Solar technology export controls:
China proposes restrictions on know-how use in overseas solar factories

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China proposes export controls on 12 PV manufacturing technologies

MANUFACTURING STAGE

TECHNOLOGY

TREATMENT IF ADOPTED:

Prohibited

Restricted/ license

POLYSILICON — Trichlorosilane cold-hydrogenation fluidized-bed process

POLYSILICON — Silane fluidized-bed process

WAFERS — Ultra-thin silicon wafer preparation

SOLAR CELLS — Crystalline-silicon cell edge-passivation

SOLAR CELLS/ MODULES — Perovskite and tandem cell/module production

POLYSILICON — Polysilicon engineering technology

POLYSILICON — Reduction-furnace process

INGOTS/ WAFERS — Monocrystalline ingot pulling

INGOTS/ WAFERS — Monocrystalline ingot machining

WAFERS — Large-format / ultra-thin wafer slicing

SOLAR CELLS — High-efficiency TOPCon and XBC cell preparation

SOLAR CELLS — Heterojunction (HJT) cell preparation

Source: MOFCOM/MOST, Announcement No. 48

Weekly
Facts &
Figures.

- **Wafer vs. module gap:** China held 96.4% of global solar-wafer capacity in 2025, compared with 76.2% for modules, a 20.2-percentage-point gap reflecting greater overseas expansion in panel assembly.
- **Proposed export controls:** On 16 October, MOFCOM and MOST proposed prohibiting exports of five solar-manufacturing technologies and requiring government approval for seven others. Pre-export registration already applies to specified transfers.
- **Overseas investment exposure:** China's registration requirements also cover specified technology transfers to Chinese firms' overseas joint ventures, potentially affecting projects such as TCL Zhonghuan's and JinkoSolar's solar factories in Saudi Arabia.

What
This
Means.

"Building solar capacity outside China can reduce reliance on imported panels. But non-Chinese production often still need Chinese technology and engineering support to improve production. The proposed export controls could make some of those transfers subject to Beijing's approval."



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Start the conversation.

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