

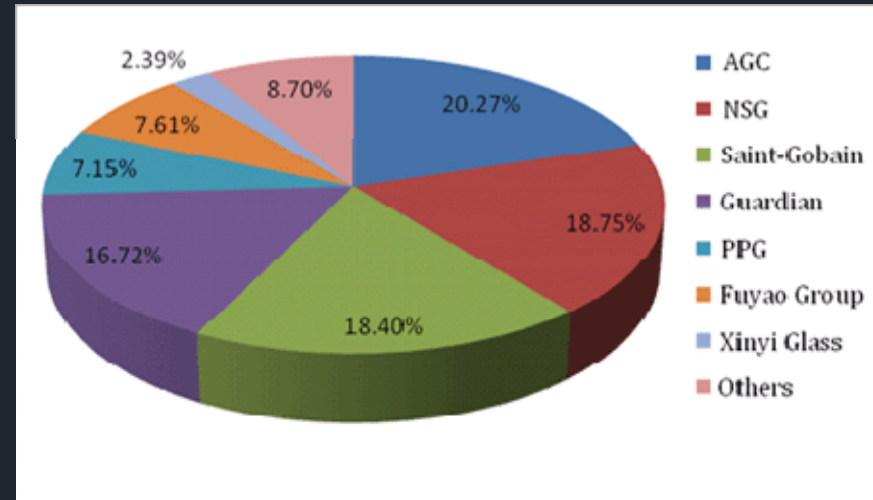
Global and China Automotive Glass Industry Report, 2009



With the recovery of global economy, the world's automobile industry which ever suffered a lot rebounds slowly. China has become the largest automobile market all over the world, and Chinese auto glass industry maintains quite a rapid growth. In a relative sense, glass industry is a mature and relatively stable sector. Glass, due to its fragility, is distributed by sales radius, for instance, around 200 km for the marketing of automotive glass.

There is a rather high concentration degree in global automotive glass market. Asahi Glass, a subsidiary of Mitsubishi Group, is the largest glass company around the globe. This is because of considerable output of Japanese automakers and peculiar closeness of Japanese companies. NSG ranks second from previously the eleventh by acquiring a British glass maker Pilkington, from which auto glass business of NSG is derived, but its operating efficiency still desires to be much improved, and it suffers heavy losses, even its sales revenue drops strikingly.

Market Shares of Major Automotive Glass Manufacturers in the World, 2009



France-based Saint-Gobain ranks third, and it belongs to Top 500 in the world, with the annual revenue of nearly EUR40 billion, but its glass business only takes a small portion. Saint-Gobain cooperates with South Korean enterprises closely. The rapid development of Hyundai-KIA brings much sales revenue to Saint-Gobain. Next, the USA-based Guardian ranks fourth, and it is the third largest private company in the world, but with information rarely disclosed; Guardian seldom expands production and has not yet established any production base in China.

PPG ranks fifth, a well-known paint company in the world. In 2008, it got rid of its loss-making auto glass business, but it still holds 40% stake. Fuyao Group occupies a dominating position in China since its well-developed marketing network. Xinyi Glass focuses on export and after-sale market, and its OEM clients are mainly Chery and JAC. It is worth mentioning that the fifth largest glass company Taiwan Glass has invested US\$120 million to establish an automotive glass production base in Yancheng with Kia recently.

Supply of China Automotive Glass Industry

Manufacturer	Client
AGC Automotive Glass (China) Co., Ltd.	FAW-Volkswagen, FAW-Xiali, FAW Toyota, Beijing Jeep, Guangzhou Honda, Sichuan FAW Toyota, Zhengzhou Nissan, Beijing Benz, BMW Brilliance,
AGC Automotive Glass (Foshan) Co., Ltd.	Guangzhou Toyota, Guangzhou Honda, Nissan Huadu
Changchun Pilkington	FAW-Volkswagen, BMW Brilliance, Beijing Benz
Guilin Pilkington	Liuzhou Wuling, Liuzhou Automobile, Jiangxi Changhe, Guilin Daewoo, Hunan Changfeng
Wuhan Yaohua Pilkington	Dongfeng Nissan, Dongfeng Citroen, Dongfeng Honda, BYD
Shanghai Yaohua Pilkington	Shanghai Volkswagen, SAIC Motors, Shanghai General Motors
Xinyi Glass	Chery, Foton, Yutong
Chongqing Fuyao Glass	Changan Automobile, Changan Ford Mazda, Changan Suzuki, Liuzhou Automobile, SAIC-GM-Wuling, Sichuan FAW Toyota, Lifan Auto, BYD
Changchun Fuyao Glass	FAW-Volkswagen, Beijing Benz, BMW Brilliance,
Beijing Fuyao Glass	Beijing Automotive Group, Great Wall Motor
Shanghai Fuyao Glass	Shanghai Volkswagen, SAIC Motors, Shanghai General Motors, Geely, JMC
Fujian Fuyao Glass	Xiamen King Long, South East Mitsubishi, Foton JAC Chery
Guangzhou Fuyao Glass	GAC Toyota, Guangzhou Honda, Nissan Huadu, BYD
Hubei Jingmen Fuyao Glass	Dongfeng Nissan, Dongfeng Citroen, Dongfeng Honda, BYD, Yutong
Saint-Gobain Hanglas Sekurit Glass	Beijing Hyundai, Shanghai Volkswagen, Yancheng KIA
Changchun Saint-Gobain Safety Glass	FAW-Volkswagen, BMW Brilliance
Shanghai Saint-Gobain Safety Glass	Beijing Hyundai, Shanghai Volkswagen, Yancheng KIA
Shanxi Lihu Glass (Group)	Geely, BYD, JAC, Changan Automobile
Hafei Automotive Glass	Hafei
Changzhou Industrial Technical Glass	Passenger car
Hai'an Yaohua Safety Glass	Passenger car

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How to Buy

Product details			How to Order
	USD	File	By email: report@researchinchina.com
Single user	1,900	PDF	By fax: 86-10-82601570
Enterprisewide	2,800	PDF	By online: www.researchinchina.com
Publication date: Mar.2010			
For more information, call our office in Beijing, China:			
Tel: 86-10-82600828			
Website: www.researchinchina.com			