

Glass Fibers: Fiberglass/Glass Wool and Glass Fiber Reinforcements - A Global Market Overview

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Abstracts

The year 2010 witnessed a turnaround, with economic recovery peeping through the clouds in almost all major global regions, and demand for glass fibers in virtually all end user applications awoke from its slumber. Europe, though, continued in a depression mode, with demand for glass fibers in several applications refusing to pep up.

Primary factors driving demand for fiberglass or glass wool insulation include levels of residential, commercial and industrial construction and refurbishment activity, increasingly stringent building codes and an enhanced requirement for energy efficiency, in addition to demand from the industrial sector, though by a lesser degree. On other hand, Glass fiber reinforcements demand for most end user applications between 2006 and 2011 has exhibited a declining trend in North America and Europe, only to be sustained by the emerging economies of Asia-Pacific and Eastern Europe. Wind energy, though constituting a low volume market, is expected to emerge as the fastest growing end use application for glass fibers with a CAGR of 14.4%, primarily fuelled by the Chinese wind energy market.

Market for Glass Fiber product segments analyzed in this study includes Fiberglass/Glass Wool and Glass Fiber Reinforcements. The report analyses the market in terms of volume consumptions in metric tons as well as value consumption in US\$ dollars. The report also includes the end-use application analysis for Fiberglass/Glass Wool – Residential Construction, Commercial & Industrial Construction, Industrial & HVAC Applications and Appliances & Other; and Glass Fiber Reinforcements – Automotive & Transportation, Marine, Wind Energy, Pipe, Tank & Other Corrosion Resistant Equipment, Building & Construction, Electrical & Electronics, Consumer Goods, Aerospace & Defense and Others.

This report also examines the market for Glass Fiber reinforcements by product forms such as Single-end Rovings, Multi-end Rovings, Woven Rovings, Chopped Strands, Chopped Strand Mat (CSM), Continuous Filament Mat (CFM), Fabrics and Others for global and regional markets. Global market for Glass Fibers is estimated to touch 9.9 million metric tons, valued at US\$22.2 billion, in 2012.

The report reviews, analyses and projects the Glass Fiber market for global and the regional markets including North America, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 15 independent countries across North America – the United States and Canada; Europe –Germany, France, Italy, the United Kingdom, Spain and Rest of Europe; Asia-Pacific – China, Japan, India, South Korea and Rest of Asia-Pacific; Rest of World – Russia, Turkey, Brazil and other.

This 667 page global market report includes 472 charts (includes a data table and graphical representation for each chart), supported with a meaningful and easy to understand graphical presentation, of the market. The statistical tables represent the data for the global market by geographic region, Product Segment and application area.

This report profiles 24 key global players and 97 major players across the North America – 20; Europe – 20; Asia-Pacific – 45; and Rest of World - 12. The profiles also include addresses, contact numbers and the website addresses.

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ALGHANIM INDUSTRIES
ASAHI FIBER GLASS CO., LTD
BGF INDUSTRIES (PORCHER GROUP)
BRAJ BINANI GROUP
CHINA FIBERGLASS CO. LTD. (JUSHI GROUP)
CHOMARAT
CHONGQING POLYCOMP INTERNATIONAL CORP (CPIC FIBERGLASS)
CSR BRADFORD INSULATION
GUARDIAN INDUSTRIES
HEBEI HUAMEI GROUP CO. LTD.
JOHNS MANVILLE CORPORATION
KCC CORPORATION
KNAUF INSULATION GmbH
NIPPON ELECTRIC GLASS CO LTD
NITTO BOSEKI CO LTD
OWENS-CORNING
PPG FIBER GLASS (PPG INDUSTRIES)
SAERTEX GmbH & CO. KG
SAINT-GOBAIN
SUPERGLASS INSULATION LTD.
TAISHAN FIBERGLASS INC (CTG)
TAIWAN GLASS INDUSTRY CORPORATION

URSA INSULATION, S.A (URALITA GROUP)

5. KEY BUSINESS TRENDS

Superior Performing ToughGard® Ultra*Round™ Spiral Duct Liner Introduced by CertainTeed

