



**Global and China Glass Fiber Industry
Report, 2012-2015**

Dec. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Fiber Glass Industry Association, and National Bureau of Statistics of China etc.

Abstract

In 2011, the global glass fiber supply hit 4.88 million tons, and the demand reached 4.66 million tons. Driven by the demand in emerging markets, the global supply is expected to grow by more than 8% to 5.30 million tons, and demand will amount to 4.94 million tons at a growth rate of 6% in 2012.

With the transfer of the industry, China has become the world's largest producer of glass fiber. In 2011, China produced 3.72 million tons of glass fiber, accounting for 76% of the global total. China's glass fiber output will grow to 4.30 million tons in 2012, sharing 81% of the global output. As 16 Chinese fiberglass kilns enter the cold repair period as well as the backward capacity is eliminated, China's glass fiber capacity will reduce by 250,000 tons or so in 2013. With the new realization of new capacity and the rebounding of downstream demand, the production will resume its growth during 2014-2015.

Like the global glass fiber industry, Chinese glass fiber market is also featured with high concentration, most of the capacity is concentrated in China Fiberglass Co., Ltd., Chongqing Polycomp International Corporation and Taishan Fiberglass Inc.. In 2012, these three companies altogether contribute 43% to the total glass fiber capacity

in China. As the new capacity puts into production, it is expected that the capacity of the three companies will account for 49% of China's glass fiber capacity in 2015.

Revenue of Major Glass Fiber Companies in China, 2011

Company Name	Revenue (RMB mln)	Main Products
China Fiberglass Co., Ltd.	5,038	Twistless roving, chopped strand, electronic-grade glass fiber yarn
Chongqing Polycomp International Corporation	3,358	Twistless roving, chopped yarn, chopped strand mat
Taishan Fiberglass Inc.	2,600	Twistless roving, electronic-grade textile yarn
Jiangsu Jiuding New Material Co., Ltd.	649	Textile spun yarn, glass fiber products
Jiangsu Changhai Composite Materials Co., Ltd.	444	Glass fiber yarn, chopped strand mat, wet mat, Composite separator
Xingtai Jinniu Fiber Glass Co.,Ltd.	427	Alkali-free glass fiber yarn
Zhuhai Fuhua Composite Materials Co., Ltd.	151	Textile spun yarn, processed glass cloth used for printed circuit boards
Sinoma Jinjing Fiberglass Co., Ltd.	134	Alkali-free glass fiber yarn, composite separator

Source: ResearchInChina *Global and China Glass Fiber Industry Report, 2012-2015*

China Fiberglass Co., Ltd. is the largest glass fiber manufacturer in China, with main products including twistless roving, chopped strand and electronic-grade glass fiber yarn. To avoid the anti-dumping policies of other countries against China, China Fiberglass has expanded its operations in overseas markets and successively established companies in Singapore, France, Japan, South Africa and other nations since 2010. In January 2012, China Fiberglass made investment for construction of an alkali-free glass fiber wiredrawing production line in Egypt; in October 2012, it built a 100,000 t/a alkali-free glass fiber wiredrawing production line in the United States. The foreign market layout helps China Fiberglass evade trade protectionism and raise overseas market share.

Taishan Fiberglass Inc, as the third largest glass fiber enterprise in China, has the similar product line to China Fiberglass, and it focuses on twistless roving and electronic-grade textile yarn. However, unlike China Fiberglass, Taishan Fiberglass enhances its exploration of domestic Chinese market, especially emerging application fields. In April 2012, Taishan Fiberglass obtained the S-1 HM high-performance glass twistless roving capacity of US-based AGY. Such twistless roving is mainly used for wind power generation. In the arena of wind power, Taishan Fiberglass has such regular customers as Sinomatech Wind

Power Blade Co. Ltd., Lianyungang Zhongfu Lianzhong Composites Group, etc..

The report covers the followings:

- Global glass fiber supply and demand, competition pattern, and forecast for 2013-2015;
- China's glass fiber supply and demand, competition pattern, import and export, as well as forecast for 2013-2015;
- Development of glass fiber products in China, as well as competitive landscape of major market segments;
- Development of Chinese glass fiber downstream market, demand for glass fiber in 2011-2015;
- Development, capacity construction and development strategy of major glass fiber manufacturers in China and beyond.

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 - 1.1.1 Definition
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