

# Research Report on China's Solar Polysilicon Industry, 2018-2022

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## Abstracts

### DESCRIPTION

The production volume of China's polysilicon reached 242,000 tons in 2017, representing a CAGR of 70.0% from 2007 to 2017. The newly installed photovoltaic bases in China reached 53 GW in 2017, ranking first in the world for five consecutive years. Besides, the total installed capacity amounted to 130 GW, taking the first place for three consecutive years. Production scales of every link in the domestic industry chain all took over 50% of the global total and continued to be leading in the world.

The export value of photovoltaic products, including wafer, cell, module and inverter, totaled USD 15.777 billion in 2017, increasing by 5.3% YOY. The export value of wafer, cell, module and photovoltaic inverter was respectively USD 2.968 billion, USD 0.797 billion, USD 10.61 billion and USD 1.402 billion, with a respective YOY increase of 14.4%, 17.39%, -1.2% and 46.3%. In addition, the export volume respectively reached 4.404 billion, 3.36 GW, 30 GW and 15.92 million units.

According to CRI, solar grade polysilicon is the main raw material for crystalline silicon photovoltaic cells. On top of this, there were 22 polysilicon enterprises in normal production by 2017, with the effective capacity totaling 280,000 tons, up by 70,000 tons over 2016. Among them, major manufacturers include GCL Silicon Technology Holdings Inc., TBEA Co., Ltd., Daqo New Energy Corp., etc. Also, by the end of 2017, the aggregate capacity of 10 enterprises, each of which exceeded 10,000 tons, accounted for more than 70% of the country's total.

Since 2011, Ministry of Commerce of the PRC has made a series of anti-dumping investigations on imported polysilicon, thereby restraining the imports to some extent

and promoting the local polysilicon industry. In 2017, the production volume of polysilicon in the world amounted to 436,000 tons, of which China made up about 55.5%. However, China still imported 159,000 tons of polysilicon, with an import dependency of 39.8%. With the continuous expansion of the domestic polysilicon production capacity, the proportion of imports is expected to decline gradually.

CRI analyzes that with the advancement of technology in recent years, both the utilization efficiency of polysilicon and the photoelectric conversion efficiency have risen continuously. Relevant statistics show that in 2017, to produce 224 W silicon wafer needed 1 kg silicon materials. As technology develops in 2018 (especially with the progress of slicing technology) and monocrystalline silicon is more widely applied in the photovoltaic industry, 1 kg silicon materials can produce 280 W silicon wafer. In 2017, the production volume of silicon wafer equivalent to the capacity of modules was 87.6 GW; while in 2018, the production volume of polysilicon is projected to reach 400,000 tons, and that of silicon wafer equivalent to the capacity of modules will amount to 112 GW. It is predicted that the total demand for photovoltaic modules in the global market will be 110 GW in 2018, and the capacity of China's polysilicon will even surpass the global demand.

Based on CRI's analysis, the main driving force for the growth of China's polysilicon market in the next few years is still the demand from the photovoltaic industry, where the increase in domestic demand and exports is equally important. It is estimated that the emerging photovoltaic market will grow rapidly in the next few years. Among them, the installation demand mainly comes from Asia and America, and the market is also opening in Middle East and Africa.

CRI predicts that the demand for polysilicon in the Chinese market still has large room to increase. Although the production of polysilicon can gradually meet the domestic demand, monocrystalline silicon has been popular since 2016, which needs to be made of high-quality polysilicon raw materials. Concerned about the quality of domestic polysilicon, Chinese manufacturers of single wafer still import high-purity one from Germany and South Korea. It is forecasted that China will import over 100,000 tons of polysilicon a year from 2018 to 2022.

## **SELLING POINTS:**

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Anti-dumping Measures of Chinese Government against Imported Polysilicon

Supply and Demand of Polysilicon in China

Polysilicon Import and Export in China, 2013-2017

Market Competition of Polysilicon in China

Price Trend of Polysilicon in China

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