PPG's Chopped Strand Product Expanded with New Offerings

3B OFFERS SUPERIOR ROVINGS FOR MANUFACTURING POLYESTER AND VINYL ESTER TURBINE BLADES

New range of Glass Compositions Showcased by PPG at COMPOSITES 2012

AGY and CTG/Taishan Fiberglass Enter into an Agreement

Fiber Glass Industries (FGI) Takes Over Twintex Business from Owens Corning

Johns Manville in an Expansion Mode in Slovakia

3B ACQUIRED BY INDIA'S BRAJ BINANI GROUP

MAG, Saint-Gobain Isover Issued US Patent

Devold AMT Contemplating Shift to Lithuania

Glass Fabrics Joint Venture Established by Arvind and PD Fiber Glass

Knauf Insulation Invests in Belgium to Expand its Activities

US-based Glass Fiber Reinforcements Plant Shut Down by Ahlstrom

FRP FGD Systems Offer Enhanced Performance with the use of Advantex® Glass Fiber from Owens Corning

Panasonic to Use Recycled Glass from Old Televisions for the Mass Production of Heat Insulators

LANXESS' Increased Focus on Fiber Reinforced Thermoplastics

EcoTouch™ Insulation from Owens Corning First in Attaining USDA BioPreferred Designation

Portuguese Facility of SAERTEX Expanded

Single-End Roving for Polyamide Composites from 3B

PPG, Ebtch Industrial Extend Partnership

Collaboration Between Energy Composites and SSP

New 10 Micron Glass Fiber from 3B-The Fibreglass Company

3B-THE FIBREGLASS COMPANY LAUNCHES NEW CHOPPED STRAND

New Single-End Roving for Polyamide Composites from 3B-The Fibreglass Company

PPG in JV with Harsha Exito Engineering Private Limited (India)

GRPMS, Aerovac in an Agreement

Outside Payout Applications for Thermoset Reinforcement Materials from PPG

Saint-Gobain Mulls New Glass Wool Plant in Japan

China Fiberglass Eyes Egyptian, North American Expansions

Gibson Fiberglass Acquired by Jushi Group

Johns Manville to Expand Production Capacity in Slovakia
BASF Forays into the Long Fiberglass Polyamide Market
CertainTeed, RESNET in a Strategic Collaboration
China Fiberglass Co Ltd Completes the Acquisition of Jushi Group
PPG's New Chinese Headquarters in Shanghai
Ahlstrom Aims on Chinese Wind Energy Market - Starts Production of Multi-axials
Expansion Spree from SAERTEX multiCom
Innovative Engineered Glass Fiber Products for Thermoplastic Reinforcements from Johns Manville
Preformed Acoustic Inserts for Automotive Mufflers Being Offered by Owens Corning
BauTex plans to build a glass fiber plant in Russia
ISO 9001:2008 Registration for PPG-Devold
S-3 HDI™ Glass Fiber Launched by AGY
Initial List of States for Green Environmental Plants Put Forward by Global Fiberglass Solutions, Inc
New Glass Fiber Chopped Strands from Owens Corning
Owens Corning's New Glass Fiber Plant in China
EU Reduced Import Duties on Chinese Glass Fiber
3B-THE FIBERGLASS COMPANY PROVIDES HIPER-TEX™ FOR CNG CYLINDER
Jushi & Gibson Fiberglass Offer ViPro™
CertainTeed® Sustainable Insulation™ for Commercial, HVAC Applications
CPIC Acquires Owens Corning's Brazilian Glass Reinforcements Plant
Braj Binani Group in Merger Agreement with Composite Products Inc
EcoTouch™ PINK™ FIBERGLAS™ Insulation with PureFiber™ Technology from Owens Corning
Bombardier Selects SAERTEX for its Aerospace Aircraft Programs
S-2 Glass® Reinforcement from AGY Offers New Armor Applications
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Owens Corning's Non-Woven Fiberglass Mat Production to be Expanded
3B-THE FIBERGLASS COMPANY PARTNERS WITH REPROCOVER TO OFFER SUSTAINABLE SOLUTIONS
Fiber Glass Industries Enhances Capacity
3B-THE FIBREGLASS COMPANY GAINS SOLE DISTRIBUTORSHIP OF TYCOR® W
3B-THE FIBREGLASS COMPANY, LATI ANNOUNCE A BREAKTHROUGH IN HIGH-GLOSS REINFORCED POLYAMIDE
Owens Corning to Expand Fiberglass CFM Production
Efficient and Eco-Friendly Insulation Low-E Glass Wool Introduced by KCC
Techno Compound Expands Production Capacity

