

# Global Photovoltaic Grade Polysilicon Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GB8DDE1DD187EN.html>

Date: August 2026

Pages: 173

Price: US\$ 4,480.00 (Single User License)

ID: GB8DDE1DD187EN

## Abstracts

The global Photovoltaic Grade Polysilicon market size is expected to reach \$ 14138 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

PV-grade polysilicon refers to high-purity polycrystalline silicon that is chemically refined and qualified for crystalline-silicon photovoltaic manufacturing. It is one of the most critical upstream silicon feedstocks in the solar photovoltaic value chain. PV-grade polysilicon is typically produced from metallurgical-grade silicon through trichlorosilane- or silane-based chemical purification, deposition, crushing, cleaning, classification and packaging processes. It is mainly consumed in monocrystalline ingot pulling and multicrystalline ingot casting, and is ultimately linked to downstream wafer, cell and module production for TOPCon, HJT, BC/IBC, PERC and multicrystalline photovoltaic technologies.

In terms of production route and physical form, PV-grade polysilicon mainly includes Siemens-process rod/chunk polysilicon and fluidized-bed reactor granular polysilicon. Siemens-process products are generally supplied as rods, chunks, chips or crushed pieces, with high process maturity, stable purity and broad downstream qualification. FBR granular polysilicon is generally supplied in granular or near-spherical form, with good flowability, suitability for continuous feeding or furnace recharging, and potential advantages in energy consumption and carbon footprint.

In terms of downstream qualification grade, PV-grade polysilicon can be further classified into N-type mono-grade PV polysilicon, P-type mono-grade PV polysilicon, and multi-grade or lower-grade PV polysilicon. N-type mono-grade material requires stricter control of boron, phosphorus, carbon, oxygen, metallic impurities, surface

cleanliness and lot-to-lot consistency, and is mainly used for high-efficiency N-type cell technologies such as TOPCon, HJT and BC/IBC. P-type mono-grade material is mainly used for PERC and other P-type monocrystalline routes. Multi-grade or lower-grade PV polysilicon is mainly used for multicrystalline ingot casting, lower-grade PV applications or blending.

The PV-grade polysilicon market has shifted from a high-margin expansion cycle into a phase defined by oversupply correction, cost differentiation, N-type upgrading and reassessment of regional supply concentration. PV-grade polysilicon is the core upstream silicon feedstock for crystalline-silicon photovoltaics, directly determining the cost base of monocrystalline ingot pulling, multicrystalline ingot casting and wafer production. During 2020-2024, global output expanded rapidly as photovoltaic installations accelerated, wafer makers expanded capacity and downstream players competed for secure raw material supply. Prices rose sharply during the tight-supply period. However, as large-scale Chinese capacity came online, supply exceeded the actual absorption capacity of wafer, cell and module manufacturers, pushing the industry into a deep price-adjustment cycle. The decline in 2025 output compared with 2024 indicates that part of the high-cost capacity has already entered curtailment, maintenance or exit pressure. The industry logic is therefore moving from capacity expansion to cost position, product quality and customer qualification.

On the supply side, China has become the structural center of global PV-grade polysilicon production. Large production clusters in Xinjiang, Sichuan, Inner Mongolia, Qinghai and Yunnan combine electricity access, metallurgical silicon supply, polysilicon production, wafer manufacturing and downstream photovoltaic demand. Major suppliers such as Yongxiang, GCL Technology, Xinte Energy, Daqo New Energy, East Hope, Asia Silicon, Qinghai Lihao and Hongyuan form the core global supply base. Non-Chinese capacity remains strategically relevant for supply-chain security, low-carbon sourcing, traceability and trade-compliance reasons, but it is difficult for overseas producers to compete directly with Chinese integrated capacity in terms of cost, scale and downstream ecosystem. In the medium term, the strategic value of non-Chinese supply is likely to be higher than its scale value.

