Research Report on China Polysilicon Industry, 2017-2021

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Abstracts

DESCRIPTION

In 2016, production volume of polysilicon in China was 194 thousand tons, up by 17.5% YOY; production volume of silicon wafers was about 63 GW, up by 31.2% YOY; production volume of photovoltaic batteries was 53GW, up by 20.7% YOY, new installed grid-connection capacity of photovoltaics reached 34.5GW, up by 127% YOY. Production scales of all links in the industry chain all took over 50% of that of the globe and continued to be the first in the world.

According to CRI, solar grade polysilicon is the major raw material of crystal silicon photovoltaic battery pieces and the fundamental link with the highest technical barrier and the most intensive investment in the whole photovoltaic industry chain. By the end of 2016, newly installed capacity of photovoltaic power generation was 34.54 million kW, and cumulative installed capacity was 77,420,000 kW, both ranking the first in the globe.

In 2016, export value of silicon wafers, battery pieces and components was around USD 13.84 billion, down by 11.3% YOY. Export to emerging markets like India, Turkey, Chile and Pakistan significantly increased while that of occident traditional markets decline to below 30%. In 2016, photovoltaic export decline was influenced by many domestic photovoltaic enterprises' setting up plants oversea. Chinese enterprises invested to build photovoltaic enterprises in over 20 foreign countries. By the end of 2016, production capacity of photovoltaics built oversea was over 5 GW, showing clear trend of globalized allocation of production.

According to CRI, by the end of Jun, 2017, polysilicon enterprises in normal production was 17, declining from over 80 in the end of 2011. Annual effective production capacity was about 230 thousand tons/year, which increased by 20 thousand tons / year compared to the end of 2016. GCL-Poly Energy Holdings Limited, TBEA Co., Ltd. and Daqo New Energy Corp. are leading enterprises.

It is estimated that, by the end of 2017, annual production capacity of polysilicon in China will reach 250-260 thousand tons/year. The current domestic polysilicon production capacity can satisfy demand for raw materials of near 40 GW battery pieces. Presently, over 100 thousand tons of imported polysilicon is mostly processed into photovoltaic components for export which are not directly used by domestic photovoltaic power stations.

From 2008, domestic polysilicon industry was severely impacted by imported products from the U.S. and South Korea. By the end of 2011, due to the large increase of imported polysilicon, import price kept dropping which caused that many domestic polysilicon enterprises stopped production and were in severe difficulties on a large scale. On Jun 20th, 2012, Ministry of Commerce of PRC issued a public notice announcing anti-dumping investigations. On Jan 20th, 2014, Ministry of Commerce of PRC published "Notice on Final Ruling of Anti-dumping Investigation on Imported Solar Grade Polysilicon from the U.S. and South Korea" and ruled that products from the two countries were dumped in China, which had substantive damage to domestic industry and causality existed between dumping and the damage. After that, Ministry of Commerce of PRC implemented a series of anti-dumping investigations on polysilicon, which restrained polysilicon import to some extent, and promoted the increase of domestic polysilicon production capacity and production volume.

According to CRI analysis, fast growing markets in recent years are China, the U.S. and Japan. Chinese government increased additional electrovalence from CNY 1.5 cents/kWh to CNY 1.9 cents/kWh, which filled financing gap of governmental subsidies on wind, electricity and photovoltaic projects. In addition, at the end of 2015, the U.S. government announced to extend 30% of tax credit policies on photovoltaic investment to 2019, which encouraged keeping active investments in the U.S. photovoltaic market in 2017-2019.

Due to the prediction of increasing demand for polysilicon in China photovoltaic industry in the next few years, some new investors, including East Hope Group, announced to enter the market. East Hope Group has invested to build a polysilicon project with annual production capacity of 120 thousand tons in Changjizhou, Xinjiang Province so far. When it is finished, the group will become the largest Polysilicon manufacturer in

China. The project adopts the most advanced improved Siemens production process in the world and is equipped with facilities like self-owned power plants to largely reduce costs.

According to CRI, there is a large growth potential in demand for polysilicon in China. However, polysilicon industry in China is in an adjustment period facing many uncertainties like policies and market risks. Therefore, investors are supposed to analyze the market cautiously before entering.

Through this report, readers can acquire the following information or even more:

- Economy and Policy Environment Faced by China Polysilicon Industry
- Anti-dumping Measures of Chinese Government against Imported Polysilicon
- Supply and Demand of Polysilicon in China
- Polysilicon Import and Export in China, 2012-2017
- Polysilicon Market Competition in China
- Price Trend of Polysilicon in China
- Major Polysilicon Manufacturers in China and Their Operation Status, 2015-2017
- Driving Forces and Market Opportunities in China Polysilicon Industry
- Risks and Challenges Faced by Polysilicon Industry in China
- Forecast on Development of China Polysilicon Industry

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+44 20 8123 2220
info@marketpublishers.com

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COMPANIES MENTIONED

1 GCL-Poly Energy Holdings Limited
2 East Hope Group
3 TBEA Co., Ltd.
4 Daqo New Energy Corp.
5 Asia Silicon (Qinghai) Co., Ltd.
6 China Silicon Corporation Ltd.
7 Sichuan Yongxiang Polysilicon Co., Ltd.
8 Yichang CSG Polysilicon Co., Ltd.
9 Inner Mongolia Dun'an Photovoltaic Science and Technology Co., Ltd.
10 Sichuan Renesola Silicon Co., Ltd.
11 Inner Mongolia Shenzhou Silicon LLC
12 Shaanxi Tianhong Silicon Co., Ltd.
13 Inner Mongolia Phoevix Silicon Co., Ltd
14 Guodian Inner Mongolia Jingyang Energy Co., Ltd.
15 Yunnan Aixin Silicon Science and Technology Co., Ltd.

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