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# World Flat Glass

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

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Study #2970 | January 2013 | \$6400 | 374 pages

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*Demand will continue to outpace real (i.e., inflation-adjusted) gains in the global economy, with the dominant building construction market driven by growth in building construction activity.*

## World demand to rise 7.1% annually through 2016

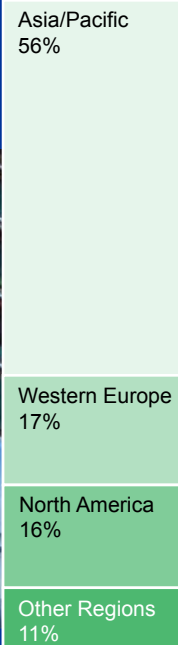
World demand for flat glass is forecast to rise 7.1 percent per year through 2016 to 9.2 billion square meters. In a continuation of the trend seen overall the last couple of decades, demand will easily outpace real (i.e., inflation-adjusted) gains in the global economy. Gains in the dominant building construction market will be driven by a significant acceleration in building construction activity. The global market value of flat glass is forecast to exceed \$90 billion in 2016.

## Asia/Pacific to remain fastest growing market

The Asia/Pacific region, which accounted for 60 percent of global flat glass demand (on a square meter basis) in 2011, will continue to post the fastest gains through 2016. Gains in China, the region's dominant national market, will slow in comparison to the pace of the 2006-2011 period, but remain well above the world average. Demand in Japan will improve significantly, based on recovering domestic building construction and motor vehicle markets.

The US market for flat glass will recover strongly based on a healthy rebound in the country's building construction sector. Building construction spending in the US in 2011 was just a little over one-half of levels seen in 2006. Despite positive economic growth in 2010 and 2011 after a major recession, US build-

## World Flat Glass Demand, 2016 (\$90.2 billion)



ing construction witnessed further declines in both those years. However, some recovery occurred in 2012, and it appears that the worst is over.

Demand for flat glass in Western Europe will experience modest gains. A slow growing population, combined with a stagnant motor vehicle industry, will limit growth. A number of float glass plants in the region closed in 2012, suggesting that major glassmakers are shifting focus elsewhere.

## Energy efficient products to benefit fabricated glass

Fabricated flat glass demand will benefit from rapid growth in sales of energy

efficient products such as solar control, insulation, and low-E glass. The solar energy market, which was hurt by recent global economic weaknesses, will take off briskly once again. It should be noted, however, that demand for flat glass used in solar energy applications totaled just around 120 million square meters in 2011, so this is a niche market.

Production of flat glass is projected to reach 75.4 million metric tons in 2016, of which close to 70 million metric tons will be high-quality float glass. The remainder will consist of low-quality float glass produced primarily in China, as well as sheet glass and rolled glass.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Flat Glass Demand by Market

Despite having already multiplied fourfold between 2001 and 2011, India's market for fabricated flat glass is projected to grow nearly 12 percent per year to \$1.1 billion in 2016. Besides benefiting from a booming auto industry, the shift to higher-value glass in vehicles will promote value gains. The greater development of an automotive replacement glass market in India has been hindered by the country's low vehicle utilization rates, which stood at just 19 vehicles per thousand persons in 2011, among the lowest levels in the world. Nonetheless, vehicle sales in the country have expanded substantially over the past decade, creating a significant replacement market for windshields and side windows. Unlike China, India has not become a global manufacturing hub despite its similarly low-cost abundant labor supply. Consequently, demand for glass from other markets in India is limited by local production capacity.

**SAMPLE  
TEXT**

Architectural glass is projected to advance nearly 12 percent per year to \$1.1 billion in 2016. Demand for residential structures will benefit from efforts by the government to alleviate India's acute housing shortage, as well as rising income in the country's rapidly expanding middle and working classes. Demand for glass in commercial structures will benefit from the rapid industrialization occurring throughout India. The replacement of basic float glass with higher-value tempered, laminated, and insulated glass products will also accelerate.

Demand for automotive glass is projected to advance nearly 12 percent per year to \$1.1 billion in 2016. Besides benefiting from a booming auto industry, the shift to higher-value glass in vehicles will promote value gains. The greater development of an automotive replacement glass market in India has been hindered by the country's low vehicle utilization rates, which stood at just 19 vehicles per thousand persons in 2011, among the lowest levels in the world. Nonetheless, vehicle sales in the country have expanded substantially over the past decade, creating a significant replacement market for windshields and side windows. Unlike China, India has not become a global manufacturing hub despite its similarly low-cost abundant labor supply. Consequently, demand for glass from other markets in India is limited by local production capacity.

150

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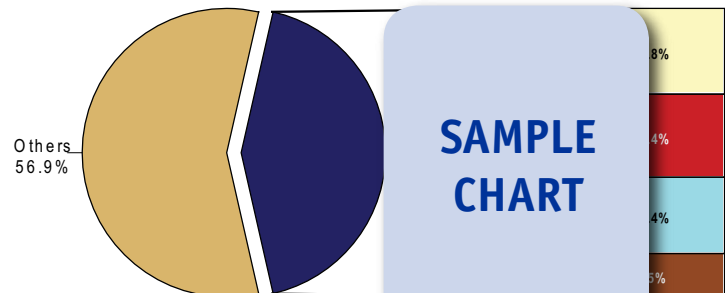
**TABLE VII-10**  
**INDIA:**  
**FLAT GLASS DEMAND BY MARKET**

