



# **China Automotive Glass Industry Report, 2016-2020**

**Dec. 2016**

## **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.

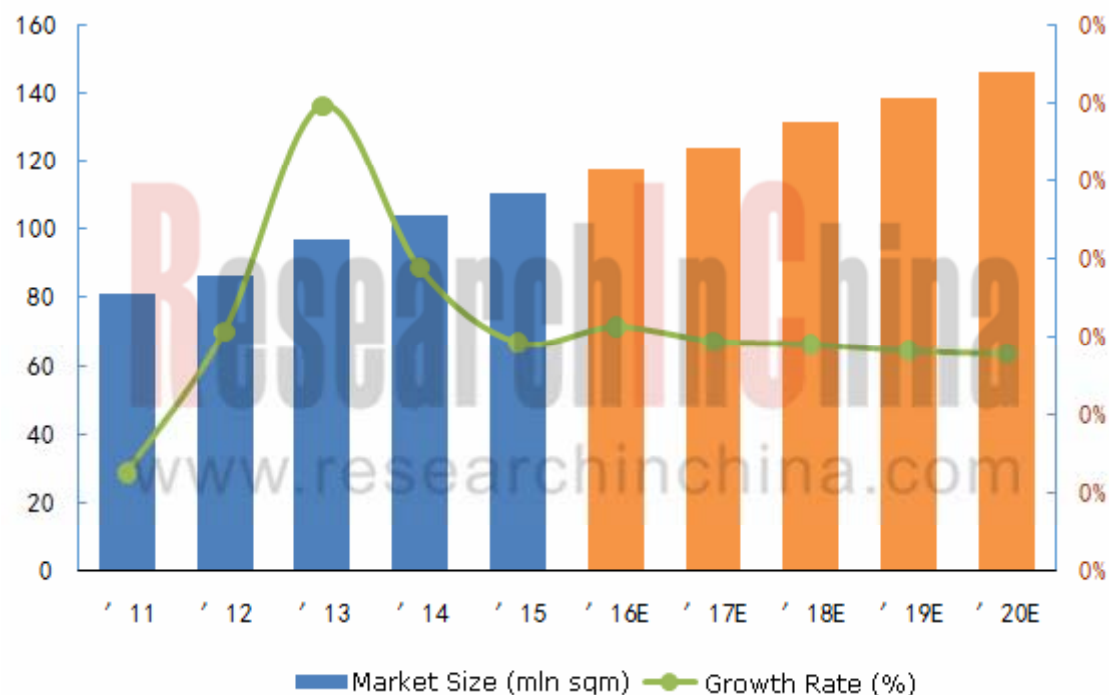
## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

The huge automobile market boosts the demand for automotive glass and other parts constantly. China's automotive glass market size reached 110 million square meters in 2015, with a CAGR of 7.9% compared with 2011. With the slowdown in the automobile market in the future, the automotive glass market will decelerate, at a CAGR of 5.9% in the next five years. By 2020, the market size is expected to reach 146 million square meters.

**Automotive Glass Market Demand in China, 2011-2020E**



Source: ResearchInChina

Chinese automotive glass market is mainly divided into the supporting market and the maintenance & replacement market. The supporting market shared about 88.3% of the whole automotive glass market in 2015, but the demand herein will decline in the future with the falling automobile output growth; the maintenance & replacement market occupied about 11.7%, while the demand herein will jump with China's rising car ownership and extended car service life.

In terms of products, the current mainstream automotive glass still centers on tempered glass and laminated glass. With higher requirements of drivers and passengers on safety and comfort as well as in-depth applications of optical, mechanical and other technologies in glass products, special function glass has been more and more popular in the market. For example, HUD glass has been assembled in BMW 7 Series, Lexus RX350, Audi, Citroen C6 and other high-end models; Fiat has applied liquid crystal dimmable glass made of PDLC flexible film to windshields and rear window glass; antennas, various electronic components, edge strips, heating wires and other accessories are increasingly integrated into glass to receive signals, provide reverse imaging, waterproof, dustproof and heating functions. In addition, thermal insulation and soundproof glass is used more widely as well.

