

Global N-type 110?m and 130?m Silicon Wafer Market Growth 2026-2032

<https://marketpublishers.com/r/GEB1679BBB63EN.html>

Date: July 2026

Pages: 86

Price: US\$ 3,660.00 (Single User License)

ID: GEB1679BBB63EN

Abstracts

The global N-type 110?m and 130?m Silicon Wafer market size is predicted to grow from US\$ 4696 million in 2025 to US\$ 9005 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

N-type 110 ?m and 130 ?m photovoltaic silicon wafers refer to solar cell wafers made from N-type monocrystalline silicon substrates, with thicknesses of approximately 110 micrometers and 130 micrometers, respectively. They are mainly used in the manufacturing of high-efficiency crystalline silicon solar cells such as TOPCon, HJT, and IBC / BC cells.

By reducing wafer thickness, these wafers help lower silicon consumption and non-silicon costs. At the same time, they must maintain sufficient mechanical strength, minority carrier lifetime, low oxygen and carbon content, low breakage rate, and good process compatibility across crystal pulling, wafer slicing, cleaning, texturing, cell processing, and module packaging.

The 110 ?m specification is generally more oriented toward HJT, thin-wafer high-efficiency cells, and low-temperature process routes, while the 130 ?m specification is more commonly used in mainstream N-type cell routes such as TOPCon, where cost, yield, and mass-production stability need to be balanced.

From the perspective of the industry?s fundamental nature, N-type 110 ?m and 130 ?m photovoltaic silicon wafers are key base materials in the transition of high-efficiency crystalline silicon solar cells from P-type to N-type technology and from thicker wafers toward thinner wafers. Their value lies not only in providing the silicon substrate for solar cells, but also in reducing silicon consumption and module manufacturing costs

through wafer thinning, while supporting further efficiency improvements in high-efficiency cell technologies such as TOPCon, HJT, and IBC / BC. Compared with traditional P-type wafers, N-type wafers offer better minority carrier lifetime and lower potential for light-induced degradation, making them an important foundation for the iteration of high-efficiency cell technologies. The thickness difference between 110 μm and 130 μm essentially reflects the industry's balancing choice between further cost reduction and maintaining stable mass-production yield. From the perspective of demand structure, 130 μm N-type wafers are currently closer to mainstream mass-production applications, especially for N-type cell routes such as TOPCon that have already achieved large-scale industrialization. While TOPCon manufacturers seek to reduce silicon consumption, they also pay close attention to wafer slicing yield, cell breakage rate, equipment compatibility, and module packaging reliability. Therefore, 130 μm wafers offer a relatively good balance between cost reduction and manufacturing stability. In contrast, 110 μm N-type wafers are more oriented toward HJT, thin-wafer high-efficiency cells, and the next stage of cost reduction. Because HJT features a low-temperature process and a symmetrical structure, it is more adaptable to wafer thinning and is therefore more likely to lead mass-production validation of 120 μm , 110 μm , or even thinner specifications. Overall, 130 μm is the current mainstream mass-production balance point, while 110 μm represents an important direction for wafer-thinning upgrades and future cost optimization. From the perspective of technical challenges, the core challenge of N-type thin wafers is not simply cutting thinner, but maintaining wafer strength, electrical performance, and full-process yield at reduced thicknesses. Lower wafer thickness directly reduces silicon consumption, but it also increases the risks of breakage, microcracks, warpage, handling damage, and module packaging stress. This places higher requirements on crystal pulling quality, diamond wire slicing, cleaning and texturing, cell processing, automated handling, and module packaging. The 110 μm wafer, in particular, requires higher equipment precision, tighter process windows, better wafer-to-wafer consistency, and more rigorous customer validation in mass production. Whether wafer thinning can continue to advance in the future depends not only on the slicing capability of wafer manufacturers, but also on whether cell and module manufacturers can build a systematic balance among efficiency, yield, reliability, and cost. From the perspective of the competitive landscape, the market for N-type 110 μm and 130 μm photovoltaic silicon wafers is mainly driven by leading companies with integrated capabilities in crystal pulling, wafer slicing, cell manufacturing, and module production. Companies such as LONGi Green Energy, TCL Zhonghuan, JinkoSolar, JA Solar, Trina Solar, and Tongwei have strong influence across the N-type wafer, cell, and module value chain. Among them, integrated companies can accelerate the validation and adoption of new thickness specifications through internal cell and module demand. Specialized wafer manufacturers place

