



Global and China Photovoltaic Glass Industry Report, 2014-2018

Jan. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Featuring controllable light transmitting, energy-saving & generation and environmental friendliness, photovoltaic glass (PV glass) is primarily applied in solar cell module, and its transparency directly affects conversion efficiency of solar cell. PV glass consists mainly of crystalline silicon PV glass and thin-film PV glass.

PV glass is an important accessory in solar cell industry, growing along with development of PV industry. During 2000-2014, Global installed PV capacity recorded CAGR of 42.9%, compared with 70.7% in China.

Driven by PV industry, China's PV glass consumption has increased gradually, exceeding 200 million m² in 2014. Since 2006, promoted by big profits and favorable policies, various domestic manufacturers has invested to build PV glass production lines, combined with the shifting of foreign companies into China, thus leading to rapid expansion of PV glass capacity in China. Standard Conditions for the Photovoltaic Manufacturing Industry issued in 2015 lifted access threshold of PV industry, thus decelerating expansion pace of PV glass capacity.

With improvement in return on investment (ROI) in PV-related industries, foreign companies like AGC explore high-end PV glass business via cooperation; domestic flat glass manufacturers including CSG Holding and Xinyi Glass actively expand PV glass capacity; new entrants such as IRICO Electronics and China National Building Materials also make investment in PV glass field.

Projects Proposed/under Construction of Major PV Glass Manufacturers in China at the Beginning of 2015

● Under Construction ● Proposed

Company	Project Location	Construction Content	Proposed/ Under Construction
	Wujiang	A 650t/d solar-energy rolled glass production line	●
	Qingyuan	A 1 millionm²/a high-performance ultra-thin glass (photovoltaic module cover plate) production line	●
	Dongguan	Investing RMB390 million to construct a on-line coating Production Line	●
	Malaysia	Spending HKD77.3 million in purchasing land to construct an ultra-clear photovoltaic glass factory	●
	Wuhu	A 1800t/d solar PV glass production line	●
	Bengbu	An "AR Coated Glass-dedicated Coating Solution" technology transfer project	●
	Duba	Investing RMB190 million on an ultrathin double-glass PV plate factory that has an annual capacity of 400,000 pieces	●
	Changzhou	Investing RMB43.76 million in a "PV Coated Glass Technological Upgrading" project	●
	Changzhou	Investing RMB390 million to construct an "ultrathin double-glass BIPV model" production project	●
	Suqian	Investing RMB110 million in a " 600,000 m²/a high-transmission visible light AR coated glass" project	●
	Ningxia	A 360kt/a solar ultra-clear glass and float glass project	●
	Zhuzhou	A 1,300t/d ultra-clear glass production line	●

Source: Global and China Photovoltaic Glass Industry Report, 2014-2018; ResearchInChina

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AGC: Established partnership with Rolith in 2013 to co-develop advanced anti-reflective glass; entered into a strategic cooperation agreement with Spanish Onyx Solar in 2014 to promote and sell PV glass within North America manufactured by Onyx Solar

CSG Holding: In Mar. 2014, Wujiang CSG ultra-white rolled solar glass production line was completed and put into operation, with capacity of 650t/d and costs down more than 30% than that of the first and second production lines; in Nov. of the same year, the company completed high-performance ultra-thin glass production line mainly for the production of touch screen and PV module cover plate.

Xinyi Glass: In Nov. 2014, the company spent HK\$ 77.31 million to buy the land in Malacca, Malaysia for the construction of an ultra-clear glass production plant, with products targeting Thailand, the Philippines and Singapore.

IRICO Electronics: The company sold shares twice, totaling 10 million, and obtained RMB76.40 million for development of solar PV glass and new electronic chemical materials.

China National Building Materials: The company has, in recent years, set foot in ultra-clear PV glass, TCO glass, etc, and built dozens of ultra-clear PV glass. In Sep. 2014, Bengbu Design & Research Institute for Glass Industry of CNBM acquired Avancis under France Compagnie de Saint Gobain, which manufactures thin-film solar cell and CIGS thin film cell, to further promote thin film solar industry chain.

Global and China Photovoltaic Glass Industry Report, 2014-2018 by ResearchInChina covers the following:

- Policy environment and industry environment for the development of global PV glass industry;
- Global and Chinese PV glass market size, market demand of main products, competitive landscape;
- Status quo of global and China solar cell and solar module market;
- Operation, revenue structure and layout in China of 5 foreign PV glass companies;
- Operation, revenue structure and competitive landscape of 18 domestic PV glass companies

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