

Global and China Automotive Glass Industry Report, 2010-2011

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Abstracts

Glass industry has two special features. First, it is very sensitive to the transport cost; second, once the production line runs, it is difficult to pause.

Automotive glass industry also has the above features. Glass is fragile and its price is not high, but the transport cost accounts for a relatively high proportion of the unit price. In order to reduce the transport cost, manufacturers must be geographically close to the downstream customers. The core elements of glass production lines are furnaces. Once a furnace suspends, it will take a long time to return to work. Therefore, even there are no orders, furnaces must work constantly. In other words, glass production lines require stable and enough orders. The transport cost and furnaces determine the strong regional feature of automotive glass industry.

China automotive parts industry, particularly sedan parts industry, is basically controlled by foreign enterprises. However, in China automotive glass industry, local enterprises take a dominating position due to the strong regional feature of automotive glass industry.

In China, Fuyao Glass has more than 50% market shares. Fuyao Glass has production bases in Changchun, Beijing, Shanghai, Fuqing, Chongqing, Wuhan and Guangzhou. Its Zhengzhou base will be built up in 2012.

Limited by the policy on joint ventures, Chinese partners chosen by foreign-funded enterprises may not be located in the periphery of their customers. AGC's production bases are in Foshan and Qinhuangdao, while its customers are mainly located in Tianjin, Wuhan and Guangzhou. However, these production bases were built after 2000, and AGC entered China in 1992 when it could not take geographical factors into

account while choosing partners.

NSG is also in such an awkward position, its customers are mainly in Shanghai, Tianjin, Wuhan and Guangzhou, but it does not have production bases in Tianjin and Guangzhou. Saint-Gobain's Changchun base only manufactures plastic frames for automotive glass.

Guardian has not entered the Chinese market, so its revenue decline is not surprising. Before sold to Kohlberg, PGW was the automotive glass sector of PPG, and all of its production bases are in North America.

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Automotive Glass Cost Structure

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