

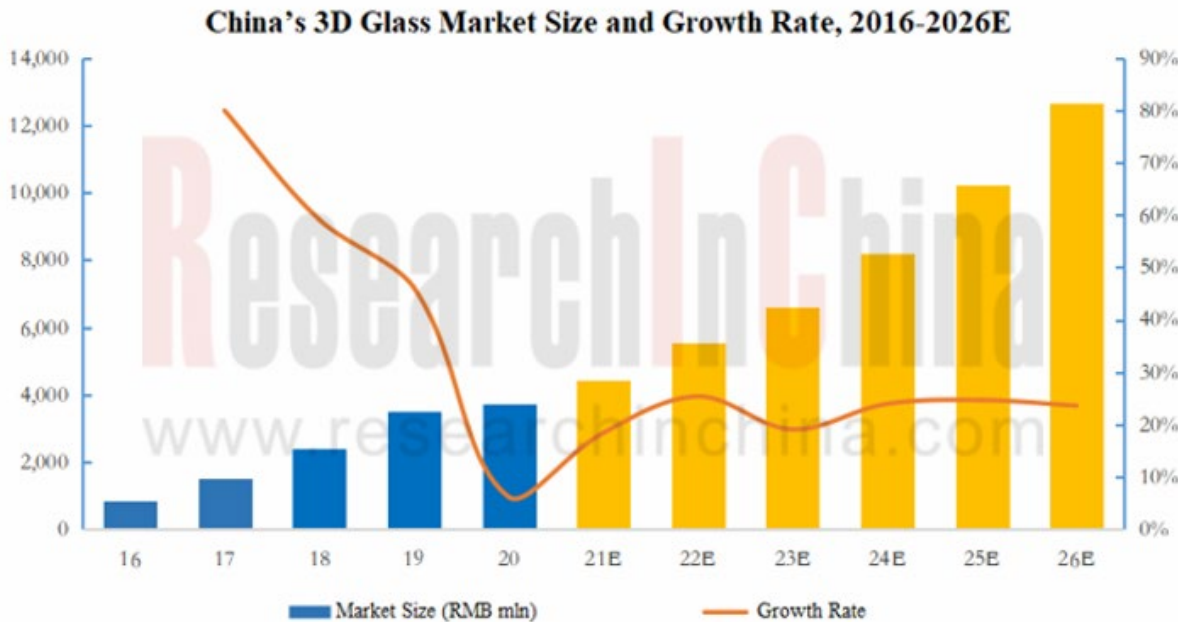


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Global and China 3D Glass Industry Report, 2021-2026

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3D curved glass is light and thin, transparent and clean, anti-fingerprint, anti-glare, hard and scratch-resistant, and performs well in weather resistance. It is applicable to terminals such as high-end smartphone and tablet PC, wearable device, dashboard and industrial computer. As the technology matures, 3D glass is available to a wider range of scenarios. The rising demand boosts China's 3D glass market which was worth roughly RMB3,743 million in 2020, up 6.2% year on year. The global COVID-19 pandemic has dragged down the growth, but the market is expected to be valued at up to RMB12,656 million in 2026 as more 3D glass is demanded by mobile phones and wearable devices.



Source: ResearchInChina

Global and China 3D Glass Industry Report, 2021-2026 highlights the following:

