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World Flat Glass

Industry Study with Forecasts for **2014 & 2019**

Study #2715 | January 2011 | \$6200 | 363 pages

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Gains will be driven by favorable outlooks for the two key markets -- building construction and motor vehicles -- both of which are forecast to outperform the general economy.

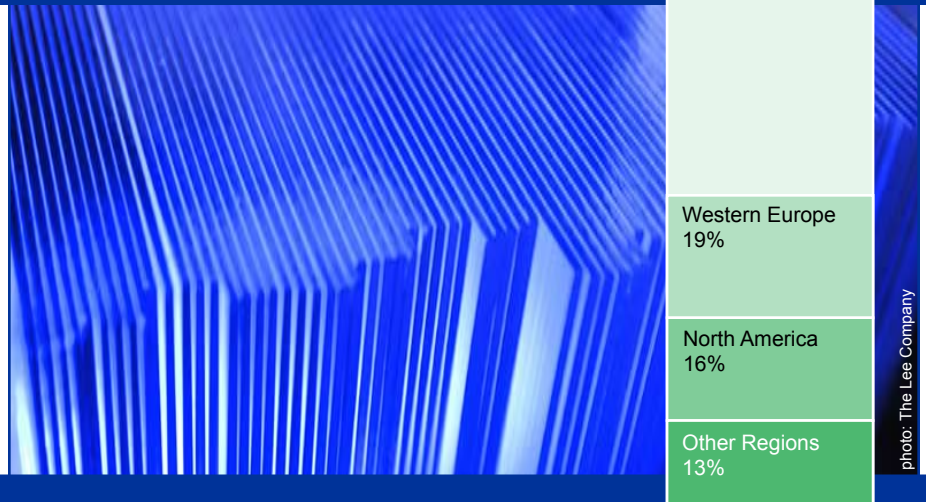
Global demand to rise 6% annually through 2014

World demand for flat glass is forecast to rise 6.0 percent per year through 2014 to 8.1 billion square meters. Maintaining the trend seen over the 1999-2009 period, demand will easily outpace real (i.e., inflation-adjusted) gains in the global economy. Gains will be driven by favorable outlooks for the two key markets for flat glass -- building construction and motor vehicles. Each of these markets is forecast to outperform the general economy through 2014. The global market value of fabricated flat glass is forecast to reach almost \$90 billion in 2014.

Fabricated flat glass demand to benefit from more expensive products

Gains will be spurred by continuing robust growth in the Asia/Pacific region, as well as by recovery in the building construction and motor vehicle industries in North America and Western Europe after recessionary conditions in 2009. In both developed and developing countries, fabricated flat glass will benefit from rapid growth in demand for more expensive products such as solar control glass, low-e glass, smart glass, self-cleaning glass and heads-up-display (HUD) windshields. In recent years, glass used in solar energy applications has witnessed surging growth in demand, a trend that will accelerate through 2014 due to increasing govern-

World Fabricated Flat Glass Demand, 2014 (\$89.3 billion)



ment support around the world for renewable energy. On a square meter basis, however, solar energy applications account for a very small share of global flat glass demand at less than 100 million square meters in 2009.

China to increase its market share of flat glass

China's share of world flat glass demand in square meters will rise through 2014, while the country's share of world fabricated flat glass demand in value terms will stand at a less significant but still impressive percentage. Basic unfabricated float glass continues to account for a disproportionate share of the overall Chinese flat glass market, but

the trend is increasingly shifting in favor of using fabricated flat glass. Other developing Asian countries such as India and Thailand will post particularly impressive gains, with growth aided by booming construction and motor vehicle sectors in both countries.

Demand in the US will post above-average gains, but this is due to the fact that domestic flat glass demand fell drastically in 2009 as a result of the country's major economic recession (and associated downturn in building construction spending and motor vehicle output). Demand in the mature markets of Western Europe and Japan will continue to post below-average gains through 2014.

Sample Text, Table & Chart

ASIA/PACIFIC

World demand for flat glass used in building construction is forecast to increase by 5 billion square meters in 2014, outpacing previous gains in building construction expenditures. The market for fabricated glass products is forecast to expand 7.2 percent per year through 2014. Construction is used almost entirely in the residential and commercial sectors at the level in 2009. The residential building construction segment includes such structures as single-family homes, condominiums, apartments and manufactured housing. The nonresidential building construction segment includes office and commercial buildings, industrial buildings, universities, schools, hospitals, religious buildings and libraries, and others.

**SAMPLE
TEXT**

In addition to the level of building construction expenditures, energy regulations play a major role in the demand for architectural glass. Other important determinants of potential flat glass demand in this market include the diffusion of new technology, such as improved generations of solar control glass; architectural design trends; and regional preferences related to home sizes and styles (including whether multiunit or single-family residential structures are the norm).

In addition to a strong outlook for the global construction industry, the market for architectural glass will benefit from the greater use of value added glazing products in both new structures and during renovation and refurbishment activities. While many of these activities have been the result of company-led research on the part of suppliers, customer concerns and governmental regulations related to energy conservation have also played a role. Similar to trends in the motor vehicle segment, one major product trend in architecture is increasing use of solar control glass, which is glass that is

