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LCD panel makers gear up thin-film solar deployment

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The rumored attendance of AU Optronics (AUO) president and COO at an upcoming photovoltaic (PV) show in Spain has once again spurred speculation about Taiwan LCD panel makers' deployment in the sector.

Industry sources indicated that Lai-Juh Chen, president and COO of AUO, is going to attend the Solar Energy Conference (September 1 to 4) at Feria Valencia in Valencia, Spain. Since AUO has held a low profile over its deployment in the PV sector, Chen's rumored presence at the show is fueling speculation about a potential strategy change at the panel maker.

However, executives from AUO claimed no knowledge about the speculation.

The sources indicated that the unclear strategy the company has for the PV sector has prompted many thin-film solar cell R&D specialist to join other companies.

AUO rival Chi Mei Optoelectronics (CMO), on the other hand, has been more aggressive in its PV deployment. The company is said to be scheduled to have its first batch of equipment from Ulvac installed in September. The sources added that CMO is also considering deployment in tandem junction process.

Chunghwa Picture Tubes (CPT) has extended its presence to the PV sector via Green Energy Technology, which is also under the Tatung Group. Fabricating on Applied Materials' equipment, Green Energy will have its thin-film solar cells enter volume production in the fourth quarter of 2008.

Foxconn Electronics-invested Innolux Display, meanwhile, seems to have put the brakes on its plans after conducting equipment evaluations. Company executives believe the timing is not appropriate and production using turn-key equipment solutions is not competitive.

LCD panel makers have a competitive edge over other industries over deployment in thin-film solar cells, some industry watchers have commented. Given that panel makers are already big consumers of silane, one of the key materials for thin-film solar cell production, they are free from any material shortage concerns. Also, the similarities between panel and thin-film solar cell production is another advantage for panel makers, especially as the capital required for the later is less intensive as the former, they added.

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