INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Flat Glass in China

Industry Study with Forecasts for **2016 & 2021**

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Flat Glass in China

Industry Study with Forecasts for ***2016 & 2021***

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Flat Glass in China

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Sales of flat glass in China will be stimulated by growth in building construction expenditures, advances in the production of motor vehicles and solar panels, and increasing income levels.

Demand to grow more than 8% annually through 2016

Demand for flat glass in China is forecast to rise 8.2 percent per year through 2016 to 3.4 billion square meters. Sales of flat glass will be driven by growth in building construction expenditures and advances in motor vehicle and solar panel production. In value terms, flat glass demand is forecast to increase 13.9 percent per year to ¥250 billion in 2016. Ongoing industrialization, rising income levels, and further population and household growth will benefit flat glass sales.

Demand shifting to higher quality products

Two major trends are expected to affect the flat glass industry over the next 10 years. First, demand for float glass is forecast to increase at the expense of demand for lower quality sheet glass. Second, demand for fabricated flat glass products is forecast to continue to rise as they are more often favored over unfabricated products in building applications and as rapid growth is expected in fabricated glass markets such as solar energy and electronic displays. By 2021, fabricated flat glass will record nearly half of total flat glass demand in China.

Fabricated glass products to grow most rapidly

Unfabricated float glass will remain the largest product category through 2016, with demand rising 6.6 percent yearly to 1.5 billion square meters. Advances will be spurred by healthy growth in building construction activity, especially in rural areas, and relatively low product prices.

Demand for safety glass will advance nearly 15 percent annually through 2016, as demand benefits from rising income levels and growth in new construction, as well as from greater output of motor vehicles, solar panels, and furniture. Demand for insulating glass is forecast to grow 15.5 percent annually through 2016, boosted by growth in construction of residential and commercial buildings, schools, and hospitals, which use vast amounts of flat glass in their designs.

Architectural market still dominant for flat glass

The architectural market accounted for just under four-fifths of flat glass demand in 2011. Advances for flat glass in the architectural market will be bolstered by rising income levels, further urbanization, and government efforts to improve living conditions for low-income earners. The solar panel market is forecast to see the fastest gains through 2016. Sales will be driven by strong increases in production of solar panels. The electronic display market will see the next fastest growth, with demand being lifted by expanding output of electronic goods in China, the presence of new glass-using products, and heightened personal income levels.

Sample Text, Table & Chart

TABLE V-1

FABRICATED FLAT GLASS SUPPLY & DEMAND IN CHINA
(million square meters)

Item	2001	2006	2011	2016	2021
Building Constr Expend (bil 2010¥)	1				
sq m fabricated/mil ¥ construction					
Fabricated Flat Glass Demand					
Safety Glass					
Insulating Glass					
Mirrors					
Other Fabricated					
¥/sq m					
Fabricated Flat Glass Demand (mil ¥)					
+ net exports					
Fabricated Flat Glass Shpts (mil sq m)					
sq m primary/sq m fabricated					
Primary Flat Glass used in Fab (mil sq m)					

SAMPLE TABLE

PRIMARY FLAT GLASS

Unfabricated Applications

Float glass used in unfabricated applications is defined a[s] without any deep processing after cooling from its molten sta[te] fabricated float glass demand reached 1.1 billion square mete[rs] Demand rose 10.6 percent annually over the 2006-2011 perio[d] by rising building construction expenditures. Single pane wi[n] the architectural market account for most of the demand for u[n] float glass.

Unfabricated f... year through 2016 ... to provide affordab... sales will increase ... Sales will be drive... out of low-end floa... addition, the rising popularity of fabricated flat glass will hin[der] as an increasing portion of float glass will be fabricated. Residential and commercial buildings that previously used unfabricated float glass will shift toward fabricated products.

SAMPLE TEXT

Float glass can be clear or colored. It is directly used in windows and doors in many applications in China, with the architectural market accounting for more than 90 percent of total float glass demand in unfabricated applications in 2011. Float glass is more transparent than sheet glass. This advantage allows primary float glass to be installed in double panes in windows and doors. Float glass is widely utilized in northern China (especially in the Northeast), where double-pane windows are commonly installed in residential buildings. In addition, floa[t] also used as window glass among more price-conscious cons[umers] urban areas. The thicknesses of float glass used in windows a[...] China are about 3-5 millimeters. Float glass is directly used [...] picture frames, advertising signs, building decorations (e.g., ...

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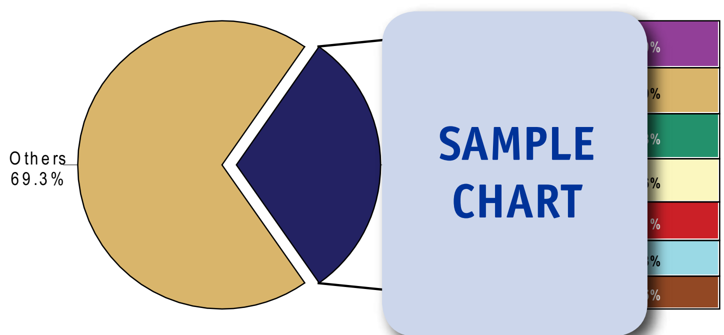
CHART VIII-1

FLAT GLASS MARKET SHARE IN CHINA
(130.5 billion yuan, 2011)



