

# Photovoltaic cancels energy storage quota

Should PV companies reduce or cancel export rebates?

The China Photovoltaic Industry Association stated that reducing or canceling export rebates "helps promote rational price recovery in overseas markets." Nearly 60 PV companies agreed during their annual meeting to strengthen self-discipline and maintain market order. Translation: Stop the price war. Return to profitable operations.

How will the energy storage mandate impact China?

S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand. With China accounting for around 56% of the global energy storage demand in 2024, the impact of such a policy change will be massive.

How will China's Export tax rebate affect the solar industry?

The end of China's export tax rebate. Starting in Q4 2025, China will scrap its 13% VAT export rebate on solar modules and storage systems. This fiscal change will ripple through global pricing since China supplies over 80% of the world's solar modules and 90% of lithium iron phosphate (LFP) battery packs.

Is the energy storage mandate a big change?

This is a big change towards rationalization of renewables but hidden within that is a removal of the energy storage mandate," George Hilton, research and analysis manager at S&P Global, tells ESS News. S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand.

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New renewable energy plants in China will no longer be required to build storage in order to secure development rights and grid connection. Since introduced in 2022, policy mandates ...

The photovoltaic cancels energy storage quota movement isn't about abandoning batteries altogether. It's like switching from arranged marriage to dating apps - more flexibility, better ...

Bottom line is, ultra-cheap solar and storage gear is on its way out. The next phase of the energy transition will likely come with higher but more sustainable prices.

These requirements have helped mitigate renewables curtailment in China. However, they have also increased operational costs for renewable energy projects, and many project owners ...

On January 8, China announced a major export tax adjustment: VAT export rebates for photovoltaic (PV) products will be fully cancelled from April 1, 2026, while battery product rebates will ...

Triple Revolution in Photovoltaic Energy Storage by 2025 On September 12, the National Energy

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Administration of China unexpectedly released the "Special Action Plan for Large-Scale ...

In a major policy shift towards electricity market liberalization, China has introduced contract for difference (CfD) auctions for renewable energy plants and removed the energy storage ...

China eliminates solar export tax rebates effective April 1, 2026. Module prices forecast to rise 10-15%. Get the complete analysis and pricing outlook.

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