



China Quartz Glass Material and Product Industry Report, 2015

Jan. 2015

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.

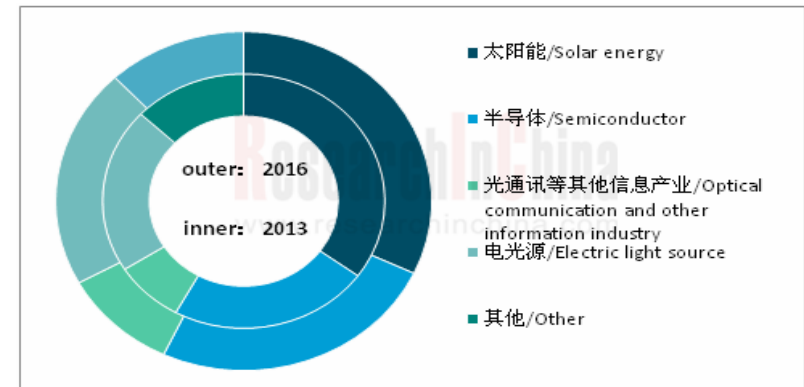
Abstract

The materials and products made of quartz glass are mainly used in a broad array of fields, including electric light source, semiconductor, optical communication, aerospace, and solar energy. Among them, solar energy constitutes the major consumption area for Chinese quartz glass materials and products, accounting for roughly 35% of the total revenue. That was followed by semiconductor and electric light source, which occupy 23% and 21%, respectively.

In 2001-2012, driven by the growth in China's electronic information industry, electric light source industry, and photovoltaic industry, the revenue from quartz glass material and product industry in China recorded a CAGR of about 24%. In 2013, the revenue from this industry reached RMB5.789 billion, up 8.90%, year on year. In 2014, it continued to grow at an annual growth of approximately 10%, a rate that was slightly lower than that prior to 2011, and this was mainly resulted from a downturn in downstream sectors, especially in the photovoltaic industry.

Quartz glass material and product manufacturers in China mainly include Feilihua, Pacific Quartz, Beijing Kinglass Quartz, Jinzhou New Century Quartz, and Quick Gem Optoelectronic. In terms of product competition, the domestic enterprises focus primarily on the production of low and middle-end quartz glass materials and products, while high-end products are still imported from the countries such as the United States, Germany, and Japan.

Downstream Consumption Structure of Quartz Glass Materials and Products in China in 2013 and 2016



Source: ResearchInChina

As for enterprise competition, the domestic companies like Feilihua, Pacific Quartz, and Quick Gem Optoelectronic S&T concentrate mainly on market segments. Feilihua has a comprehensive product line, covering the materials and products used in optical communication, semiconductor, solar energy, aerospace, etc. In the first three quarters of 2014, Feilihua posted RMB202.8 million in revenue and RMB44.1 million in net income, down 2.54% and 1.59%, respectively, year on year. This mainly arose out of a slump in PV industry and product price reduction brought about by intensified competition in the downstream sectors. Main product of Pacific Quartz involves quartz tube used in electric light source, and the company will extend its existence to other fields in the future; Quick Gem Optoelectronic is absorbed in quartz liners and sleeves for optical fiber perform.

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