As for competitive landscape, Chinese auto parts supporting market has entered into a relatively stable stage with high concentration after years of development. Fuyao Glass seized 63% market share exclusively in 2015 and has established relationship with most of major Chinese automakers to support a wide range of passenger cars and commercial vehicles. Asahi Glass (AGC) enjoyed 12% market share in 2015, serving passenger cars under Japanese brands. Saint-Gobain that mainly targets European passenger cars ranked third by market share. The followers -- Xinyi Glass, NSG, Shanghai Yaohua Pilkington Glass and other companies held the respective market share of less than 10%, mainly involved with passenger cars; other manufacturers mainly focus on low-grade commercial vehicle supporting and replacement markets.

The report mainly covers the following:

- Overview of China automotive glass industry (including definition, classification, development course, industry chain analysis, industry policies and development trends, etc.);
- Analysis on global and China automobile industry (containing output, sales volume, market size, competitive landscape, etc.);
- Analysis on global and China float glass industry (embracing market size, competitive landscape, development trends, etc.);
- Analysis on global and Chinese automotive glass market (comprising market size, market segments, competitive landscape, etc.);
- Analysis on 15 domestic and overseas automotive glass manufacturers such as Asahi Glass, NSG, Fuyao Glass, Shanghai Yaohua Pilkington Glass, Xinyi Glass, Saint-Gobain, Shanxi Lihu Glass, Guangzhou Dongxu Automobile Glass and Changzhou Changjiang Glass (profile, financial status, products, production, marketing, capacity distribution, production bases, R & D, as well as the latest developments).

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### 1 Overview of Automotive Glass

- 1.1 Properties
- 1.2 Production
- 1.3 Industrial Chain
- 1.4 Policies

### 2 Overview of Flat (Float) Glass Industry

- 2.1 Global Float Glass Industry
- 2.2 China's Flat (Float) Glass Industry
  - 2.2.1 Capacity and Output
  - 2.2.2 Demand
  - 2.2.3 Price
  - 2.2.4 Competitive Landscape

### 3 Global and Chinese Automobile Markets

- 3.1 Global Automobile Output
  - 3.1.1 Total Output
  - 3.1.2 Regional Markets
  - 3.1.3 Competition Pattern
- 3.2 Chinese Automobile Market
  - 3.2.1 Output
  - 3.2.2 Ownership of Automobiles
  - 3.2.3 Market Pattern
- 3.3 Developments of Chinese Automobile Market in 2016

### 4 Automotive Glass Industry

- 4.1 Global Market

- 4.1.1 Market Size
- 4.1.2 Market Segments
- 4.1.3 Competitive Landscape
- 4.1.4 Development Trend
- 4.2 Chinese Market
  - 4.2.1 Market Size
  - 4.2.2 Market Segments
  - 4.2.3 Supply Relation
  - 4.2.4 Competitive Landscape

### 5 Automotive Glass Manufacturers

- 5.1 AGC
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 Glass Business
  - 5.1.5 Strategy
  - 5.1.6 Development in China
  - 5.1.7 Production Bases
- 5.2 NSG
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 Automotive Glass Business
  - 5.2.5 Global Footprint
  - 5.2.6 Strategy
  - 5.2.7 Strongholds in China
- 5.3 Shanghai Yaohua Pilkington Glass Group Co., Ltd.

- 5.3.1 Profile
- 5.3.2 Operation
- 5.3.3 Revenue Structure
- 5.3.4 Gross Margin
- 5.3.5 Major Products
- 5.3.6 SYP Kangqiao Autoglass Co., Ltd.
- 5.3.7 Dynamics
- 5.4 Xinyi Glass Holdings Limited
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Revenue Structure
  - 5.4.4 Gross Margin
  - 5.4.5 Major Products
  - 5.4.6 Production Bases
  - 5.4.7 Dynamics
- 5.5 Fuyao Glass Industry Group Co., Ltd.
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Revenue Structure
  - 5.5.4 Gross Margin
  - 5.5.5 Major Products
  - 5.5.6 R&D
  - 5.5.7 Production Bases
  - 5.5.8 Capacity Analysis
  - 5.5.9 Dynamics
- 5.6 Saint-Gobain
  - 5.6.1 Profile
  - 5.6.2 Operation

