

China Solar Glass Industry Report, 2010-2015

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Abstracts

In domestic photovoltaic glass industry, the ultra clear glass (including ultra clear rolled glass and ultra clear float glass) is a kind of product with mature technology. There are many ultra clear glass manufacturers in China whose capacity witnesses high growth. As of late 2009, the actual annual capacity of ultra clear rolled glass in China had exceeded 600,000 tons, making China the world's largest ultra clear rolled glass producer.

In contrast, there are not so many large-scale solar coated glass manufacturers in China. And the market is mainly dominated by NSG of Japan, Dawson International and AFG of the United States. Among existing domestic enterprises, Jiangsu Xiuqiang Glasswork and Changzhou Almaden Stock are the only two that can realize the mass production of coated anti-reflection film crystalline silicon solar cell glass, with the combined capacity approximating 20 million sq meters. Likewise, only a few domestic businesses including CSG Holding and Xinyi Glass Holdings Limited started the mass production of thin film solar cell TCO glass. There are broad prospects for domestic products to substitute for imports.

This Report mainly covers the following content:

Highlights of the current development of solar glass industry, market overview and competition pattern of crystal silicon solar cell glass and thin film solar cell glass in China, and demand prospect for the upcoming five years from the perspective of moderate growth and policy stimulus based on the glass demand per unit pack;

Introduction of the status quo, operation, major projects and operation models of 43 solar glass manufacturers in China;

Suggestions for concerned investors in line with the competition pattern among

businesses as well as the status quo and demand prospect of domestic solar glass market.

Representative solar glass enterprises in China include large-scale groups like CSG Holding, as well as two solar glass processing companies, namely, Jiangsu Xiuqiang Glasswork and Changzhou Almaden Stock.

As of late 2010, the ultra clear rolled glass capacity of CSG Holding reached 12.5 million sq meters, and its solar glass capacity realized 460,000 sq meters. Presently, CSG Holding invested RMB499 million to build a 600T/D ultra clear rolled glass production line in Dongguan, a project that is expected to realize the full capacity in late 2011. In addition, it invested RMB510 million to construct a 4 million-sq m TCO glass production line, a project that is expected to realize the full capacity in late 2012.

Changzhou Almaden Stock (002623.SZ), listed on Shenzhen Exchange Stock in September 2011, is mainly engaged in the processing and manufacturing of photovoltaic anti-reflection glass with the glass sheets bought from other enterprises. The company, on the one hand, makes full use of the huge capacity of ultra clear glass in China, on the other hand, has made rapid breakthrough in the solar glass industry based on its own coating technology. As of late June, 2011, the coating processing capacity of the company realized 18 million sq meters. In H1 2011, the output of coating glass registered 10.8084 million sq meters.

Jiangsu Xiuqiang Glasswork (300160.SZ) is mainly engaged in the production of home appliance chromatic crystallized glass and solar glass, and is the major supplier of solar battery businesses including LDK Solar and Canadian Solar Inc. It's expected that the company's capacity of crystalline silicon solar glass and TCO solar glass will reach 7.91 million sq meters and 300,000 sq meters at the end of 2011, respectively. In H1 2011, the company's revenue from anti-reflection crystalline silicon cell packaging glass business attained RMB 81.04 million, up 2.89 times year-on-year.

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