

Solar glass overcapacity





Overview

How will China's new guidelines reshape the solar industry?

In November 2024, China's Ministry of Industry and Information Technology released revised guidelines for the photovoltaic (PV) industry. The new guidelines are set to reshape the solar manufacturing industry, addressing overcapacity, pricing volatility and inefficiency across the value chain.

How will new regulations affect the solar industry?

While existing polysilicon, wafer, cell, and module manufacturing capacity largely aligns with the new regulations, emerging manufacturers and new expansions will be the most impacted. These changes will catalyse consolidation, market shifts and ultimately lead to a more efficient and sustainable solar industry. What are the key changes?

1.

Will polysilicon oversupply impact the PV industry in 2025?

Going into 2025, industry participants expect the oversupply of polysilicon to continue to weigh on the market, causing significant financial strain and widespread losses across the industry, Fastmarkets heard during an industry forum that took place on December 25. "The PV industry started its downward trend from the end of 2023.



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Analysis-China's overcapacity crackdown faces litmus test in solar

BEIJING (Reuters) -China's efforts to curb industrial overcapacity face their first test in the indebted and bloated polysilicon sector, a key cog in solar cell production, where ...

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[Polysilicon, PV glass manufacturers cut production to tackle ...](#)

Meanwhile, China's leading PV glass manufacturers are reportedly coordinating a 30% production cut in July. Get smart: Coordinated production cuts are welcome, but they do ...

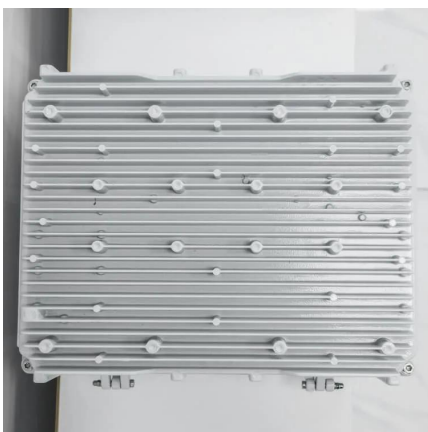
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[Overcapacity To Persist In Solar Manufacturing Through 2027](#)

Overcapacity is here to stay The year 2024 was also a defining year for the solar industry, thanks to significant overcapacity in this space that ensured prices fell sharply, ...

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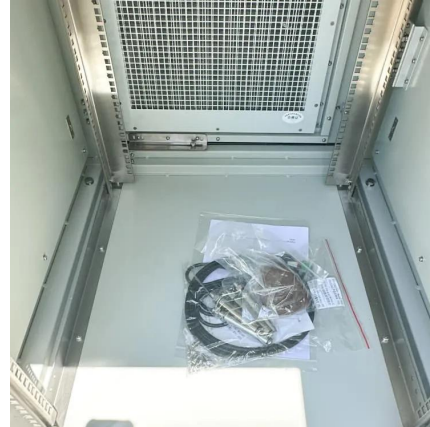
[Big Chinese Solar Glass Makers Confirm Output Cuts Amid ...](#)

(Yicai) Sept. 5 -- Major Chinese producers of photovoltaic glass confirmed that they are idling furnaces to reduce output in response to a severe supply glut, but industry insiders are



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[China Says Solar Sector Needs To Curb Overcapacity](#)

Overview: China's industry ministry convened a meeting with solar industry representatives on August 18, 2025, marking the second such gathering in two months, to ...

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[Photovoltaic glass leaders: collectively reduce production by ...](#)

Recently, China's photovoltaic glass market has received important news. In order to deal with the current imbalance between supply and demand and overcapacity in the ...

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[China signals reform to halt solar overcapacity and price wars](#)

Ten glass producers, including Xinyi Solar and Flat Glass, plan to cut output by 30% in July. In the polysilicon segment, companies like GCL Technology and Daqo New Energy ...

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