5.6.3 Revenue Structure	5.14 Shandong Jinjing Science & Technology Stock Co., Ltd.
5.6.4 Automotive Glass Business	5.14.1 Profile
5.6.5 Business in China	5.14.2 Automotive Glass Business
5.7 Shanxi Lihu Glass (Group) Co., Ltd.	5.15 Taiwan Glass Ind. Corp.
5.7.1 Profile	5.15.1 Profile
5.7.2 Major Products	5.15.2 Major Products & Customers
5.8 Guangzhou Dongxu Automobile Glass Co., Ltd.	5.15.3 Production & Sales
5.8.1 Profile	5.15.4 Business in Chinese Mainland
5.8.2 Major Products	
5.8.3 Nanjing Yunhai Automobile Glass & Equipment Manufacturing Co., Ltd.	
5.9 Changzhou Changjiang Glass Co., Ltd.	
5.9.1 Profile	
5.9.2 Major Products	
5.10 Hebei Tongyong Glass Industrial Co., Ltd.	
5.10.1 Profile	
5.10.2 Major Products	
5.10.3 Marketing Network	
5.11 Jiangsu Tiemao Glass Co., Ltd.	
5.11.1 Profile	
5.11.2 Major Products	
5.11.3 Dynamics	
5.12 Ming Chi Glass Co., Ltd.	
5.12.1 Profile	
5.12.2 Major Products	
5.13 BSG Auto Glass Co., Ltd.	
5.13.1 Profile	
5.13.2 Major Products	

## Selected Charts

- 
- Key Production Processes for Laminated Glass
  - Key Production Processes for Tempered Glass
  - Global Output of Float Glass, 2011-2020E
  - Production Capacity of Float Glass in China, 2011-2020E
  - Float Glass Output and Capacity Utilization in China, 2011-2020E
  - Float Glass Demand in China, 2011-2020E
  - Main Applied Markets of Float Glass, 2015
  - Global Automobile Output, 2011-2020E
  - Automobile Output (by Model) in Major Countries, 2015
  - Automobile Output (by Model) in Major Countries, 2016H1
  - Market Shares of Major Automobile Manufacturers, 2015
  - Automobile Output in China, 2010-2020E
  - Ownership of Automobiles in China, 2007-2020E
  - Ranking of Top 10 Automobile Manufacturers in China, Jan-Oct 2016
  - Ranking of Top 10 Passenger Car Brands by Output in China, Jan-Oct 2016
  - Ranking of Top 10 Commercial Vehicle Manufacturers by Output in China, Jan-Oct 2016
  - Table of Automobile Production and Sales in China, Oct 2016
  - Automobile Output Structure (%) by Type in China, Jan-Oct 2016
  - Automobile Sales Volume Structure (%) by Type in China, Jan-Oct 2016
  - Table of Passenger Car Production and Sales in China, Jan-Oct 2016
  - Diagram of Sedan Production and Sales in China, Jan-Oct 2016
  - Diagram of MPV Production and Sales in China, Jan-Oct 2016
  - Diagram of Cross Passenger Car Production and Sales in China, Jan-Oct 2016
  - Diagram of SUV Production and Sales in China, Jan-Oct 2016
  - Table of Commercial Vehicle Production and Sales in China, Jan-Oct 2016

## Selected Charts

- Diagram of Truck Production and Sales in China, Jan-Oct 2016
- Diagram of Bus Production and Sales in China, Jan-Oct 2016
- Global Automotive Glass Market Size, 2011-2020E
- Market Share of World's Major Automotive Glass Manufacturers, 2015
- Sketch Map of Insulating Glass
- HUD Display Glass
- Sketch Map of Hydrophobic Glass
- Sketch Map of Muffled Automotive Glass
- Sketch Map of Antenna Automotive Glass
- Sketch Map of Windshield Heating Glass with Metal Threads
- Structure of Automotive Glass with Electrothermal Film
- Geographical Distribution of Key Automakers and Automotive Glass Makers in China
- Market Share of Major Automotive Glass Manufacturers in China, 2015
- Comparison of Leading Automotive Glass Manufacturers in China
- AGC's Operations in Three Major Regions
- Quarterly Operational Indicators of AGC's Main Business, 2015-2016
- Quarterly Operational Indicators of AGC in Major Regions, 2015-2016
- Core Strategy "Vision 2025" of AGC
- AGC's Intensified Strategy for Its Core Business
- Future Strategic Business of AGC
- Progress of AGC's Mid-term Management Planning
- Main Strongholds of AGC in China
- Profile of AGC Autoglass (China) Co., Ltd.
- Profile of AGC Autoglass (Foshan) Co., Ltd.
- Profile of AGC Flat Glass (Dalian) Co., Ltd.




