Global and China 3D Glass Industry Chain Report, 2019-2025

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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 evolution of AMOLED conduces to the steady development of 3D curved glass market. In 2018, the global 3D glass market expanded 37.7% on an annualized basis and reached $1.9 billion, a figure projected to soar to $2.7 billion in 2019 and more than $8.0 billion in 2025. It is notable that the Chinese 3D glass market size was approximately RMB2.4 billion (or $360 million by the exchange rate 1:6.6174) in 2018, surging by 59.1% from a year ago and a 19.2% share of the global total, with an expected AAGR of 20%-30% between 2019 and 2025.

In 2018, at least 30 million pieces of 3D glass were needed in China, growing at a pace of above 60%, over 94% of which was from smart phones and the remaining 6% from wearable devices, VR, dashboard, among others. Till 2025, the demand for 3D glass will outnumber 170 million pieces as it gets used widely, largely due to the following:

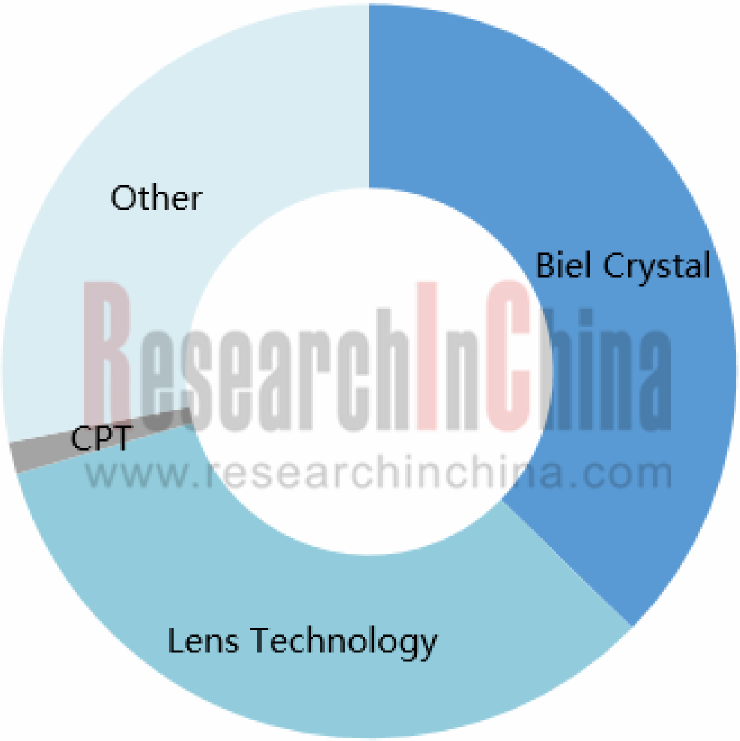
Firstly, AMOLED screen finds wider application in smart phones, spurring the need for 3D cover glass. In 2018, AMOLED screen enjoys a penetration rate of a critical 20% in smart phones and has been the standard configuration of the top five cellphone brands' flagship models. AMOLED screen is commonly seen in Huawei and Xiaomi handsets.

Secondly, the advances in 5G are pushing forward a change in handset housings to glass and ceramic materials. As 5G signals are vulnerable to interference and the wireless charging feature relies on the non-metal materials like 3D glass and ceramics to be exerted better, 3D glass/ceramic will be the mainstream selection for the cellphone back cover.

Lastly, the in-vehicle market will be the next blue ocean. While cars are becoming digitalized and intelligent, the onboard display is gearing to the large-size and human-based design, with which 3D glass can be connected seamlessly. The large-size 3D glass, therefore, embraces bright prospects in the automotive display modules.

As concerns the manufacturing technology, hot bending is one of the key procedures in production of 3D curved glass. Japanese and South Korean companies lead the pack in the 3D glass hot bending machine market, while the Chinese counterparts are sparing no efforts in research and development of technologies, and Aurora Optoelectronics, for instance, rolled out China's first large-sized automotive 3D glass hot bending machine in 2018. With the maturity of 3D hot bending machine in China, 3D glass production costs will be reduced.

Competitive Pattern of Chinese 3D Glass Market, 2018



Source: Global and China 3D Glass Chain Report, 2019-2025 by ResearchInChina

There are now over twenty producers of curved cover glass in China, and most of them produce 2.5D glass. Only a few players like Lens Technology, Biel Crystal, Zhejiang Firstar Panel Technology, BYD Electronics and Kornerstone Materials Technology Co., Ltd. (KMTC) can spawn 3D glass, among which Lens Technology and Biel Crystal stay ahead in Chinese 3D glass industry, each holding at least 30% market shares in 2018.

Many manufacturers are rushing to foray in the promising 3D glass sector, causing a visible fall in the market concentration in the future with the release of new capacities.

The report highlights the followings:

- Global 3D glass market (supply, demand, market structure, etc.);
- Chinese 3D glass market (size, structure, patents, market price, competitive landscape, market drivers, etc.);
- 3D glass production materials like glass substrate, polishing material, bonding material, ink, etc. (market size, competitive pattern, etc.);
- 3D glass processing equipment such as hot bending machine, CNC engraving and milling machine and flat grinding machine (market size, current competition, processing technology, etc.);
- Downstream markets like smart phone, wearable devices and VR and the demand for 3D glass;
- World’s 18 manufacturers of 3D glass (operation, 3D glass business, etc.)

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