

Research Report on Auto Glass Industry in China, 2018-2022

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Abstracts

Description

As an important component of a vehicle, auto glass is mainly applied in new automobile manufacturing market and automobile repairing market. In this sense, demand of auto glass is closely related to the production volume and reserve volume of automobiles.

According to CRI, China has been the largest automobile manufacturer and the largest distributor of new automobiles for 8 years since 2009. In 2016, the production volume of new automobiles reached 28.12 million, accounting for 29.6% of global production volume. The sales volume of automobiles reached approximately 28.03 million, accounting for 29.9% of global sales volume. In the same year, the automobile reserve volume was about 193 million in China, accounting for 14.5% of global reserve volume. Increasing production and sales volumes as well as the reserve volume of automobiles bring huge growth potential to the auto glass market in China.

Global auto glass market is highly monopolized. Leading enterprises, such as AGC Group, NSG Group, Fuyao and Saint-Gobain, occupy most of the market shares.

According to CRI, the market demand of China's auto glass industry increases at an average annual rate of above 10% owing to the rapid development of its automobile industry in recent years. In 2016, demand for auto glass in China exceeded 160 million square meters and the market size exceeded CNY 20 billion. China experiences year-by-year increases in the export volume of auto glass, which is attributed to cost advantages of Chinese auto glass manufacturers over international competitors. In 2016, the export value of auto glass was USD 817 million in China with a trade surplus of USD 690 million. From the perspective of the export value, top three export

destinations of auto glass were the U.S., Japan and Germany, among which China exported auto glass of USD 263 million to the U.S.

CRI analyzes some characteristics of the auto glass industry different from other automotive component industries. For example, the OEM market has high barriers to entry and long authentication circle. It usually takes 2-3 years for enterprises to acquire whole vehicle supporting orders. Also, whole vehicle manufacturers require high-standard R&D, logistics supply, product quality and manufacturing techniques while OEM market has large demand and a high concentration rate. The cooperation usually lasts long once established.

In China, despite a variety of domestic automobile brands, a single type of automobiles is produced in a small volume, which demands auto glass in a small batch and multi categories. With the development of auto glass manufacturing techniques and increasing demand of driving experience and functions, there is a rising trend of unit demand for auto glass. In the 1990s, each automobile needed less than 3 square meter auto glass on average, while this figure exceeds 5 square meters in 2017. The increase in the average consumption of auto glass is mainly caused by increased inclination of front windshield for broader vision and prevalence of auto sunroof.

By the end of 2017, the average automobile reserve volume will be less than 200 per 1,000 people in China, far lower than the figure of 600-900 per 1,000 people in developed countries. Both Chinese automobile market and auto glass market have huge development potentials as economy develops. From 2017 to 2021, the annual growth rate of China's auto glass demand is expected to remain above 10%.

According to CRI, the CAGR of global automobile production volume is expected to reach 3.0% and the CAGR of global automobile reserve volume is estimated to approach 3.6% from 2017 to 2021. It can be forecasted that automobile aftermarket will play an important role in the development of auto glass market with the growth rate of global automobile production volume slowing down.

Readers can obtain the following information or more through this report:

Analysis on Auto Glass Industry Chain

Major Driving Forces and Market Opportunities in Auto Glass Industry

Risks and Challenges Faced by Auto Glass Industry

Analysis on Supply and Demand in China's Auto Glass Industry

Market Competition Status of Auto Glass Industry

Production Cost Trend and Price Trend of Auto Glass

Major Auto Glass Manufacturers of Global Market

Prospect of Auto Glass Industry, 2018-2022

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