

Research Report on China Photovoltaic (PV) Industry, 2015-2019

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Abstracts

Description

In recent years, photovoltaic industry in China has undergone rapid development. And in 2007, China became the largest photovoltaic producer with export reaching USD 2.838 billion. In 2014, China's total imports and exports of solar photovoltaic cell was USD 18.28 billion that increased 15.09% year on year, among which export was USD 14.41 billion, increasing 17.27% and import was USD 3.87 billion, increasing 7.62% year on year.

For photovoltaic export, the following problems exist in export structure and market: overdependence on processing trade, lack of independent R&D system, unstable structure of export market and the risk of trade frictions in emerging market.

Since 2011, the contraction of overseas photovoltaic market has rendered Chinese photovoltaic industry which has developed fast for nearly a decade in difficulty. Therefore, the Chinese government has issued a series of policies to support photovoltaic industry. For example, National Energy Administration has successively raised the power generation target of the twelfth five-year plan of photovoltaic; the Ministry of Industry and Information Technology has declared to promote the development of BIPV technology. On Feb.1, 2012, the Ministry of Finance of the People's Republic of China issued the Notice on Making Efforts to the Golden Sun Demonstration Work of the Year 2012 to fasten the large-scale application of photovoltaic generation. In 2013, the State Council published the Several Opinions on Promoting the Healthy Development of PV Industry and a series of supporting policies. In recent years, photovoltaic generation has developed fast in China.

In 2014, the installed capacity of photovoltaic grid-connected generation in China was 28.05 million kilowatts with a year-on-year growth of 60%, among which 23.38 million kilowatts were generated by photovoltaic power station and 4.67 million kilowatts by distributed power station. The annual generation of photovoltaic was 25 billion kilowatt-hours, increasing over 200% year on year.

In 2014, new grid-connected photovoltaic generation was 10.60 million kilowatts in China which accounted for a quarter of global new capacity and one third of photovoltaic module output in China and realized the target set by the Several Opinions on Promoting the Healthy Development of PV Industry of achieving a growth of approximately 10 million kilowatts per annum. Besides, 8.55 million kilowatt photovoltaic power station and 2.05 million kilowatt distributed power station were added too.

In 2014, a pattern of common development of east and west with emphasis on east has taken shape in photovoltaic generation in China. New installed capacity in East China was 5.6 million kilowatt, accounting for 53% of the sum. Jiangsu and Hebei Province topped the list of new installed capacity.

In 2014, the application pattern of photovoltaic generation kept innovating with 30 distributed photovoltaic generation demonstration areas being designated by the National Development and Reform Commission as infrastructure projects encouraging social investment. Currently, 0.5 million kilowatts have already been built and 0.6 million kilowatts are under construction, attracting over CNY 10 billion investment.

In 2014, photovoltaic cell manufacturers in China maintained strong international competitiveness. Among the TOP 10 producers, six came from China, among which four were in the top four. As to the development of photovoltaic upstream industry, about 130,000 tons of polysilicon were produced in China, increasing nearly 50% year on year and about 90,000 tons were imported. And the total output of photovoltaic module surpassed 33 million kilowatt with a year-on-year growth of 17%, among which about 68% were exported. Most enterprises have improved their capacity utilization with TOP 10 reaching above 87% on average.

As to the current development of photovoltaic market in China, there are still some problems like financing difficulty, high construction cost, long payback period and difficulty in connecting to grid despite a series of support policies issued by the government.

To some extent, photovoltaic industry in China still faces the problem of depending on

overseas countries for raw materials and market. Particularly, as photovoltaic is export-oriented, trade frictions are easy to occur. Meanwhile, due to the overall low level of profitability in photovoltaic industry and the underinvestment in research and development, most photovoltaic enterprises have not yet built a mature R&D system and the technological level of products is generally low.

Readers can get at least the following information through this report:

policy and economic environment facing photovoltaic industry in China

development of photovoltaic power station and distributed photovoltaic in China

supply and demand of photovoltaic industry in China

key photovoltaic enterprises in China

anti-dumping events experienced by Chinese photovoltaic enterprises

photovoltaic import and export

development forecast of photovoltaic industry in China

The author suggests the following groups of people purchase this report:

related enterprises in photovoltaic industrial chain

photovoltaic enterprises

investors/research institutions interested in photovoltaic industry in China

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