In terms of product structure, competition is shifting from ordinary PV-grade polysilicon to N-type mono-grade material and lower-energy granular silicon. The penetration of TOPCon, HJT and BC/IBC cell technologies raises requirements for boron, phosphorus, carbon, metallic impurities, surface cleanliness and lot-to-lot consistency. This supports higher demand for N-type mono-grade polysilicon. Siemens-process rod and chunk polysilicon remains the mainstream product form because of its mature process base

and broad customer qualification. At the same time, FBR granular polysilicon is gaining attention because of its advantages in flowability, continuous feeding, furnace recharging efficiency, energy consumption and carbon footprint. In practice, granular silicon is more likely to be used in blending with chunk material in the near term rather than replacing Siemens-process material outright.

Pricing has become increasingly commodity-like. The main variables are supply-demand balance, inventory levels, wafer operating rates and producer cash costs. Low prices in 2025-2026 are likely to compress margins for second- and third-tier producers and accelerate consolidation. In the long run, demand will still be supported by global solar installations, N-type cell penetration and downstream module replacement, but market value growth will not simply come from tonnage expansion. More value is likely to concentrate in low-power-consumption capacity, low-carbon production, high-purity N-type material, FBR granular technology and stable qualification with leading wafer customers. The central market view is therefore clear: long-term volume demand remains supported, price recovery is constrained by excess capacity, and profit pools will increasingly shift toward producers with low cost, low carbon intensity, high product quality and strong downstream customer access.

This report studies the global Photovoltaic Grade Polysilicon production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photovoltaic Grade Polysilicon and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Photovoltaic Grade Polysilicon that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Photovoltaic Grade Polysilicon total production and demand, 2021-2032, (Kilotons)

Global Photovoltaic Grade Polysilicon total production value, 2021-2032, (USD Million)

Global Photovoltaic Grade Polysilicon production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Photovoltaic Grade Polysilicon consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Photovoltaic Grade Polysilicon domestic production, consumption, key domestic manufacturers and share

Global Photovoltaic Grade Polysilicon production by manufacturer, production, price,

value and market share 2021-2026, (USD Million) & (Kilotons)

Global Photovoltaic Grade Polysilicon production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Photovoltaic Grade Polysilicon production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Photovoltaic Grade Polysilicon market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Yongxiang, GCL Technology, Xinte Energy, Daqo New Energy, Asia Silicon, Hongyuan, ERDOS, East Hope, Qinghai Lihao, Xinjiang Qiya, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Photovoltaic Grade Polysilicon market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Photovoltaic Grade Polysilicon Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Photovoltaic Grade Polysilicon Market, Segmentation by Type:

N-type PV Polysilicon

P-type PV Polysilicon

Others

#### Global Photovoltaic Grade Polysilicon Market, Segmentation by Production Process:

FBR Granular Polysilicon

Siemens-process Rod/Chunk Polysilicon

#### Global Photovoltaic Grade Polysilicon Market, Segmentation by Application:

TOPCon Cells and Modules

HJT Cells and Modules

BC / IBC Cells and Modules

PERC Cells and Modules

Others

#### Companies Profiled:

Yongxiang

GCL Technology

Xinte Energy

Daqo New Energy

Asia Silicon

Hongyuan

ERDOS

East Hope

Qinghai Lihao

Xinjiang Qiya

Jiangsu Runergy

Xinjiang Jingnuo

Xinjiang Goens

Dongli

Risen Energy

CSG

Baofeng Group

Tian Hong

Hoshine

Wacker

OCI

Hemlock Semiconductor

REC

United Solar Polysilicon

Key Questions Answered:

1. How big is the global Photovoltaic Grade Polysilicon market?
2. What is the demand of the global Photovoltaic Grade Polysilicon market?
3. What is the year over year growth of the global Photovoltaic Grade Polysilicon market?
4. What is the production and production value of the global Photovoltaic Grade Polysilicon market?
5. Who are the key producers in the global Photovoltaic Grade Polysilicon market?
6. What are the growth factors driving the market demand?

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