

Global Market of Solar Cell Materials and Components: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study the global market of solar cell materials and components with the following conditions:

1. Research period: February to June, 2013
2. Research target: Manufacturers of solar cells and modules, solar cell materials
3. Research methodologies: Face-to-face interviews by the specialized researchers

What are Solar Cells and Solar Cell Components?

The solar cells in this research indicate solar cell modules made with crystalline silicon, thin-film silicon, chemical compound (CIGS, CdTe, etc.), organic thin films, dye-sensitized. The solar cell materials or components in this research indicate cover glass, seal materials, back sheets, raw Si, TCO glass, sputtering target, sensitizing dye, and etc.

◆ Key Findings

■ Global Market of Solar Cell Materials and Components in 2012 Estimated to Attain 31.97GW, 104.9% of Previous Year, Which Expected to Expand to 63.45GW by 2020

Size of the global market of solar cell materials and components in 2012 have reached 31.97 GW, 104.9% of that in the previous year based on the shipment capacity from manufacturers. This rising tendency is likely to continue because enthusiastic demands can be expected throughout the world, though the regions and countries of major suppliers may alter from time to time. The market may be able to attain two-digit growth, leading to 63.45GW by 2020.

■ Despite China's Rising Influence as a Producer of Solar Cells Materials, Japanese Manufacturers Compete by Developing New Materials and Technologies

In recent years, solar cell materials and components from China are increasing in the global market, supplying products with low price and improved quality to the market. This has raised the percentage of market share from China especially for the global sales of seal materials and back sheets. As for cover glass sold in China, the domestic market share reached 100%. These tendencies seem to have drastically reduced the sales of manufacturers from U.S., Europe and Japan, who are in the middle of difficult sales environments, where more and more products being forced to reduce their prices due to price reduction in solar cells. On the other hand, solar cell manufacturers are taking differentiation strategies to breakthrough ever-severe market competition. Therefore, there are growing numbers of Japanese manufacturers of solar cell materials and components attempting various product developments using new materials and technologies to respond to expectation from solar cell manufacturers.

◆ **Report format:**

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Price: 126,000 yen (6,000 yen of consumption tax shall be charged for the sales in Japan.)

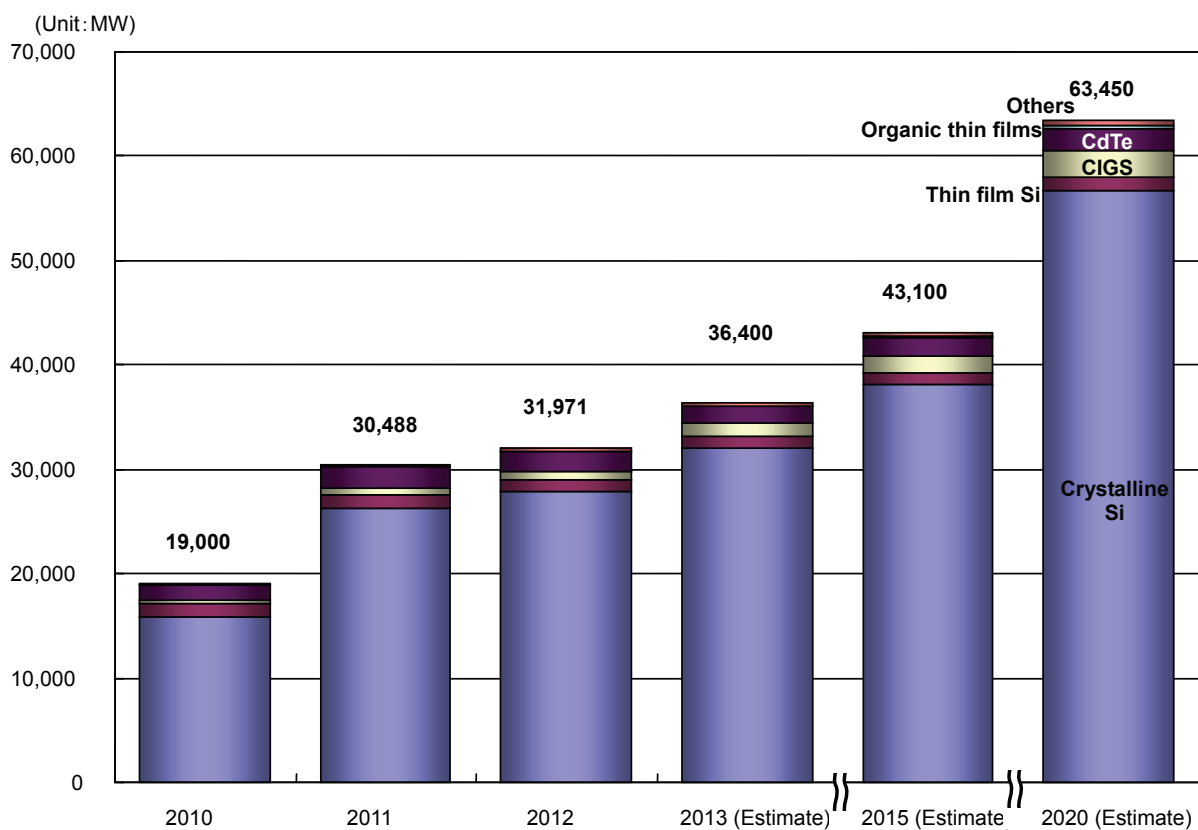
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■ **Figure1: Transition and Estimated Size of Global Market of Solar Cell Modules by Type**



Notes:

1. The figures are based on shipment capacity from manufacturers
2. “Others” include dye-sensitized and other solar cell modules.

Estimated by YRI