Jushi's Exclusive Dealership for GRPMS in the UK
"GO EAST" on SAERTEX's Mind
BASF Forays into the Long Fiberglass Polyamide Market
Applied NanoStructured Solutions in Agreement with Owens Corning
AGY Forays into Europe
Attractive Design for new Sheraton Hotel from 3B-The Fibreglass Company
PPG's North Carolina Fiber Glass Furnace Recommences Operations
Gazechim Composites Benelux to Keep Stock of Hexcel's Product Collection in Benelux
Guardian Fiberglass Expands Operations
Philadelphia-Based Inventor Uses CertainTeed's Fiberglass Blowing Wool for Cleaning Up Gulf Oil
Johns Manville's JM Open-Cell Spray Foam Insulation Launched
French Saint-Gobain Isover Plant Inaugurated
EPETCO Obtains Loan for Fibreglass Plant in Saudi Arabia
Fulltech Fiber Glass Corp Acquires Key Position in Taiwan
CertainTeed Offers TrueComfort® Blown-In Fiberglass Insulation
OptiLiner™ Banded Liner System Introduced by Owens Corning
3B-THE FIBREGLASS COMPANY, NANOCYL SA ENTER INTO AGREEMENT
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CTC Technical Fabrics Receives Backing from WI Harper Group
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BGF INDUSTRIES (PORCHER GROUP) (USA)

CERTAINTED CORPORATION (USA)

EVANITE FIBER CORPORATION (USA)

FIBER GLASS INDUSTRIES, INC. (USA)

FIBEREX GLASS CORPORATION (CANADA)

FIBERTEC, INC (USA)

GBP SILVERCOTE INC. (USA)

GUARDIAN INDUSTRIES (USA)

HEXCEL CORPORATION (USA)

HOLLINEE, L.L.C. (USA)

JOHNS MANVILLE CORPORATION (USA)

JPS INDUSTRIES, INC. (USA)

KNAUF INSULATION (USA)

LAUSCHA FIBER INTERNATIONAL CORP (USA)

LEWCO SPECIALTY PRODUCTS, INC (USA)

MANSON INSULATION, INC. (CANADA)

NYCON CORP (USA)

OWENS-CORNING (USA)

PPG FIBER GLASS (PPG INDUSTRIES) (USA)

PPG-DEVOLD LLC (USA)

QUIETFLEX MANUFACTURING COMPANY L.P. (USA)

SUPERIOR FIBERS, L.L.C. (USA)

UPF CORPORATION (USA)

V2 COMPOSITES (USA)

VECTORPLY CORPORATION (USA)

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 - AHLSTROM GLASSFIBRE OY (FINLAND)
 - ASGLATEX OHORN GMBH (GERMANY)
 - CHOMARAT (FRANCE)
 - DEVOLD AMT AS (NORWAY)
 - DIPEX SPOL. S R.O. (SLOVAKIA)
 - EUROFIBRE SPA (ITALY)
 - FORMAX (UK) LTD (UNITED KINGDOM)
 - GLAVA A/S (NORWAY)
 - GUNTHER KAST GMBH (GERMANY)
 - H.K.O. ISOLIER-UND TEXTILTECHNIK GMBH (GERMANY)
 - JSC POLOTSK STEKLOVOLOKNO (REPUBLIC OF BELARUS)
 - JSC VALMIERAS STIKLA SKIEDRA (LATVIA)
 - KNAUF INSULATION GMBH (GERMANY)
 - LANXESS AG (GERMANY)
 - P-D GLASSEIDEN GMBH (PD FIBREGLASS GROUP) (GERMANY)
 - SAERTEX GMBH & CO. KG (GERMANY)
 - SAGER AG (SWITZERLAND)
 - SAINT-GOBAIN (FRANCE)
 - SAVEGUARD (UK) LTD (UNITED KINGDOM)

SCHWENK D?MMTECHNIK GMBH & CO KG (GERMANY)

SELCOM S.R.L. (ITALY)

SUPERGLASS INSULATION LTD. (UNITED KINGDOM)

TISSA GLASWEBEREI AG (SWITZERLAND)

UNION LESNI BRANA A.S. (CZECH REPUBLIC)

URSA INSULATION S.A (URALITA GROUP) (SPAIN)

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3.3 Major Market Players

ASAHI FIBER GLASS CO., LTD (JAPAN)

BAOTEK INC. (TAIWAN)

BEIJING JIN HAIYAN GLASS WOOL CO., LTD. (CHINA)

BYUCKSAN CORPORATION (SOUTH KOREA)

CENTRAL GLASS CO LTD (JAPAN)

CHANGZHOU PRO-TECH INDUSTRY CO LTD (CHINA)

CHANGZHOU ZHONGXIN TIANMA FIBERGLASS PRODUCTS CO., LTD (CHINA)

CHINA FIBERGLASS CO. LTD. (JUSHI GROUP) (CHINA)

