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Research Report on Photovoltaic Industry in China, 2016-2020

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Abstracts

Description

The photovoltaic industry develops rapidly in China in recent years. China became the world's largest producer of photovoltaic products in 2007 with the export value of USD 2,838 million. In 2014, the total import and export value of Chinese solar photovoltaic products was USD 18.28 billion, increasing by 15.09% YOY. Among that, the export value was USD 14.41 billion, increasing by 17.27% YOY; the import value was USD 3.87 billion, up by 7.62% YOY.

Judged from the export structure and the market, Chinese export of photovoltaic products still has the following problems: it relies too much on processing trade and has not formed an autonomous R&D system; the structure of export market is not stable; the risk of trade friction exists in emerging markets at any time.

After nearly 10 years of rapid development, China photovoltaic industry entered into a difficult period as overseas photovoltaic market shrank in 2011. Developing domestic markets became the consensus of the government and enterprises. China is rich in solar energy resource with the theoretical reserves equal to 1.7 trillion tons of standard coal every year. The potential of the exploitation of solar energy resource is enormous. China is situated in the northern hemisphere with the distance between the north and the south and that between the east and the west are both over 5,000 km. There is abundant solar energy resource in the vast land of China. In most places, the annual average daily radiation is more than 4 kWh/m2 and the annual sunshine duration is over 2,000 h, so there exists a huge development potential.

In recent years, as China's demand for energy increases, the environment protection

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pressure grows. After the great setback against it caused by trade protection of western countries in 2012, China photovoltaic industry is gradually returning to a sensible state, reshaping supply and demand relationship and approaching the balance of market pattern. With the deepening of the idea of environment protection and the fluctuation of the price of fossil fuels, Chinese government has formulated a series of policies to support the downstream application of photovoltaic industry since 2013. New photovoltaic installed capacity reached 11.3 GW in 2013, increasing by 126% than that in 2012 and ranking the first in the world.

In 2014, the total photovoltaic power generation grid capacity was 28.05 MW, increasing by 60% YOY, including 23.38 MW in photovoltaic power stations and 4.67 MW of distributed photovoltaic power. The annual photovoltaic power generating capacity is about 25 billion kilowatt-hours, increasing by 200% YOY.

In 2014, new grid photovoltaic power generation capacity was 10.60 MW, occupying about a quarter of that of the whole world and a third of the output of Chinese photovoltaic cell modules, realizing the target of an annual increase of 10 MW put forward in Suggestions on Promoting the Healthy Development of Photovoltaic Industry, with 8.55 MW in photovoltaic power stations and 2.05 MW of distributed photovoltaic power.

Chinese photovoltaic battery manufacturers continued to keep strong international competitiveness in 2014. Among the famous enterprises which were the top ten in terms of global output, China occupied six places while top 4 were all Chinese enterprises. In terms of the development of upstream photovoltaic industry, the domestic output of polysilicon was about 130,000 tons in 2014, increasing by 50% YOY, while the import volume was about 90,000 tons. The total output of photovoltaic cell modules was over 33 million kilowatts, increasing by 17% YOY. The proportion of export was about 68%. Most enterprises improved their capacity utilization. The average capacity utilization of top 10 enterprises was over 87%.

To some extent, China photovoltaic industry still faces the situation where raw materials and market rely on overseas markets. As photovoltaic products are export-focused, it is very easy to cause trade friction. In the meantime, as the overall profit level of China photovoltaic industry is low, investment in R&D is insufficient. Therefore, most photovoltaic enterprises have not yet developed a mature R&D system and the technical level of products is universally low.

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