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The Roadmap of China PV Development (2015 & 2020)

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Outline

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1、 Introduction

- ◆ China PV industry develops fast in recent 10 years , the solar cell/module production has been lying in the top of the world for 5 years since 2007.
- ◆ In contrast, The PV market in China development is slow.
- ◆ Implementing “Feed-in tariff law” is the fundamental measure for solution of unbalanced development between PV manufacturing industry and PV market.
- ◆ PV power generation has shown its technological mature and great vitality. PV industry has broad prospects, even though the road of is not flat, big development trend will not change.

2、 China PV industry development status

2.1 Solar cells/modules

21.157GW_p — The output of solar cells in China in 2011,
20.592 GW_p —C-Si cells , **0.565 GW_p** —Si-thin Film cells,
21.265 GW_p —the output of PV modules in China in 2011.

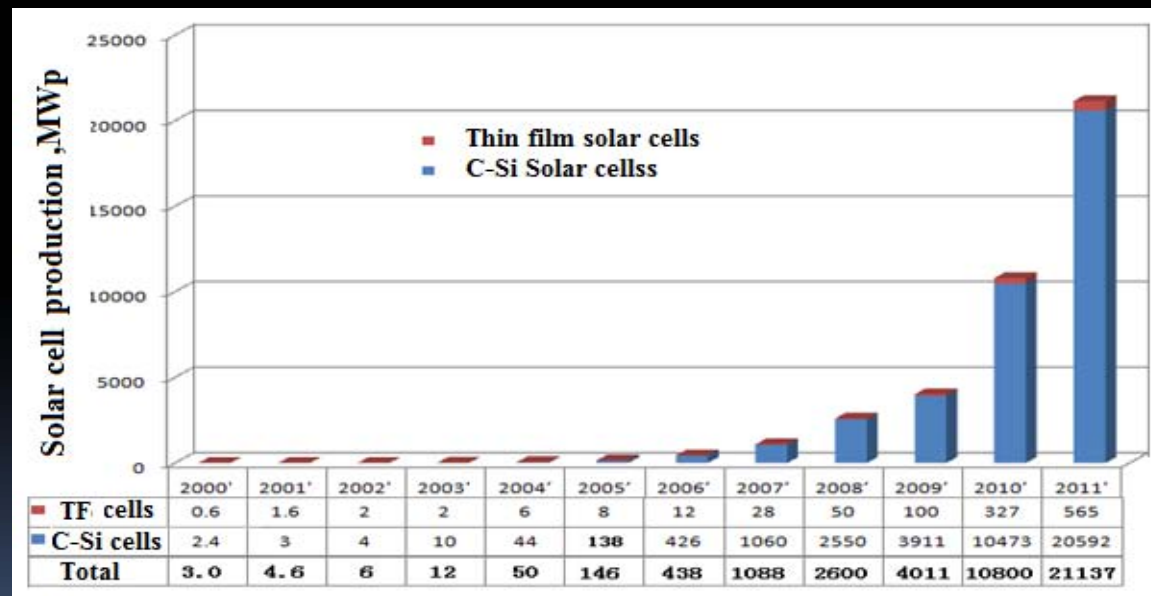
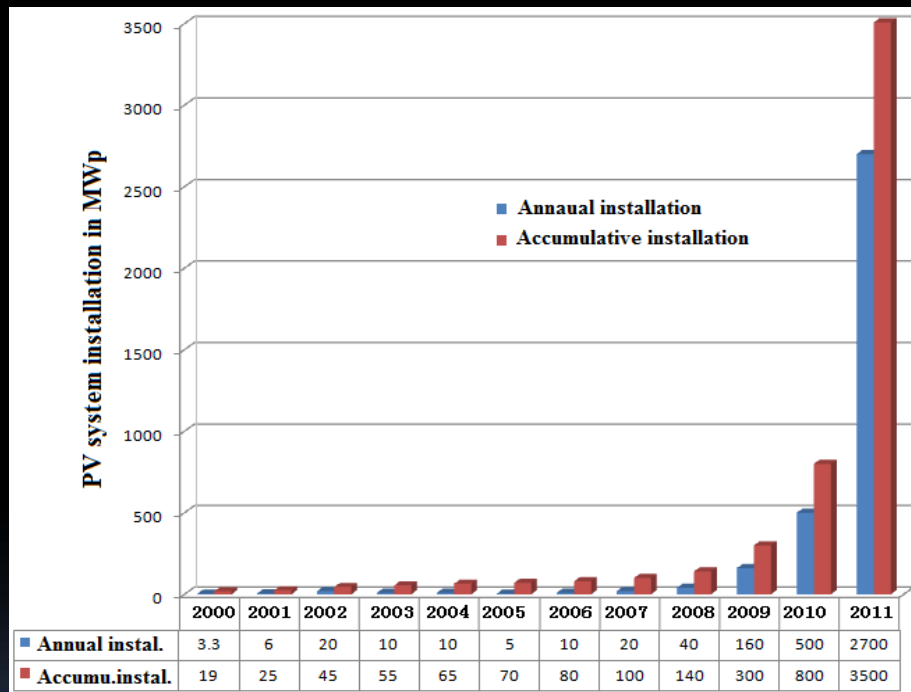


