

**Global and China Low-E Glass Industry
Report, 2013-2016**

Aug. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

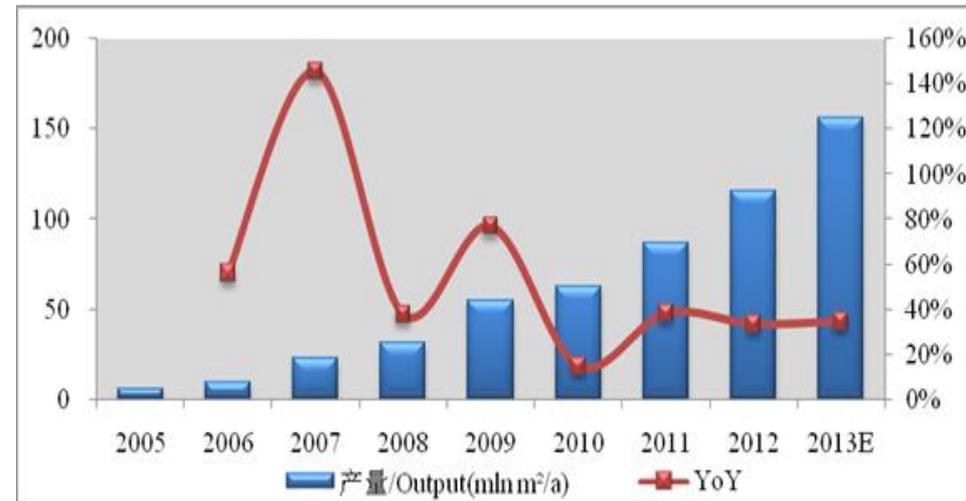
With the growing focus on energy conservation, emission reduction and environmental protection, countries in the world have successively introduced policies to encourage energy-efficient building materials, thus powerfully boosting the development of global low-E glass market whose sales volume showed a CAGR of about 19.5% in 2000-2012, and it is expected to reach 1.1 billion square meters in 2013.

Compared to developed countries, low-E glass popularity in China is still at a low level, merely 10.3%. In 2012, with completion and commissioning of a large number of production lines, China's low-E glass output rose 33.3% YoY to 116 million square meters.

Motivated by the Chinese energy conservation, energy-efficient buildings and other favorable policies, a large number of domestic glass companies have set foot in the low-E glass industry, resulting in a significant increase in production lines, outnumbering 100 in 2012, including over 20 new online low-E glass production lines. In 2013-2014, a great number of production lines built in early days will be completed and put into operation in succession, most of which can reach annual capacity of 4-10 million square meters.

Global and China Low-E Glass Industry Report, 2013-2016 mainly analyzes policy environment, technological environment, production costs, production lines and capacity, competitive landscape as well as demand conditions of global and China low-E glass industry, but also lays emphasis on operating conditions, low-E business development, etc. of 17 domestic and foreign companies.

Low-E Glass Output in China, 2005-2013



Source: ResearchInChina Global and China Low-E Glass Industry Report, 2013-2016

CSG Holding Co., Ltd. mainly produces off-line low-E glass products. Since 2011, it has adjusted low-E glass product structure, positioned in the medium- and high-end market, by degrees eliminated the first generation of low-E glass, replaced with the second and third generation to achieve differentiation development. As of the end-2012, CSG had had 12-million square meters/year low-E coated hollow glass and 6-million square meters/year low-E coated plate glass. In 2013-2014, it will further improve low-E glass industry layout, add three low-E glass production lines in Xianning and Wujiang, with new capacity up to 5.4 million square meters per year.

Taiwan Glass Group has accelerated expansion of low-E glass production line in recent years, while increasing online low-E glass production line. In 2012, low-E production lines newly built by TG Huanan Glass, TG Taicang Architectural Glass and TG Wuhan Architectural Glass were successively put into production. After the expansion, the Group will possess 11 low-E glass production lines, with capacity reaching 46 million square meters/a. In June-July 2013, its 1,200t/d online low-E float glass production lines in Anhui Province and Xianyang (Shaanxi Province) were ignited and put into production one after another, provided with the largest single unit capacity on a global scale. In July of the same year, TG Xianyang Glass embarked on the construction of low-E glass production line, with new capacity expected to be eight million square meters/a.

Zhuzhou Kibing Group Co., Ltd gives priority to the development of online low-E glass. By the end of 2012, it had had two online energy-efficient low-E coated glass production lines, with daily melting capacity of 600 tons. In May, 2012, the Group according to the plan implemented the overall relocation and transformation, i.e. new construction of one Zhangzhou 600t/d online low-E coated glass production line and a 700t/d online low-E coated glass production line, respectively planned to be put into production in the second half of 2013 and before December 2014.

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