

Global and China Photovoltaic Glass Industry Report, 2014-2018

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Abstracts

Featuring controllable light transmitting, energy-saving & generation and environmental friendliness, photovoltaic glass (PV glass) is primarily applied in solar cell module, and its transparency directly affects conversion efficiency of solar cell. PV glass consists mainly of crystalline silicon PV glass and thin-film PV glass.

PV glass is an important accessory in solar cell industry, growing along with development of PV industry. During 2000-2014, Global installed PV capacity recorded CAGR of 42.9%, compared with 70.7% in China.

Driven by PV industry, China's PV glass consumption has increased gradually, exceeding 200 million m² in 2014. Since 2006, promoted by big profits and favorable policies, various domestic manufacturers has invested to build PV glass production lines, combined with the shifting of foreign companies into China, thus leading to rapid expansion of PV glass capacity in China. Standard Conditions for the Photovoltaic Manufacturing Industry issued in 2015 lifted access threshold of PV industry, thus decelerating expansion pace of PV glass capacity.

With improvement in return on investment (ROI) in PV-related industries, foreign companies like AGC explore high-end PV glass business via cooperation; domestic flat glass manufacturers including CSG Holding and Xinyi Glass actively expand PV glass capacity; new entrants such as IRICO Electronics and China National Building Materials also make investment in PV glass field.

AGC: Established partnership with Rolith in 2013 to co-develop advanced anti-reflective glass; entered into a strategic cooperation agreement with Spanish Onyx Solar in 2014 to promote and sell PV glass within North America manufactured by Onyx Solar

CSG Holding: In Mar. 2014, Wujiang CSG ultra-white rolled solar glass production line was completed and put into operation, with capacity of 650t/d and costs down more than 30% than that of the first and second production lines; in Nov. of the same year, the company completed high-performance ultra-thin glass production line mainly for the production of touch screen and PV module cover plate.

Xinyi Glass: In Nov. 2014, the company spent HK\$ 77.31 million to buy the land in Malacca, Malaysia for the construction of an ultra-clear glass production plant, with products targeting Thailand, the Philippines and Singapore.

IRICO Electronics: The company sold shares twice, totaling 10 million, and obtained RMB76.40 million for development of solar PV glass and new electronic chemical materials.

China National Building Materials: The company has, in recent years, set foot in ultra-clear PV glass, TCO glass, etc, and built dozens of ultra-clear PV glass. In Sep. 2014, Bengbu Design & Research Institute for Glass Industry of CNBM acquired Avancis under France Compagnie de Saint Gobain, which manufactures thin-film solar cell and CIGS thin film cell, to further promote thin film solar industry chain.

Global and China Photovoltaic Glass Industry Report, 2014-2018 by ResearchInChina covers the following:

- Policy environment and industry environment for the development of global PV glass industry;

- Global and Chinese PV glass market size, market demand of main products, competitive landscape;

- Status quo of global and China solar cell and solar module market;

- Operation, revenue structure and layout in China of 5 foreign PV glass companies;

- Operation, revenue structure and competitive landscape of 18 domestic PV glass companies

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