

2007 China Solar Grade Wafer or Ingot Industry Research Report

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Contact:Mr zhang dong 8610-64836516 86-13811796901 sales@qyresearch.com

Summary

According 《2007 China solar grade wafer or ingot industry research report》 data,2006 China Solar Silicon Wafer Shipment was 399.4 MW,Increased 177.6% than 143.9MW in 2005,and hopefully reach 927.6 MW in 2007,increase 132.2% than 2006.

Though It was a rapid growth of Solar Wafer Shipment,It was less than its downstream solar cell Increasing,Thus cute the continue shortage of Solar wafer,what is more, due to the increasing price of Polysilicon and shortage of wafer, wafer selling price increase to 2.25 USD/W in 2006 from 2.15USD/W in 2005. and 2.38 USD/W in 2007H1,we estimate the trend will continue in 2007H2 and the ASP of 2007 will reach 2.40USD/W.

About the supply and demand, the shortage of wafer is 16MW in 2005,140 MW in 2006,and will expand to 180MW in 2007,according 《2007 China solar grade wafer or ingot industry research report》 forecast,2008 and the coming years will continue short of wafer. However, Solar cell module price will continue decrease in the coming years, so that will bring some price Decrease(not large) of wafer.

As the continue shortage of wafer and great increase of downstream demand,more and more investor enter wafer industry and the wafer manufacture also expand their capacity rapidly, Though capacity expanding is easy, wafer shipment increase is not easy as the continue shortage of polysilicon.

2006 solar multi crystal silicon wafer shipment was 110MW, while single crystal silicon wafer shipment was more than 280MW, single crystal silicon wafer is a lot more than multi crystal silicon wafer shipment,it is great different than then the international situation as multi crystal silicon wafer shipment almost twice of single crystal silicon wafer shipment. China local single crystal silicon wafer was 2.7times of multi crystal silicon wafer shipment. The most important reason of this situation is single crystal silicon wafer is easy manufacture than multi crystal silicon wafer as the key equipment pulling machine is easy bought in China with a low cost

while multi crystal DSS furnace only can buy from oversea market with a high cost..but this situation will change in 2012, according 《2007 China solar grade wafer or ingot industry research report》 forecast,2012 China local multi crystal silicon wafer shipment will be 1.5 times of single crystal silicon wafer shipment,the change mainly due to some very large multi crystal wafer projects and downstream clients demand as multi crystal silicon wafer is cheap and good enough.

2006 China wafer revenue was 899 million USD, increased 191% from 309 million USD in 2005. while 2007 revenue will increase 148% reach 2226 million than 2006,and it will keep a high increasing rate in the coming years. About utilization, Due to the polysilicon shortage, total utilization of China wafer less than 50% though the downstream demand is large. The Utilization will increase step by step in the coming years and will reach 60% or so according the forecast from 《2007 China solar grade wafer or ingot industry research report》 .

China as the biggest solar cell manufacture base,Most of wafer were sold to the local clients,but also has about 20% sells to the oversea market,Taiwan is the biggest sells region in the oversea market, Europe Union,USA,Kore,Japan also have some demand. about Rae materials, as polysilicon shortage and most polysilicon manufacturer order are full till the end of 2008, so, almost all the raw materials were from renewable material or high price spot market polysilicon.Some large and famous manufacturers(such as Jinglong LDK Yingli Solar Trina Solar etc)signed some long term polysilicon supply contracts, but most of the contract can not supply polysilicon before 2009. so rewevable material and high price spot market polisilicon will be the major raw material in China local wafer industry. By the way, almost all Wafer manufacturers net income rate is higher than cell suppliers, some companies' net income rate is more than 30%; this bring a lot of new enter as most equipment vendors can offer one stop sales of wafer factory solution. Investors who have capital, downstream clients,and also have relationship with some upstream raw material vendors will enter this industry, in fact, almost all large and big wafer project were occurred during 2005-Aug,2007. and will also some new enter in the coming years. thus the competition of China wafer industry will be serious. Research Team suggest that new enter who owned raw material will own great advantage in the competition.

《2007 China solar grade wafer or ingot industry research report》 is a report mainly introduce China solar wafer industry chain,the report included wafer upstream industry contents as:polysilicon raw material sources,Furance(ingot pulling machine DSS furnace),wire saw equipments(squarers wire saws)sources and quantity.Ingot wafer industry contents as:ingot wafer supply shipments sales demand price revenue net income capacity and capacity expanding information, equipment information of manufacturers etc;downstream clients contents as: market demand of wafer,downstream clients by manufacturer,regional revenue and market share etc.Through the detail survey and research of the whole wafer industry chain, the report can show a deep and excellent introduction about China wafer industry and will fit for investor marketing and strategy planning of the company.

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