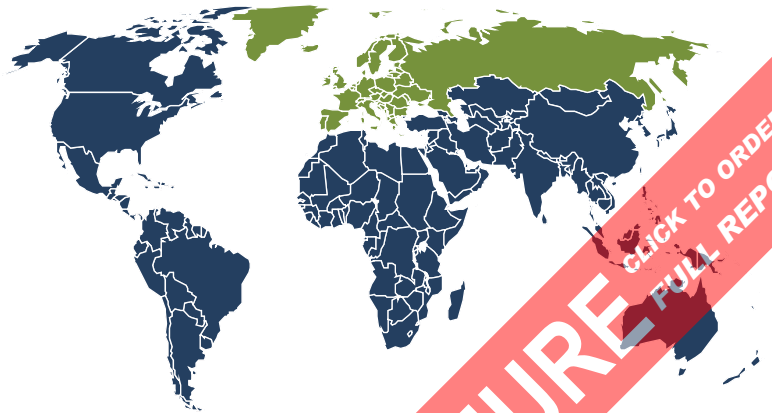




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Flat Glass: Europe

March 2020



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About This Report

Scope

This report forecasts to 2023 flat glass demand in square meters and nominal US dollars at the manufacturer level in Europe. Total European flat glass production is also forecasted to 2023 in square meters. Total demand by value is segmented by market in terms of:

- residential buildings
- nonresidential buildings
- motor vehicle original equipment manufacturer
- motor vehicle aftermarket
- other markets such as solar energy, electronic display screens, and aerospace equipment glass

To illustrate historical trends, total fabricated flat glass demand by value is provided in annual series from 2008 to 2018; total European flat glass production and demand in area terms, and the various demand segments by value are reported at five-year intervals for 2008, 2013, and 2018.

Production data reflect primarily float glass, but also include sheet glass, rolled glass, plate glass, and specialty types of flat glass such as patterned glass. Capacity figures include only float glass and, where noted, patterned glass.

Demand by market for fabricated flat glass is presented in US dollars. Fabricated flat glass includes both basic glass as well as processed and value-added products such as laminated, tempered, and insulating glass. Thus, the dollar values presented per square meter of flat glass include the inherent value added by fabrication.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 7 | Countries in Western Europe

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain*
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom*
France*	Isle of Man	Norway	Vatican City
Germany*	Italy*	Portugal	

*Major flat glass markets

Source: The Freedonia Group

Table 8 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Major flat glass markets

Source: The Freedonia Group

Sources

Flat Glass: Europe (FE60062) is based on *Global Flat Glass*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 9 | HS Codes Related to Flat Glass

HS Code	Definition
7005	Float glass and surface ground or polished glass, in sheets

Source: United Nations Statistics Division

Table 10 | NACE Codes Related to Flat Glass

NACE Code	Definition
23.11	Manufacture of flat glass

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

About This Report

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Global Flat Glass

Freedonia Industry Studies

Global Buses

Global Construction Aggregates

Global Construction Chemicals

Global Housing

Global Hybrid & Electric Vehicles

Global Industrial Silica Sand

Global Insulation

Global Siding (Cladding)

Global Windows & Doors

Insulation

Siding

Solar Roofing in the US

Window & Door Components

Windows & Doors

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Construction: United States

Global Demographics

Global Housing

Global Light Vehicles

Global Macroeconomy

Global Medium- & Heavy-Duty Trucks & Buses

Global Windows & Doors

Hybrid & Electric Vehicles: United Kingdom

Industrial Rubber Products: United Kingdom

Motorcycles: United Kingdom

Motor Vehicles: United States

Prefabricated Housing: United States

Recovered Glass: United States

Renewable Energy: United States

Windows & Doors: United Kingdom

Freedonia Custom Research

Trade Publications

Building Design & Construction

Glass International

Glass Magazine

USGlass

Agencies & Associations

British Glass Manufacturers' Confederation

Eurostat

Federal State Statistics Service (Russia)

Glass Alliance Europe

Glass for Europe

International Monetary Fund

National Glass Association

Organisation for Economic Co-operation and Development

Statistisches Bundesamt (Destatis – Germany)

United Nations Comtrade

World Bank