

# Global and China Automotive Glass Industry Report, 2009

<https://marketpublishers.com/r/G1EAE83799CEN.html>

Date: March 2010

Pages: 89

Price: US\$ 1,900.00 (Single User License)

ID: G1EAE83799CEN

## Abstracts

With the recovery of global economy, the world's automobile industry which ever suffered a lot rebounds slowly. China has become the largest automobile market all over the world, and Chinese auto glass industry maintains quite a rapid growth. In a relative sense, glass industry is a mature and relatively stable sector. Glass, due to its fragility, is distributed by sales radius, for instance, around 200 km for the marketing of automotive glass.

There is a rather high concentration degree in global automotive glass market. Asahi Glass, a subsidiary of Mitsubishi Group, is the largest glass company around the globe. This is because of considerable output of Japanese automakers and peculiar closeness of Japanese companies. NSG ranks second from previously the eleventh by acquiring a British glass maker Pilkington, from which auto glass business of NSG is derived, but its operating efficiency still desires to be much improved, and it suffers heavy losses, even its sales revenue drops strikingly.

France-based Saint-Gobain ranks third, and it belongs to Top 500 in the world, with the annual revenue of nearly EUR40 billion, but its glass business only takes a small portion. Saint-Gobain cooperates with South Korean enterprises closely. The rapid development of Hyundai-KIA brings much sales revenue to Saint-Gobain. Next, the USA-based Guardian ranks fourth, and it is the third largest private company in the world, but with information rarely disclosed; Guardian seldom expands production and has not yet established any production base in China.

PPG ranks fifth, a well-known paint company in the world. In 2008, it got rid of its loss-making auto glass business, but it still holds 40% stake. Fuyao Group occupies a dominating position in China since its well-developed marketing network. Xinyi Glass

focuses on export and after-sale market, and its OEM clients are mainly Chery and JAC. It is worth mentioning that the fifth largest glass company Taiwan Glass has invested US\$120 million to establish an automotive glass production base in Yancheng with Kia recently.

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