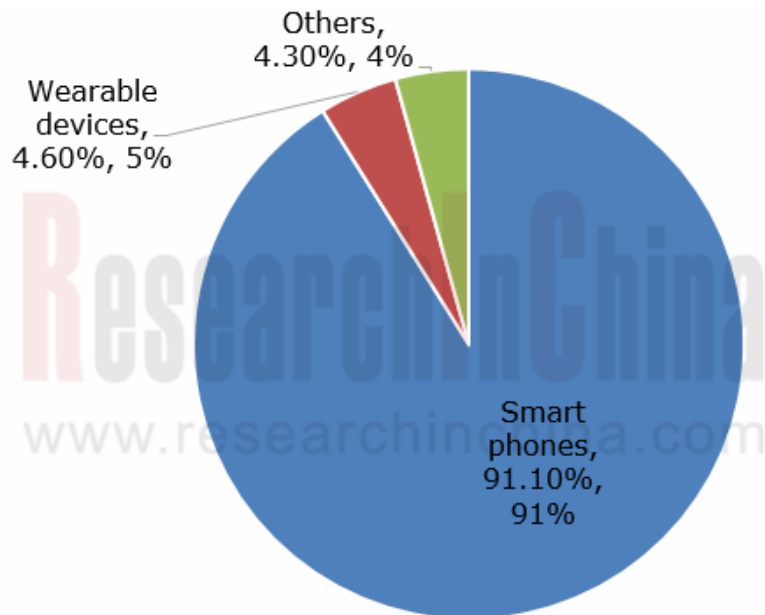
- ◆ 3D glass (definition and classification, technology status, development history, industry chain, etc.)
- ◆ Global 3D glass industry (supply, demand, market structure, etc.);
- ◆ Chinese 3D glass market (size, structure, patents, prices, competitive pattern, drivers, etc.);
- ◆ 3D glass production materials (glass substrate, polishing materials, laminating materials, ink, etc.) (market size, competitive pattern, etc.);
- ◆ 3D glass processing equipment (hot bending machine, engraving machine, flat grinding machine, etc.) (market size, competition, processing technology, etc.);
- ◆ Downstream application markets (smartphone, wearable device, VR, etc.) (status quo, demand for 3D glass, etc.);
- ◆ 15 3D glass manufacturers worldwide (operation, 3D glass business, etc.).

3D glass industry chain involves raw materials at the upstream end, processing and manufacturing at the midstream end, and consumer electronics demand at the downstream end. The upstream raw materials include glass substrate, laminating materials, ink and polishing powder; manufacturing equipment include automatic cutting machine, engraving machine, grinding machine, hot bending machine, pressing machine, screen printing machine, baking line, coating machine, and ultrasonic cleaning machine; at the downstream end of equipment manufacturers are glass panel and touch screen manufacturers.

China 3D Glass Industry Chain

Upstream raw materials and equipment	<p>Glass substrate: Corning, Tunghsu Optoelectronic Technology, Nippon Sheet Glass, etc.</p> <p>Laminating materials: Hitachi, Nitto, 3M, Kingbali, etc.</p> <p>Ink: TOYOINK, Fangda Carbon, Liaoyang Hongtu Carbide, etc.</p> <p>Polishing powder: China Northern Rare Earth (Group) High-Tech, Guangzhou ShinShi Metallurgical and Chemical, Lanzhou Debao Chemical</p> <p>Production equipment: Anhui Yinrui Intelligent Technology, Beijing Jingdiao Group, Shenzhen ACE Automation, Han'S Laser Technology Industry Group, Samsun Technology</p>
Midstream processing companies	
Downstream demand companies	

Using 3D glass as cover plate is a way to not only make terminal electronics look more stylish but provide better touch control experience for users. 3D curved glass becomes available to more downstream sectors including smartphone, tablet PC, wearable device, watch, and dashboard. 3D glass still gets most used in smartphones, with market share of around 91%; in the wearable device market surging in recent years, 3D glass boasts a high penetration and is expected to win a bigger place.



Through the lens of competitive pattern, the soaring demand for 3D glass in China in recent years has made cover glass manufacturers work to deploy 3D cover glass projects, and the 3D cover glass market attracts ever more entrants. Typical manufacturers are Lens Technology, Zhejiang Firstar Panel Technology, Triumph Science & Technology, Henan Ancai Hi-Tech and CPT Technology.

Among them, Lens Technology is a listed company specializing in developing, producing and selling high-end window touch cover glass panels, touch modules, and new window touch cover materials. Its products including window cover glass, touch screen monomer, touch screen module, camera, button, ceramics, and metal accessories find massive application in mobile phones, tablet PCs, notebook computers, digital cameras, players, GPS navigation devices, vehicle touch controls, smart wearable devices, and smart home. In 2020, its cover glass business contributed revenue of RMB30 billion.

Closely following the needs of industries for cutting-edge technologies, Zhejiang Firstar Panel Technology concentrates on developing and manufacturing a variety of window cover glass screens, touch screens, touch display modules, new display devices and related materials and components, which are mainly used in mobile internet terminals like smartphone and tablet PC. In 2020, the company recorded RMB1.5 billion in revenue from window cover glass products.

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