45

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TABLE VII-8

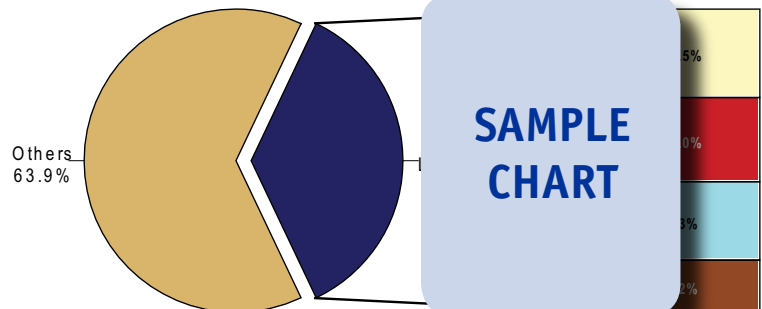
INDIA -- FLAT GLASS SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Population (million persons)					6
GDP per capita					0
Gross Domestic Product (bil 2008\$)					0
square meters flat glass/capita					4
square meters flat glass/mil \$ GDP					0
Flat Glass Demand (mil sq meters)					0
net exports					5
Flat Glass Production (mil sq meters)					5
square meters/metric ton					2
Flat Glass Production (000 metric tons)					50

**SAMPLE
TABLE**

CHART IX-1

WORLD FLAT GLASS SALES BY COMPANY (\$59.9 billion, 2009)

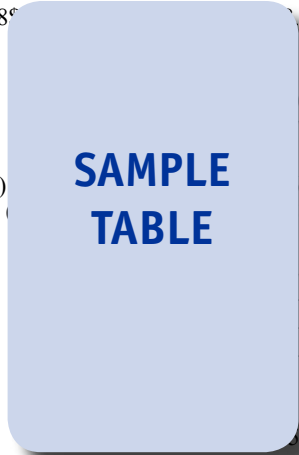


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VII-9
INDIA -- FLAT GLASS DEMAND BY MARKET

Item	1999	2004	2009	2014	2019
Building Construction Expend (bil 2008\$)					20
\$ bldg const glass/000\$ bldg const					8
Motor Vehicle Production (000 units)					0
\$ MV glass/motor vehicle					6
Manufacturing Value Added (bil 2008\$)					2
\$ other flat glass/000\$ MVA					0
Fabricated Flat Glass Demand (mil \$)					5
Building Construction					0
Motor Vehicle					0
Other Markets					5
\$ fabricated/square meter					8
Flat Glass Demand (mil sq meters)					0



COMPANY PROFILES

Interpane Glas Industrie AG
 Sohnreystasse 21
 37697 Lauenförde
 Germany
 49-5273-8090
 http://www.ir

SAMPLE PROFILE

Annual Sales
 Employment:
 Key Products
 soundproof and ... ivity (low-E),

Interpane Glas Industrie is a producer and processor of flat glass products. The Company is privately held.

The Company is involved in the world flat glass industry through the manufacture of climate, solar control, safety, low-emissivity (low-E), soundproof and triple-glazed glass. Climate glass, which is sold under the IPLUS SUN brand name, is designed to reduce solar heat.

Interpane Glas Industrie's IPASOL solar control glass is engineered to allow light transmission while reducing solar energy intake. Safety glass, which is marketed under the IPASAFE tradename, consists of a polyvinyl butyral film between two or more panes of glass. The Company's IPLUS E low-E glass is designed to enhance thermal insulation in commercial and residential building applications. Soundproof glass, which is sold under the IPAPHON brand name, features an asymmetrical construction, gas filling and the use of cast-resin glass or soundproofing foils. Interpane Glas Industrie's triple-glazed insulating glass, which includes IPLUS 3L and IPLUS 3CL types, is engineered to reduce heat loss and enhance energy efficiency in building applications.

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“Demand for flat glass in motor vehicles is also projected to advance strongly at 11.5 percent per year to \$845 million in 2014. Besides benefiting from a booming auto industry, the shift to higher valued glass in vehicles will promote value gains. The greater development of an automotive replacement glass market in India will be hindered by the country's low vehicle utilization rates, which stood at below 15 vehicles per thousand persons in 2009, among the lowest levels in the world. Nonetheless, ...”
 --Section VII, pg. 149

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OTHER STUDIES

World Insulation

This study analyzes the global insulation industry. It presents historical demand data for the years 1999, 2004 and 2009 and forecasts for 2014 and 2019 by insulation material (e.g., foamed plastic, fiberglass, mineral wool), market (construction; industrial, HVAC and OEM), world region and major national market. The study considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2707 February 2011 \$6100

Advanced Flat Glass

US advanced flat glass demand will rise 11.6% annually through 2014, driven by a rebound in residential construction and motor vehicle production. Consumption will also benefit from increasing market penetration of low-emissivity glass, heads-up display windshields, electrochromic mirrors, smart glass and other products. This study analyzes the \$4.1 billion US advanced flat glass industry, with forecasts for 2014 and 2019 by type and market. It also evaluates company market share and profiles industry competitors.

#2674 December 2010 \$4800

Windows & Doors

US window and door demand will rise 6.6% yearly through 2014. Plastic products will grow the fastest, driven by fiberglass entry doors and vinyl windows. Metal windows and doors will remain the top segment, supported by population growth in the South and West and by efforts in coastal regions to prevent storm damage. This study analyzes the \$22.7 billion US window and door industry with forecasts for 2014 and 2019 by material, market and region. It also evaluates company market share and profiles industry players.

#2699 November 2010 \$5100

World Housing

Global demand for new housing will rise 3% yearly to 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8% yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 September 2010 \$5300

Flat Glass in China

Demand for flat glass in China is forecast to increase 7.9% annually through 2013. Float glass will grow rapidly at the expense of lower quality sheet glass. High value fabricated glass (e.g., safety glass, insulating glass) will increasingly be used by consumers in place of lower value unfabricated glass. This study analyzes the 1.9 billion square meter flat glass industry in China, with forecasts for 2013 and 2018 by type, market and region. It also evaluates company market share and profiles industry participants.

#2584 January 2010 \$5200

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