Item	2001	2006	2011	2016	2021
Building Construction Expend (bil 2010\$) \$ bldg constr glass/000\$ bldg constr					
Motor Vehicle Production (000 units) \$ MV glass/motor vehicle					
Manufacturing Value Added (bil 2010\$) \$ other flat glass/000\$ MVA					
Fabricated Flat Glass Demand (mil \$) Building Construction Motor Vehicle Other Markets					
\$ fabricated/square meter Flat Glass Demand (mil square meters)					

**SAMPLE  
TABLE**

**CHART IX-1**

**WORLD FLAT GLASS MARKET SHARE**  
**(\$58.6 billion, 2011)**

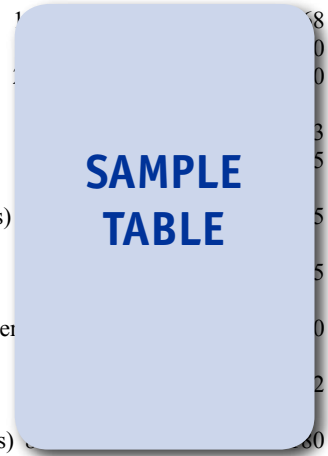


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VII-9**  
**INDIA:**  
**FLAT GLASS SUPPLY & DEMAND**

Item	2001	2006	2011	2016	2021
Population (million persons)	100	110	120	130	140
GDP per capita	100	150	200	250	300
Gross Domestic Product (bil 2010\$)	100	150	200	250	300
square meters flat glass/capita	0.22	0.22	0.22	0.22	0.22
square meters flat glass/mil \$ GDP	0.0022	0.0022	0.0022	0.0022	0.0022
Flat Glass Demand (mil square meters)	22	24	26	28	30
net exports	0	0	0	0	0
Flat Glass Production (mil square meter)	22	24	26	28	30
square meters/metric ton	100	100	100	100	100
Flat Glass Production (000 metric tons)	220	240	260	280	300



**COMPANY PROFILES**

**Euroglas GmbH**  
 Dammühlen weg 60  
 39340 Haldensleben  
 Germany  
 49-3904-638-  
 http://www.eu

**SAMPLE PROFILE**

Annual Sales:  
 Employment:  
 Key Products: control, antireflec-  
 tion, and fire r

Euroglas is a manufacturer of float and other glass products. The Company is owned by Glas Trösch Holding AG (Switzerland).

Euroglas is involved in the world flat glass industry via the production of float, laminated safety, coated solar control, antireflection, and fire resistant glass. The Company's float glass is sold under the EUROFLOAT and EUROWHITE brand names. EUROFLOAT is available in thicknesses of three to 12 millimeters (mm) and EUROWHITE is an extra white variety that provides high transparency in decorative and photovoltaic end uses. The Company produces laminated safety glass under the EUROLAMEX brand name. This glass features a polyvinyl butyral interlayer between two glass panes and is used in residential building applications.

Coated solar control glass produced by Euroglas comprises the SILVERSTAR product line. Specifically, Euroglas manufactures the SILVERSTAR COMBI high performance types that feature super thin coatings to reduce solar energy transmittance while providing high light transmission; SILVERSTAR SUNSTOP T temperable glass; and

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"Demand for flat glass in India totaled 270 million square meters in 2011, which represented per capita demand of just 0.22 square meters. This level is among the lowest in the world, and reflects India's underdeveloped economy and low per capita income rates in spite of over a decade of robust economic growth. While flat glass demand in India continues to rise at rates well in excess of the global average, the country's flat glass market will remain underdeveloped by global standards over the short term. Moreover, ..."  
 --Section VII, pg. 149

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**OTHER STUDIES**

**Insulation**

US demand for insulation is projected to advance 7.6 percent annually to \$10.3 billion in 2017. The residential market will see double-digit annual gains based on a strong rebound in housing starts. Fiberglass insulation will remain the market leader and grow the fastest, followed in growth rates by reflective/radiant and cellulose types. This study analyzes the \$7.1 billion US insulation industry, with forecasts for 2017 and 2022 by product, market and US region. The study also evaluates company market share and profiles industry players.

#3109 ..... November 2013 ..... \$5300

**World Windows & Doors**

Through 2017, global demand for windows and doors is expected to rise 7.1 percent annually to \$223 billion. China was the world's largest window and door market in 2012, and will see its share of global demand rise to 36 percent of the total in 2017. Plastic window and door products will see the fastest demand gains worldwide. This study analyzes the \$158 billion world window and door industry, with forecasts for 2017 and 2022 by product, material, market, world region, and for 21 countries. The study also evaluates company market share and profiles industry players.

#3039 ..... June 2013 ..... \$6400

**Prefabricated Housing**

US demand for prefabricated housing is forecast to expand 15 percent annually through 2017 to 135,000 units. Manufactured housing will remain the most common type, while other prefabricated housing such as modular, precut and panelized housing will grow the fastest. The South will remain the leading US regional market. This study analyzes the 67,000 unit US prefabricated housing industry, with forecasts for 2017 and 2022 by product and US region. The study also evaluates company market share and profiles industry competitors in the US market.

#3001 ..... February 2013 ..... \$4900

**Green Building Materials**

US green building materials demand is forecast to increase 11 percent annually to \$86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the \$51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 ..... February 2013 ..... \$5100

**Flat Glass in China**

Demand for flat glass in China is projected to increase 8.2 percent per year through 2016 to 3.4 billion square meters. Safety glass and insulating glass will be the fastest growing flat glass types. Solar energy and electronic displays will be the fastest growing markets, while the architectural market remains dominant. This study analyzes the 2.3 billion square meter flat glass industry in China, with forecasts for 2016 and 2021 by type, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2930 ..... November 2012 ..... \$5400

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- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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