CHINA IKING INDUSTRIAL GROUP CO.,LTD. (CHINA)

CHINA PASIA INDUSTRIES (CHINA)

CHINA YANGZHOU GUOTAI FIBERGLASS CO., LTD (CHINA)

CHONGQING POLYCOMP INTERNATIONAL CORP (CPIC FIBERGLASS) (CHINA)

COLAN PRODUCTS PTY LIMITED (AUSTRALIA)

CSR BRADFORD INSULATION (Australia)

FIBRECN INTERNATIONAL CO LTD (CHINA)

FLETCHER INSULATION (AUSTRALIA)

FULLTECH FIBER GLASS CORP (TAIWAN)

GLOTECH INDUSTRIAL CORP (TAIWAN)

GOA GLASS FIBRE (BINANI GROUP) (INDIA)

HANKUK FIBER GLASS CO. LTD. (SOUTH KOREA)
HANKUK HANISO CO., LTD. (SOUTH KOREA)
HEBEI HUAMEI GROUP CO. LTD. (CHINA)
HEZE TIANYUAN FIBREGLASS CO., LTD (CHINA)
HUATEK FIBERGLASS CO., LTD (CHINA)
JIANGSU CHANGHAI COMPOSITE MATERIALS HOLDING (CHINA)
JIANGSU JIUDING NEW MATERIAL CO., LTD (CHINA)
KCC CORPORATION (SOUTH KOREA)
KUSH SYNTHETICS PVT LTD (INDIA)
LANGFANG GERUI GLASS WOOL PRODUCTS CO., LTD (CHINA)
LIH FENG JIING ENTERPRISE CO., LTD (TAIWAN)
MAG-ISOVER K.K. (JAPAN)
MICROFIBER INDUSTRIES LTD (THAILAND)
NIPPON ELECTRIC GLASS CO LTD (JAPAN)
NIPPON SHEET GLASS CO., LTD (JAPAN)
NITTO BOSEKI CO LTD (JAPAN)
NITTOBO ASCO GLASS FIBER (TAIWAN)
PFG FIBER GLASS CORPORATION (TAIWAN)
PGF INSULATION Sdn. Bhd. (MALAYSIA)
POLYCORE TECHNOLOGY CO., LTD (CHINA)
PPG SINOMA JINJING FIBER GLASS (ZIBO) (CHINA)
SAINT-GOBAIN ISOVER (GU'AN) GLASS WOOL CO LTD (CHINA)
SHANDONG SHENGHAO YUXIN GLASSFIBER CO LTD (CHINA)
SHANGHAI FLAT GLASS FACTORY (CHINA)
SICHUAN WEIBO NEW MATERIAL GROUP CO LTD (CHINA)
SINOMA JINJING FIBERGLASS CO., LTD.(CHINA)
SIPLA SOLUTIONS (INDIA)
SRM (INDIA) LTD. (INDIA)
SUNTEX COMPOSITE INDUSTRIAL CO., LTD (CHINA)
TAISHAN FIBERGLASS INC (CTG) (CHINA)
TAIWAN GLASS INDUSTRY CORPORATION (TAIWAN)
TEXAS FIBERGLASS GROUP (HONG KONG)
TWIGA FIBERGLASS LTD (INDIA)
UNITIKA LTD (JAPAN)
XINGTAI JINNIU FIBERGLASS CO. LTD. (CHINA)
YIKELONG GLASS WOOL PRODUCTS COL., LTD (CHINA)

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4.3 Major Market Players

ABAHSAIN FIBERGLASS M.E., W.L.L. (KINGDOM OF BAHRAIN)

ARABIAN FIBERGLASS INSULATION COMPANY, LTD. (SAUDI ARABIA)

CAM ELYAF SANAYII AS (SISECAM GROUP) (TURKEY)

EASTERN PETROCHEMICAL COMPANY (EPETCO) (SAUDI ARABIA)

GULF GLASS FIBER TECHNOLOGICAL INDUSTRIES COMPANY (FIBERTECH)
(SAUDI ARABIA)

IZOCAM TICARET VE SANAYI AS (TURKEY)

KUWAIT INSULATING MATERIAL MANUFACTURING CO., (KIMMCO) (KUWAIT)

METYX (TURKEY)

NOVGOROD GLASS FIBER PLANT JSC (RUSSIA)

ODE YALITIM SANAYI VE TICARET A.S. (TURKEY)

TEXIGLASS IND?STRIA E COM?RCIO T?XTIL LTDA (BRAZIL)

TOPRAK KAGIT SANAYI A.S. (TURKEY)

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