



**Global and China Low-E Glass Industry
Report, 2010-2011**

Oct. 2011

This report

- ◆ **Analyzes global and China's low-e glass industry**
- ◆ **Focuses on China's low-e glass production and demand**
- ◆ **Highlights the operation of key low-e glass enterprises in China and worldwide**

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Abstract

Low emissivity glass (Low-E glass) is a kind of coated glass with lower radiation and higher energy conservation performance. From 1990 to 2010, the global sales volume of Low-E glass grew rapidly, breaking 680 million square meters in 2010, with an average annual compound growth rate of 19.2%. In recent years, countries around the world have issued policies to encourage energy-saving building materials, effectively promoting the development of Low-E glass industry.

Currently, Low-E glass is popular in developed countries. The Low-E glass penetration rate reached 93% in Germany, 92% in South Korea, and 79% in Poland, while only 10.2% in China, therefore, Low-E glass has great development potentials in China.

In recent years, China's Low-E glass output has increased year by year. Currently, there are about 20 Low-E production lines under construction, most with a designed capacity of about 3 million square meters and to be put into production in 2012-2013.

Low-E glass production lines are mainly concentrated in enterprises including CSG, Xinyi Glass, Yaohua Glass, and Yaohua Pilkington. Most of them adopt off-line technology and have expansion plans. For example, the industry leader CSG is engaged in the production of off-line Low-E glass, with production bases in Dongguan, Tianjin, Chengdu and Wujiang; its Low-E glass project under construction in Hubei Province with an annual output of 4.20 million square meters will be put into production in H2 2013.

This report focuses on the production costs, production lines, competition pattern, and demand in China's Low-E glass industry, and analyzes the operating environment (including policy, social and technical environment) for this industry.

With respect to technology, China mainly introduces Low-E glass production technology from foreign countries. CSG has introduced a number of vacuum magnetron sputtering coating lines from Leybold of Germany and Airco of the United States; it is the first one to launch single silver Low-E glass, double silver Low-E glass, bended steel Low-E glass and other energy-saving building glass products in China.

As for companies, this report studies four multinational companies (PG Industries, NSG, AGC, and Saint-Gobain) and 12 Chinese companies (including CSG, Taiwan Glass, Xinyi Glass, and Yaohua Pilkington).

Low-E Glass Production Lines of CSG

Production Base	Production Line	Capacity (1,000 m2)	Time to Production
Dongguan	I	3000	Feb. 2007
	I	1200	Jul. 2011
	I	3000	Mar. 2012
Tianjin	I	1200	Nov. 2004
	II	1200	Nov. 2004
	III	1200	Feb. 2007
	IV	1200	Feb. 2007
Chengdu	I	1000	Dec. 2006
	II	1200	H2 2010
	III	3000	Aug. 2011
	IV	3000	H1 2013
Wujiang, Jiangsu	I	1200	Dec. 2008
	II	1200	Mar. 2009
	III	1200	Jun. 2011
	IV	3000	Dec. 2011
	V	1200	2013
Hubei	I	1200	H2 2013
	II	3000	H2 2013

Source: ResearchInChina

1. Overview of Low-E Glass Products

- 1.1 Definition and Classification
- 1.2 Energy-efficient Effect

2. Development of Global Low-E Glass Industry

- 2.1 Development Course
- 2.2 Energy-efficient Policies for Buildings in Major Countries
 - 2.2.1 Germany
 - 2.2.2 The United States
 - 2.2.3 Japan
- 2.3 Application

3. Operational Environment of China's Low-E Glass Industry

- 3.1 Policy Environment
- 3.2 Social Environment
 - 3.2.1 Environmental Protection Issue
 - 3.2.2 Residents' Consumption Level
- 3.3 Technology Environment

4. China's Low-E Glass Production

- 4.1 Production Cost
- 4.2 Capacity
- 4.3 Enterprise Competition Layout

5. China's Low-E Glass Demand

- 5.1 Importance of Popularizing Low-E Glass
- 5.2 Application
- 5.3 Demand

6. Major Companies Worldwide

- 6.1 PPG Industries
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Development in China
- 6.2 NSG
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Architectural Glass Business
 - 6.2.4 Development in China
- 6.3 AGC
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Operation of Glass Business
 - 6.3.4 Development in China
- 6.4 Saint-Gobain
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Development in China
 - 6.4.4 Saint-Gobain Glass Co., Ltd

7. Major Chinese Companies

- 7.1 CSG
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Architectural Glass Products
 - 7.1.4 Project Plan
- 7.2 TGI
 - 7.2.1 Profile
 - 7.2.2 Main Products

- 7.2.3 TG Changjiang Float Glass Co., Ltd (CFG)
- 7.3 Xinyi Glass
 - 7.3.1 Profile
 - 7.3.2 Operation
- 7.4 Yaohua Pilkington
 - 7.4.1 Profile
 - 7.4.2 Operation
 - 7.4.3 Project Plan
- 7.5 Blue Star Glass
 - 7.5.1 Profile
 - 7.5.2 Low-E Glass Projects
 - 7.5.3 Development
- 7.6 Yaohua Glass
 - 7.6.1 Profile
 - 7.6.2 Operation
- 7.7 China Aviation Sanxin (CAS)
 - 7.7.1 Profile
 - 7.7.2 Operation
 - 7.7.3 Project Plan
- 7.8 Intex Glass (Xiamen)
 - 7.8.1 Profile
 - 7.8.2 Low-E Glass Products and Operation
- 7.9 Zhuzhou Kibing
 - 7.9.1 Profile
 - 7.9.2 Operation
 - 7.9.3 Subsidiary
- 7.10 Shandong Jin Jing Technology
 - 7.10.1 Profile
 - 7.10.2 Operation
 - 7.10.3 Project Plan
- 7.11 Grand Glass
- 7.12 Suzhou Huadong Coating Glass Co., Ltd