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Sample Profile, Table & Forecast

TABLE VI-5

MOTOR VEHICLE MARKET FOR FLAT GLASS IN CHINA
(million square meters)

Item	2001	2006	2011	2016	2021
Motor Vehicle Flat Glass Market					
By Segment:					
Original Equipment					
Aftermarket					
By Product:					
Safety Glass					
Insulating Glass					
Mirrors					
% motor vehicle					
Total Flat Glass Demand					

SAMPLE TABLE

COMPANY PROFILES

Nanning Float Glass Company Limited
No. 8, Zhuangjin Road
Nanning, Gua
China
86-771-483-
http://www.n

SAMPLE PROFILE

Annual Sales y company, 8/12)
Employment

Key Products ss

Nanning Float Glass is a privately held manufacturer of float, reflective, and other types of processed glass. The Company operates a plant in Nanning, China that has two float glass production lines wi a combined annual output of 225,000 metric tons. Products are sold the Asia/Pacific region, North America, the Middle East, and Europe.

The Company participates in the Chinese flat glass industry through the manufacture of float, reflective, and other types of glass. Float glass is available in thicknesses ranging from 3 millimeters (mr to 19 mm. In addition, Nanning Float Glass' float glass is made in cl types and colors such as dark green, blue-gray, bronze, light gray, an European gray. Reflective glass from the Company is designed to pr vide energy savings in a variety of decorative, furniture, and architec tural building applications. This reflective glass is offered in a range colors, including ocean blue, light blue, silver-blue, dark green, Frenc green, and dark gray. Other types of glass manufactured by Nanning Float Glass comprise mirror and bending glass.

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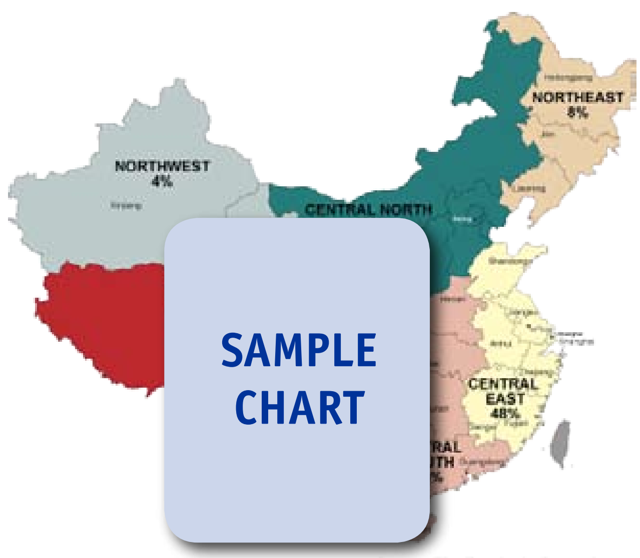
CHART VII-1

FLAT GLASS DEMAND IN CHINA BY REGION
(2.3 billion square meters, 2011)



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Other Studies

World Flat Glass

World demand for flat glass is forecast to rise 7.1 percent per year through 2016 to 9.2 billion square meters. The dominant Asia/Pacific region will continue to post the fastest gains. Fabricated flat glass demand will benefit from rapid growth in sales of energy efficient products such as solar control, insulation and low-E glass. This study analyzes the 6.6 billion square meter world flat glass industry, with forecasts for 2016 and 2021 by product, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#2970 .... January 2013 .... $6400

Windows & Doors

Demand for windows and doors in the US is forecast to rise 9.3 percent per year to $34.2 billion in 2016. Aided by a rebound in construction spending, the residential market will post double-digit advances in demand. Among material types, plastic windows and doors will see the fastest gains, while metal types remain the largest segment. This study analyzes the $18.6 billion US window and door industry, with forecasts for 2016 and 2021 by material, product, market and US region. The study also evaluates company market share and profiles industry players.

#2949 .... September 2012................ $5300

Construction Outlook in China

Construction expenditures in China will increase 8.8 percent per annum in real terms to 16.4 trillion yuan in 2016. Nonbuilding construction will be the fastest growing segment, benefiting from transportation infrastructure expansion and upgrades, and from the construction of utilities. Growth in residential and nonresidential building construction will also be strong. This study analyzes the 10.8 trillion yuan construction industry in China, with forecasts for 2016 and 2021 by type, market and region. The study also evaluates company market share and profiles industry participants.

#2898 .... June 2012 .... $5500

World Construction Aggregates

World demand for sand, crushed stone, gravel and other construction aggregates will rise 5.2 percent annually through 2015 to 48.3 billion metric tons. The Asia/Pacific market will grow the fastest, followed by Eastern Europe and the Africa/Mideast region. Recycled and secondary types will grow the fastest. This study analyzes the 37.4 billion metric ton world construction aggregates industry, with forecasts for 2015 and 2020 by product, market, application, world region and for 19 countries. The study also evaluates company market share and profiles industry players.

#2838 .... January 2012 .... $5900

World Siding (Cladding)

The global siding market is forecast to grow 4.8 percent per year through 2015 to over five billion square meters valued at $87 billion. Masonry and concrete products will remain the dominant segment, while vinyl siding exhibits the most rapid gains. The North American region, led by the US, will be the fastest growing market. This study analyzes the 4.2 billion square meter world siding industry, with forecasts for 2015 and 2020 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2834 .... December 2011 .... $6100

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