## Selected Charts

- Profile of AGC Autoglass (Suzhou) Co., Ltd.
- General Overview of NSG's Automotive Glass Business
- Selected Financial Indicators of NSG's Automotive Glass Business, FY2015-FY2016
- NSG's Revenue from Automotive Glass Business by Region, FY2016
- Distribution of NSG's Float Glass Production Lines in the World
- Distribution of NSG's Automotive Glass Production Lines in the World
- NSG's Strategies for Its Three Stages of Development
- Key Means of Implementing Strategies for Various Operations of NSG
- Glass Production Lines of NSG in China
- Profile of Guilin Pilkington Safety Glass Co., Ltd.
- Revenue (by Product) of Shanghai Yaohua Pilkington Glass Group, 2015-2016
- Revenue (by Region) of Shanghai Yaohua Pilkington Glass Group, 2015-2016
- Gross Margin (by Product) of Shanghai Yaohua Pilkington Glass Group, 2014-2016
- Main Automotive Glass Products of Shanghai Yaohua Pilkington Glass Group
- Output, Sales Volume and Inventory of Main Products of Shanghai Yaohua Pilkington Glass Group, 2015
- Automotive Glass Capacity of Shanghai Yaohua Pilkington Glass Group, 2014-2018
- Profile of SYP Kangqiao Autoglass
- Revenue and Net Income of SYP Kangqiao Autoglass, 2014-2016
- Profile of Dongguan Benson Automobile Glass Co., Ltd.
- Profile of Xinyi Automobile Glass (Shenzhen) Co., Ltd.
- Profile of Xinyi Automobile Parts (Wuhu) Co., Ltd.
- Profile of Xinyi Energy-saving Glass (Sichuan) Co., Ltd.
- Profile of Xinyi Automobile Parts (Tianjin) Co., Ltd.
- Revenue (by Region) of Fuyao Glass Industry Group, 2013-2016
- Revenue (by Business) of Saint-Gobain, 2014-2016

- 
- Revenue (by Region) of Saint-Gobain, 2014-2016
  - Profile of SEKURIT
  - Automotive Glass Production Layout of Saint-Gobain Worldwide
  - Global Automotive Glass R&D Center of Saint-Gobain
  - Major Brands Supported by Automotive Glass of Saint-Gobain
  - Saint-Gobain's Revenue in China, 2013-2015
  - Number of Employees of Saint-Gobain in China, 2013-2015
  - Profile of Saint-Gobain HanGlas Sekurit (Shanghai) Co., Ltd.
  - Profile of Saint-Gobain Safety Glass (Shanghai) Co., Ltd.
  - Profile of Shanxi Lihu Glass (Group)
  - Main Automotive Glass of Shanxi Lihu Glass (Group)
  - Profile of Guangzhou Dongxu Automobile Glass
  - Main Automotive Glass Products of Guangzhou Dongxu Automobile Glass
  - Some Brands of Automotive Glass Replacements Provided by Guangzhou Dongxu Automobile Glass
  - Profile of Nanjing Yunhai Automobile Glass & Equipment Manufacturing Co., Ltd.
  - Profile of Changzhou Changjiang Glass
  - Sketch Map of Bus Insulating Glass of Changzhou Changjiang Glass
  - Profile of Hebei Tongyong Glass Industrial
  - Main Automotive Glass Products of Hebei Tongyong Glass Industrial
  - Overseas Marketing Network of Hebei Tongyong Glass Industrial
  - Profile of Jiangsu Tiemao Glass
  - Main Automotive Glass Products of Jiangsu Tiemao Glass
  - Major Customers of Jiangsu Tiemao Glass
  - Profile of Ming Chi Glass
  - Main Automotive Glass Products of Ming Chi Glass

## Selected Charts

- 
- Profile of BSG Auto Glass Co., Ltd.
  - Main Automotive Glass Products of BSG Auto Glass Co., Ltd.
  - Profile of Shandong Jinjing Science & Technology Stock Co., Ltd.
  - Profile of Shandong PGW Jinjing Automotive Glass Co., Ltd.
  - Profile of Taiwan Glass Ind. Corp.
  - Major Customers of Taiwan Glass Ind. Corp.
  - Output of Taiwan Glass Ind. Corp in Main Producing Areas, 2014-2015
  - Sales Volume of Taiwan Glass Ind. Corp. in Main Producing Areas, 2014-2015
  - Taiwan Glass Ind. Corp's Production Layout of Main Products in Chinese Mainland
  - Profile of TG Yueda Autoglass Co., Ltd.

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