- Classification of Energy-saving Glass
- Classification of Low-E Glass
- Comparison between Offline and Online Process Low-E Glass
- Main Varieties and Applicability of Low-E Glass
- Comparison among Glasses by Heat Transfer Coefficient
- Comparison among Glasses by Energy-saving Performance
- Global Low-E Glass Development
- Building Energy-saving Policies in Germany
- Window Heat Transfer Coefficient Limits in Germany
- Low-E Glass Consumption and Utilization Rate in Germany, 1990-1999
- Building Energy-saving Policies in the United States
- Building Energy-saving Policies in Japan
- Low-E Glass Sales Volume & CAGR Worldwide, 1990-2010
- Low-E Glass Sales Volume & CAGR in Europe, 1985-1996
- Low-E Glass Penetration Rate in Major Countries, 2010
- Low-E Glass Technologies and Major Manufacturers in Foreign Countries
- Energy-Efficient Policies, Laws and Regulations for Buildings in China, 1986-2011
- Glass Industry-Related Trade Policies in China, 2007-2011
- Comparison among Glasses by CO₂ and SO₂ Emissions
- Yearly per Capita Housing Expenditure of Urban Household in China, 1995-2010
- Low-E Glass Manufacturing Cost Structure
- Major Low-E Glass Manufacturers and Capacities in China, 2011
- Low-E Glass Production Lines Using Domestic Equipment in China, 2011
- Output of Low-E Glass in China, 2005-2011
- Actual Capacity Distribution of Main Low-E Manufacturers in China, 2009
- China's Energy Consumption by Category

- Energy Consumption of Buildings in Northern China by Category
- Price Ratio of Low-E Glass to Clear Glass in China
- China's Low-E Glass Demand, 2006-2012E
- PPG Glass Business Structure
- Revenue and Net Income of PPG, 2007-H1 2011
- PPG Revenue Structure by Product, 2007-H1 2011
- PPG Revenue Structure by Region, 2008 vs. 2010
- PPG's Low-E Glass Business in China
- Operating Income and Net Sales of NSG, FY2007-FY2011
- Operating Revenue Structure of NSG by Region/Business, FY2011
- Sales & Operating Income Structure of NSG by Product, FY2011
- NSG Sales of Architectural Glass Products by Region, FY2011
- NSG Business Layout in China
- Operating Revenue and Total Profit of Tianjin NSG Safety Glass, 2007-2008
- Sales & Operating Income of AGC, 2008-2010
- Sales of AGC by Region, 2010
- AGC Flat Glass Classification and Main Products
- Net Sales of AGC by Product, 2010
- Major Special Glass Companies of AGC China
- Operating Revenue and Total Profit of AGC Flat Glass (Dalian), 2007-2009
- Revenue & Net Income of Saint-Gobain, 2007-H1 2011
- Saint-Gobain Revenue Structure by Product, 2009-H1 2011
- Saint-Gobain Revenue Structure by Region, 2009-H1 201H1
- Revenue of Saint-Gobain China, 2002-2010
- Saint-Gobain Business Distribution in China

- CSG Industry Chain Structure
- Operating Revenue & Net Income of CSG, 2007-H1 2011
- CSG Operating Revenue Structure by Sector, 2008-H1 2011
- Operating Revenue Structure of CSG by Region, 2008-H1 2011
- Main Financial Data of CSG Architectural Glass Subsidiaries, 2010
- Architectural Glass Project Investment Plan of CSG
- Profile of CFG
- Production Lines of CFG
- Operating Revenue & Net Income of Xinyi Glass, 2007-H1 2011
- Operating Revenue Structure of Xinyi Glass by Product, 2008-H1 2011
- Operating Revenue Structure of Xinyi Glass by Region, 2008-H1 2011
- Major Products and Subsidiaries of Yaohua Pilkington
- Operating Revenue & Net Income of Yaohua Pilkington, 2007-H1 2011
- Operating Revenue Structure of Yaohua Pilkington by Product, 2008-H1 2011
- Operating Revenue Structure of Yaohua Pilkington by Region, 2008-H1 2011
- Project Progress of Yaohua Pilkington
- Organization Structure of Weihai Bluestar Glass
- Low-E Glass Projects of Weihai Bluestar Glass
- New Projects of Weihai Bluestar Glass, H1 2011
- Main Products and Subsidiaries of Yaohua Glass
- Operating Revenue and Total Profit of Yaohua Glass, 2004-2009
- Low-E Glass Product Classification and Specification of CAS
- Operating Revenue & Net Income of CAS, 2007-H1 2011
- Operating Revenue Structure of CAS by Business, 2008-H1 2011
- Operating Revenue Structure of CAS by Region, 2008-H1 2011

- New Production Lines of CAS
- Operating Revenue and Total Profit of Intex Glass (Xiamen), 2004-2009
- Operating Revenue & Net Income of Zhuzhou Kibing, 2008-H1 2011
- Operating Revenue Structure of Zhuzhou Kibing by Product, 2008-H1 2011
- Operating Revenue Structure of Zhuzhou Kibing by Region, 2008-H1 2011
- Operating Revenue & Net Income of Jin Jing Technology, 2008-H1 2011
- Operating Revenue Structure of Jin Jing Technology by Product, 2009-H1 2011
- Operating Revenue Structure of Jin Jing Technology by Region, 2008-H1 2011
- Operating Revenue and Total Profit of Grand Glass, 2007-2009
- Operation Revenue and Total Profit of Suzhou Huadong Coating Glass, 2007-2009

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