

# Global and China Glass Fiber Industry Report, 2012-2015

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## Abstracts

In 2011, the global glass fiber supply hit 4.88 million tons, and the demand reached 4.66 million tons. Driven by the demand in emerging markets, the global supply is expected to grow by more than 8% to 5.30 million tons, and demand will amount to 4.94 million tons at a growth rate of 6% in 2012.

With the transfer of the industry, China has become the world's largest producer of glass fiber. In 2011, China produced 3.72 million tons of glass fiber, accounting for 76% of the global total. China's glass fiber output will grow to 4.30 million tons in 2012, sharing 81% of the global output. As 16 Chinese fiberglass kilns enter the cold repair period as well as the backward capacity is eliminated, China's glass fiber capacity will reduce by 250,000 tons or so in 2013. With the new realization of new capacity and the rebounding of downstream demand, the production will resume its growth during 2014-2015.

Like the global glass fiber industry, Chinese glass fiber market is also featured with high concentration, most of the capacity is concentrated in China Fiberglass Co., Ltd., Chongqing Polycomp International Corporation and Taishan Fiberglass Inc.. In 2012, these three companies altogether contribute 43% to the total glass fiber capacity in China. As the new capacity puts into production, it is expected that the capacity of the three companies will account for 49% of China's glass fiber capacity in 2015.

China Fiberglass Co., Ltd. is the largest glass fiber manufacturer in China, with main products including twistless roving, chopped strand and electronic-grade glass fiber yarn. To avoid the anti-dumping policies of other countries against China, China Fiberglass has expanded its operations in overseas markets and successively established companies in Singapore, France, Japan, South Africa and other nations

since 2010. In January 2012, China Fiberglass made investment for construction of an alkali-free glass fiber wiredrawing production line in Egypt; in October 2012, it built a 100,000 t/a alkali-free glass fiber wiredrawing production line in the United States. The foreign market layout helps China Fiberglass evade trade protectionism and raise overseas market share.

Taishan Fiberglass Inc, as the third largest glass fiber enterprise in China, has the similar product line to China Fiberglass, and it focuses on twistless roving and electronic-grade textile yarn. However, unlike China Fiberglass, Taishan Fiberglass enhances its exploration of domestic Chinese market, especially emerging application fields. In April 2012, Taishan Fiberglass obtained the S-1 HM high-performance glass twistless roving capacity of US-based AGY. Such twistless roving is mainly used for wind power generation. In the arena of wind power, Taishan Fiberglass has such regular customers as Sinomatech Wind Power Blade Co. Ltd., Lianyungang Zhongfu Lianzhong Composites Group, etc..

**The report covers the followings:**

Global glass fiber supply and demand, competition pattern, and forecast for 2013-2015;

China's glass fiber supply and demand, competition pattern, import and export, as well as forecast for 2013-2015;

Development of glass fiber products in China, as well as competitive landscape of major market segments;

Development of Chinese glass fiber downstream market, demand for glass fiber in 2011-2015;

Development, capacity construction and development strategy of major glass fiber manufacturers in China and beyond.

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