

Global and China Solar Polysilicon Industry Chain Report, 2008



The hiking price of oil pushes the new energies such as solar energy to the historically high. People are more concerned about fuel ethanol, solar water heater and solar battery industry. Solar polysilicon especially shows a bright prospect.

Today the markets in demand for solar battery mainly concentrate in the USA, Germany, Japan, Korea and Spain; those are in close relationship to the supporting policy. Meanwhile, the supply of high purity crystalline silicon is dominated by few giants such as Hemlock, Wacker and Tokuyama. Among the application fields of solar energy, China grasps the mature technology in solar water heater only; however, China has the same activity and enthusiastic as any other countries in exploring and developing solar PV industry.



Polysilicon Projects in China

Production Capacity of Major Polysilicon (for Solar Battery) Manufacturers Worldwide 2003-2010

Company	2003	2004	2005	2006	2007	2008E	2009E	2010E
Hemlock	2000	2100	2100	3000	5000	7100	9500	14000
Asimi(REC)	0	150	200	1500	1500	3000	3000	3000
SGS	1900	2200	2200	2200	2200	8500	8500	8500
MEMC	0	0	0	1100	1100	1400	1500	5000
Wacker	1600	1800	1900	2800	2800	5500	8500	15500
Tokuyama	1000	1200	1400	1,171,140017	1400	1500	1900	1900
Mitisubishi	300	300	300	300	350	350	350	350
_Total	6800	7750	8100	12300	14350	27350	33250	48250

Source: ResearchInChina

	Manufacturer	Planned Production	Phase I Production	
		Capacity	Capacity	
		(ton/year)	(ton/year)	
Production Capacity already Constructed	Emei Semiconductor Materials	4500	1500	
	Luoyang Sino-silicon	300	300	
	Xinguang Silicon	1260	1260	
	Xuzhou Zhongneng	1000	1000	
Production Capacity	Luoyang Sino-silicon Phase II	3000	1000	
	Yunnan Aixin Silicon	10000	1000	
under	Fujian Guixing Silicon	200	200	
Construction	Chongqing Wanzhou (Jiangsu Daquan)	6000	1500	
	Yangzhou Shunda	6000	1500	
	Asia Silicon	6000	1500	
	Wuxi Zhongcai Group	300	300	
	Sichuan Leshan (Tongcheng Stock)	10000	1000	
	Sichuan Xinjin (Tianwei Chuantou)	3000	3000	
	Sichuan Leshan (Ledian Tianwei)	3000	3000	
Production Capacity Planned to be built	Hubei Jinmen (Wuhan Jiawei)	1500	1500	
	Hubei Yichang(CSG Holdings)	4500	1000	
	Jinzhou Longhai ,Liaoning	1000	1000	
	Shizuishan, Ningxia	4000	1000	
	Hohhot, Inner Mongolia	1500	1500	
	Xin Jiang TBEA	12000	1500	
	Viyang, Hunan	5000	1000	
	Dongchuan, Qinghai (Huanghe Hydraulic Power)	1000	1000	
Total		85060	27560	

Source: ResearchInChina



In 2006, the output of solar battery in China was 438MWP, accounting for 17.1% of the world total. In 2007, the output of solar battery in China surpassed Japan and the USA, reaching 1088MWP, became the biggest producer in the world.

In term of 11 tons or more polysilicon producing 1MWP solar battery, China's self-produced polysilicon can only satisfy the production of 80MWP solar battery, but the solar battery produced in China was 1088MWP in 2007, which means the polysilicon for the rest of 1008MWP was rely on exports or other channels. Meanwhile, the price of polysilicon in China keeps rising, from 25 to 40 USD per kilogram in 2001- 2003, to 200 USD per kilogram in 2006; its average price reached 300 USD per kilogram in 2007. In late 2007 or early 2008, price of polysilicon hit a historically high at 400 USD per kilogram.

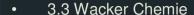
In correspondence to the hot investment plan of solar polysilicon and the price trend, Chinese manufacturers generally have the following problems: lacking of core technology, low-level repetitive constructions and incomplete industry chain mix etc. Today, parts of the key equipments still rely on imports. For example, casting furnace, wire cutting machine tool and PECVD etc.



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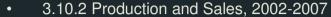
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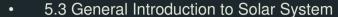
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