Fig.112000~2011 Solar cell production in China

2.2 PV market

(1) PV market development in recent years



◆ **2.7GWp PV** — completed PV system installation 2.2GWp with grid) in 2011. Comparing with 0.5GWp installation in 2010, growth rate reached **440%**.

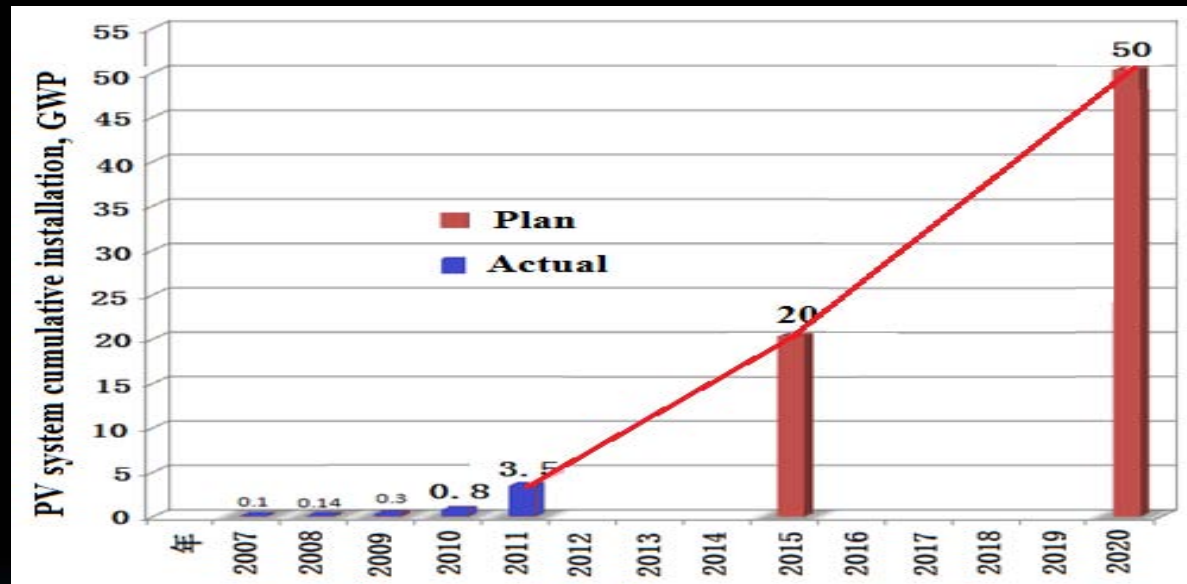
◆ **Driving policies** —

- “Golden Sun Demonstration Project” issued by M F and MST in march 2009,
- “Feed-in tariff law” issued by NDRC in July 2011.

Fig 2. Annual and cumulative installation of PV systems in 2000-2011 in China

3、 The goal of PV Market in China

(1) The goal of PV market in 2015 and 2020



The year	2011	2015	2020
PV cumulative installation, Wp	3.5GWp	20GWp	50GWp
PV power , GWh	4550	26000	65000
PV ratio	~0.1%	~0.5%	~1%

The Roadmap above (2015 & 2020) is guidance for PV development, not with binding force, the goal is conservative, it is entirely possible to surpass.

(2) The study of 2050 high proportion of RE in China is underway supported by World Energy Fund and NEB.

PV market has a broad prospects In China !

4、 The measures for promoting PV Market

- ◆ “Golden Sun Demonstration Project” issued by M F and MST in march 2009;
- ◆ “Feed-in tariff law” issued by NDRC in July 2011, (1.15 ¥/kWh in 2011, 1.0 ¥/kWh in 2012);
- ◆ “Distributed PV power generation demonstration Area Project” by NEB in Oct.2012.

5、 summery

- ◆ China PV manufacturing industry develops very fast in recent 10 years , but not balance with PV market.
- ◆ Policies and regulations need to be further improved for driving PV market .

Many thanks !