

China Silicon Carbide Industry Report, 2015-2019

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Abstracts

China is the largest producer and exporter of silicon carbide in the world, with the capacity reaching 2.2 million tons, accounting for more than 80% of the global total. In 2014, the total silicon carbide output in China approximated 1.03 million tons, including 670,000 tons of black silicon carbide and 360,000 tons of green silicon carbide, with a very low capacity utilization rate. It is projected that the total output in 2015 would reach 1.2 million tons.

As China's silicon carbide export quota was abolished in 2013, China's silicon carbide exports have, to a greater or lesser degree, expanded in recent years. But this was not true in 2015, which saw a low-speed growth rate. In Jan.-Nov. 2015, China's silicon carbide exports came to 291,100 tons, up 0.4% from the same period of last year; and the average export price fell from USD1.1/kg in 2013 to USD0.97/kg.

There are about 200 SiC raw materials manufacturers in China, including Yicheng New Energy, Xinjiang Longhai Silicon, Lanzhou Heqiao, and Ningxia Jinjing, etc. Among them, Yicheng New Energy constitutes China's largest silicon carbide blade material production and recycling company, with its annual silicon carbide capacity totaling 210,000 tons and its annual wafer cutting mortar recycling capacity more than 60,000 tons.

With overcapacity of SiC raw materials and ongoing falling prices in China, the corporate profits were severely squeezed. Hence, it becomes an inevitable trend to aggressively develop high value-added SiC wafer products so as to raise SiC value. Despite the fact that SiC wafer production technologies were previously in the hands of Cree, a US company, China has now broken the monopoly and achieved mass production of SiC wafer of certain size.

At present, the enterprises that mass produce SiC wafer include TanKeBlue

Semiconductor, SICC Materials, EpiWorld International, and Dongguan Tianyu Semiconductor; the sole enterprise that can produce SiC devices is Global Power Technology.

TanKeBlue Semiconductor, a wholly-owned subsidiary of Xinjiang Tianfu Energy, is the first and largest supplier of SiC mono-crystal products in China. Currently, the company has developed 2-inch, 3-inch, 4-inch and 6-inch SiC wafers, with its annual capacity of 70,000 pieces.

Global Power Technology, a leader in China in industrialization of SiC power devices, has China's only SiC device production line. In 2014, the company succeeded in mass producing SiC Schottky Barrier Diode, but the scale was still at the starting stage, with the current capacity of only 4,000 pieces/a.

The report mainly deals with the followings:

- Development of global silicon carbide industry, including the status quo of SiC raw materials and SiC wafer, etc.

- Development of China silicon carbide industry, including status quo, supply and demand, competition landscape, import & export, price trend, and development trends, etc.;

- Development of upstream and downstream sectors of silicon carbide industry;

- Operation and silicon carbide business of 18 silicon carbide manufacturers in China.

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