

Research Report on China's Photovoltaic Industry, 2018-2022

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Abstracts

DESCRIPTION

In 2017, the newly installed capacity of the global PV market reached 102 GW, with an increase of over 37% over the same period of last year, and the cumulative PV capacity reached 405 GW. China's newly installed capacity was 53 GW, increasing by over 53.6% YOY, ranking first in the world for five consecutive years. The cumulative installed capacity of China reached 130 GW, securing the first in the world for three years in a row. In 2017, China exported approximately 37.9 GW of photovoltaic modules, with an increase of 77.9% YOY. Its PV products are increasing in exports to emerging markets such as India and Brazil.

In recent years, the growth engine of the Chinese PV market has gradually shifted from exports to both domestic and export markets. In 2017, the market scale of photovoltaic power generation enlarged rapidly. The newly installed capacity registered 53.06 million kilowatts, which covered 33.62 million kilowatts of photovoltaic power stations, with an increase of 11% YOY, and 19.44 million kilowatts of distributed photovoltaics, increasing by 3.7 times YOY. This has become the highlight of the development of the photovoltaic market last year.

According to CRI's analysis, the rapid growth of China's photovoltaic power generation in 2017 directly drove the development of each sector along the photovoltaic industry chain. In the same year, the polysilicon production was 242,000 tons, with an increase of 24.7% YOY; the wafer production was 87 GW, with an increment of 39% YOY; the battery output reached 68 GW, growing by 33.3% YOY; the solar modules were produced of 76 GW, up by 43.3% YOY; the output of inverters was 62 GW, with an increase of 55% over the same period of last year. China's production scale of different

joints along the PV industry chain all exceeded 50% in the world, maintaining the first place. The great development of the photovoltaic industry has also promoted the technological advancement, which has reduced the production costs and electricity costs.

With the advancement of technology and scale economies, the production cost of Chinese leading polysilicon companies in 2017 fell to CNY 60,000/ton, the production cost of modules dropped to CNY 2 per watt or less, the investment cost of photovoltaic power generation systems dropped to CNY 5/watt and the cost of power generation decreased to CNY 0.5-0.7 per kWh.

Benefited from the expansion of the market size, the increment of company's shipment volume and the reduction in the production costs, in 2017, Chinese PV companies made remarkable progresses in profitability.

The development of the photovoltaic industry is affected by multiple factors such as Chinese government policies, international and domestic market demands and international trade barriers. In recent years, the Chinese government has given incentives to the PV power plants including financial subsidies and preferential on-grid tariffs. Because of these policies, photovoltaic power plants attracted large amounts of capital and were built in a great quantity. In the light of the overheat in the photovoltaic industry, the government has also issued some measures to control excess production capacity, mainly reducing financial subsidies.

It is expected that during 2018 to 2022, the demand in PV market and PV export volume will both continue to increase. For investors, there are still many opportunities in China's photovoltaic industry chain.

SELLING POINTS:

Development environment of China's photovoltaic industry

Supportive and restrictive policies of the Chinese government on the photovoltaic industry

Analysis on China's photovoltaic industry chain

Supply and demand analysis on China's photovoltaic industry

Export analysis of China's photovoltaic industry

Chinese photovoltaic manufacturers

Chinese photovoltaic market competition

Driving forces and opportunities of the photovoltaic industry from 2018 to 2022

Threats and Challenges of the photovoltaic industry

Prospects of China's photovoltaic industry from 2018 to 2022

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