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Polysilicon Market by End-use industry (Solar PV (Monocrystalline Solar Panel and Multicrystalline Solar Panel) and Electronics), and Region (Asia-Pacific, North America, Europe and Middle East & South America) - Global Forecast to 2021

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Abstracts

“Rapid growth in solar PV and electronics industries drives the polysilicon market”

The global polysilicon market is estimated to reach USD 8.90 billion by 2021 at a CAGR of 13.00%. Increasing consumer awareness coupled with government initiatives for sustainable energy is fueling the growth of solar PV installation across the world. China, Japan and U.S. collectively accounted for two thirds of the global solar PV market. Polysilicon is the building block for more than 90% of the photovoltaic solar panels globally, and therefore the growth of the solar PV industry is subsequently driving the demand for polysilicon. Moreover, polysilicon also used as a key raw material to manufacture electronic chips. Hence, the increasing demand for semiconductors in data processing and communication devices, such as tablets and smartphones is driving the demand for polysilicon. However, the requirement of high capital expenditure for the establishment polysilicon production plants, creates high entry barriers for the smaller players, which in turn discourages market growth. Moreover, declining prices and anti-dumping policies in China are the major challenges for polysilicon manufacturers.

“Solar PV industry: The fastest growing segment in the polysilicon market”

The solar PV industry is the fastest growing end-use industry in the global polysilicon market. Increasing consumer awareness towards sustainability coupled with government incentive programs, fuels the demand for solar PV, globally. Moreover, the solar PV market demand is strengthened due to the policy of implementation of

reduction in carbon dioxide emissions by the governments of U.S., China and Japan. Polysilicon is the initial building block to manufacture solar wafers, and, the growth of crystalline solar PV installations across the world, drives the consumption of silicon wafers, which in turn drives the demand for polysilicon, globally.

“Rising demand for solar PV installation in the emerging markets of the Asia-Pacific region is one of the major drivers of the polysilicon market”

In 2015, the Asia-Pacific region accounted for the largest market share, and is estimated to remain the market leader during the forecast period, 2016 to 2021. High growth in both, the solar PV and electronics wafer manufacturing industries in China, Japan, India, and South Korea, is increasing the demand for polysilicon in both, the solar PV and semiconductor industries.

In the process to determine and verify the market size for several segments and subsegments that was gathered through secondary research, extensive primary interviews were conducted.

The breakdown of primary interviews is given below.

By Company Type - Tier 1 - 20%, Tier 2 – 32%, and Others - 48%

By Designation - C level - 18%, Director level - 27%, and Others - 55%

By Region – Asia-Pacific - 39%, North America-30%, Europe - 20%, Middle East, Africa & South America - 11%

The key companies profiled in this market research report are GCL-Poly Energy Holdings Limited (Hong Kong), Wacker Chemie AG (Germany), OCI Company Ltd. (Korea), REC Silicon ASA (Norway), Daqo New Energy Corp. (China) Tokuyama Corporation (Japan), Hemlock Semiconductor Corp. (U.S.), SunEdison, Inc. (U.S.), Woongjin polysilicon Co. Ltd. (Korea) and Activ Solar Gmbh (Austria).

Research Coverage

The report provides detailed description of the application of polysilicon in different end-use industries, such as solar PV and electronics across the world. The solar PV industry is further segmented into monocrystalline and multicrystaline solar panels. The

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competitive environment prevailing in the industry is analyzed through Porter's Five Forces analytical framework. Porter's Five Forces Analysis provides an in-depth understanding of the market attractiveness and the impact of various forces on the global polysilicon market. Moreover, the report includes an in-depth analysis of the competitive landscape, value chain, cost structure and production of polysilicon. The key factors, such as drivers, restraints, opportunities and challenges have been identified and their impact on the global polysilicon market is analyzed in the study.

Reasons to buy the report

The report will help leaders/new entrants in the market in the following ways:

1. The report segments the polysilicon market comprehensively and provides the closest approximations of the revenue for the overall market and the subsegments across different verticals and regions.
2. The report helps stakeholders to understand the pulse of the market and provides information on key market drivers, restraints, opportunities and challenges.
3. The report helps stakeholders to understand their competitors better and gain additional insights into the business. The competitive landscape section includes agreements, expansions, joint ventures and innovations undertaken by market players.
4. The report comprehensively analyses the production capacity and utilization rate of leading manufacturers, globally.

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(Company at a Glance, Business Overview, Products Offered, Key Strategy, Recent Developments, SWOT Analysis & MNM View)*

*Details on company at a glance, recent financials, Products offered, strategies & insights, & recent developments might not be captured in case of unlisted companies.

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