greater emphasis on large-size wafers, wafer thinning, low-damage slicing, and highly consistent supply capability. As N-type cell capacity continues to expand, wafer competition will no longer focus only on size and price, but will further shift toward thickness control, wafer quality stability, breakage rate, customer process compatibility, and supply chain coordination. From the perspective of market outlook, N-type 110 ?m and 130 ?m photovoltaic silicon wafers are still in a rapid growth stage, with long-term trends clearly benefiting from the increasing penetration of N-type cells and the continued cost reduction of the photovoltaic industry. In the short term, 130 ?m will remain the more prudent and easier-to-scale mainstream specification, especially in the TOPCon route; 110 ?m is more likely to be gradually adopted first in HJT, high-efficiency thin-wafer cells, and certain advanced technology routes. In the future, as slicing losses decline, handling equipment is upgraded, low-damage cell processes mature, and module packaging reliability improves, there will still be room for further reductions in wafer thickness. However, the industry also faces risks such as price-cycle volatility, overcapacity, yield pressure, and reliability risks caused by excessive wafer thinning. Overall, N-type 110 ?m and 130 ?m wafers are not a niche material independent of the photovoltaic industry, but a key supporting link in the evolution of high-efficiency photovoltaic cell technologies and the reduction of silicon costs.

LP Information, Inc. (LPI) ' newest research report, the "N-type 110?m and 130?m Silicon Wafer Industry Forecast" looks at past sales and reviews total world N-type 110?m and 130?m Silicon Wafer sales in 2025, providing a comprehensive analysis by region and market sector of projected N-type 110?m and 130?m Silicon Wafer sales for 2026 through 2032. With N-type 110?m and 130?m Silicon Wafer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world N-type 110?m and 130?m Silicon Wafer industry.

This Insight Report provides a comprehensive analysis of the global N-type 110?m and 130?m Silicon Wafer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on N-type 110?m and 130?m Silicon Wafer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global N-type 110?m and 130?m Silicon Wafer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for N-type 110?m and 130?m Silicon Wafer and breaks down the forecast by Wafer Thickness, by Application, geography, and market size to

highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global N-type 110?m and 130?m Silicon Wafer.

This report presents a comprehensive overview, market shares, and growth opportunities of N-type 110?m and 130?m Silicon Wafer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Wafer Thickness:

110 ?m N-type Wafers

130 ?m N-type Wafers

Other Thin N-type Wafers

Standard / Thicker N-type Wafers

Segmentation by Cell Technology Route:

TOPCon Wafers

HJT Wafers

IBC / BC Wafers

Tandem / Perovskite-Silicon Wafers

Other High-efficiency N-type Wafers

Segmentation by Crystal Growth:

N-type Monocrystalline CZ Wafers

N-type Low-oxygen Wafers

N-type High-lifetime Wafers

N-type Doped Wafers

Other Specialty N-type Wafers

Segmentation by Application:

Cell Manufacturing

Module Manufacturing

Pilot Line

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

LONGi Green Energy Technology Co., Ltd.

TCL Zhonghuan Renewable Energy Technology Co., Ltd.

JinkoSolar Holding Co., Ltd. / Jinko Solar Co., Ltd.

JA Solar Technology Co., Ltd.

Trina Solar Co., Ltd.

Tongwei Co., Ltd.

Canadian Solar Inc. / CSI Solar

Key Questions Addressed in this Report

What is the 10-year outlook for the global N-type 110?m and 130?m Silicon Wafer market?

What factors are driving N-type 110?m and 130?m Silicon Wafer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do N-type 110?m and 130?m Silicon Wafer market opportunities vary by end market size?

How does N-type 110?m and 130?m Silicon Wafer break out by Wafer Thickness, by Application?

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