

Laminated Glass Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Material Type (Polyvinyl Butyral, Ethyl Vinyl Acetate, Ionoplast Polymer and Others), By Application (Automobile Windshields, Bank Security & ATM Booths, Jewellery Shops, Residential Buildings and Others), By End Use Industry (Building & Construction, Automotive, Solar Panels and Others), By Region, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

The Global Laminated Glass Market, valued at USD 22.95 billion in 2022, is experiencing a steady growth rate with a Compound Annual Growth Rate (CAGR) of 5.37% during the forecast period. Laminated glass is gaining prominence in the construction industry due to its remarkable features, which encompass enhanced safety and security, noise pollution reduction, emissions reduction, and protection against natural disasters. This type of glass retains its integrity during catastrophic events such as hurricanes or earthquakes, thereby minimizing the risk of injuries and fatalities resulting from shattered windows or windshields.

Moreover, the increasing automobile production serves as a significant driver for the laminated glass market. Laminated glass finds specific application in car windshields, providing optimal protection in case of accidents.

Laminated Glass, reinforced with a polymer, offers superior safety compared to regular

glass. Unlike conventional glass, laminated glass doesn't shatter upon impact, reducing the risk of severe injuries caused by shattered shards. The growing emphasis on safety in the construction industry has led to an increased demand for laminated glass, a trend that is expected to persist in the foreseeable future.

Key Market Drivers

Increasing Emphasis on Automotive Safety and Regulations

The global laminated glass market is experiencing significant growth driven by several key factors, with one of the most notable being the increasing focus on automotive safety and regulations. Laminated glass plays a pivotal role in enhancing safety in automobiles, making it a crucial component for manufacturers and regulatory bodies alike.

As urbanization continues to rise, so does the number of vehicles on the road. This, coupled with the growing reliance on automobiles for daily commuting, underscores the importance of ensuring the safety of passengers and pedestrians. Laminated glass offers superior protection compared to traditional tempered glass, as it is designed to remain intact even when shattered. In the event of an accident, laminated glass prevents sharp shards from flying, significantly reducing the risk of injuries.

Furthermore, stringent safety regulations and standards imposed by governments and international bodies have compelled automotive manufacturers to adopt laminated glass as a standard feature in their vehicles. For example, the United Nations Economic Commission for Europe (UNECE) has introduced regulations mandating the use of laminated glass in various parts of vehicles, such as windshields, to improve occupant safety.

In addition to regulatory pressure, there has been a substantial increase in consumer awareness and demand for safer vehicles. Modern consumers are increasingly well-informed about the safety features in automobiles, and laminated glass has become a key selling point for car manufacturers. As a result, automakers are making significant investments in incorporating laminated glass into their product lines, thereby driving the demand for laminated glass in the automotive sector.

Overall, the growing emphasis on automotive safety and the stringent regulations governing it are propelling the growth of the global laminated glass market. With the continuous evolution of safety standards and consumer expectations, laminated glass is

expected to remain a critical component of the automotive industry for years to come.

Growth in the Construction Industry and Urbanization

Another significant driver fueling the growth of the global laminated glass market is the expansion of the construction industry and the ongoing process of urbanization. With the increasing migration of people to urban areas worldwide, there is a soaring demand for modern infrastructure and architectural marvels. Laminated glass has emerged as a crucial component in architectural design, promoting both aesthetics and safety.

The rise of urbanization has led to the construction of skyscrapers, high-rise buildings, and innovative structures that extensively utilize glass facades. Architects and developers prefer laminated glass due to its ability to provide transparency, sound insulation, and resistance to breakage. It not only enhances the aesthetics of buildings but also ensures the safety of occupants.

Furthermore, the need for sustainable and energy-efficient buildings has driven the adoption of laminated glass. Advanced coatings can be applied to this type of glass to improve heat insulation, reducing the energy consumption of buildings for heating and cooling purposes. Governments and environmental agencies worldwide are actively promoting the use of laminated glass in construction projects, further boosting its market.

Moreover, laminated glass finds applications in interior design, such as glass partitions and balustrades, due to its safety features and aesthetic appeal. This extends its usage beyond external building facades, contributing to overall market growth.

In regions with extreme weather conditions, laminated glass is considered a necessity to withstand hurricanes, typhoons, and severe storms. This has resulted in a surge in demand for laminated glass in areas prone to natural disasters, creating new growth opportunities for manufacturers.

In summary, the expansion of the construction industry, the trend of urbanization, and the demand for safe and sustainable buildings are driving the growth of the global laminated glass market. As architectural designs continue to evolve and environmental concerns persist, laminated glass is poised for sustained demand in construction applications.

Increasing Adoption in Electronics and Solar Panels

The global laminated glass market is currently experiencing substantial growth, primarily fueled by the increasing adoption of laminated glass in the electronics industry and solar panel manufacturing. This diversification of applications has significantly expanded the market's reach and driven the demand for this versatile material.

Within the electronics sector, laminated glass finds extensive use in touchscreens, display panels, and other electronic device components. Its exceptional durability, scratch resistance, and light transmission properties make it an ideal choice for protecting sensitive electronic equipment. As consumer electronics continue to advance in terms of technology and design, the demand for high-quality laminated glass in this sector is steadily rising.

Moreover, the solar energy industry is witnessing remarkable growth, attributed to the global shift towards renewable energy sources. Laminated glass plays a crucial role in the manufacturing of solar panels, serving as a protective cover for solar cells, safeguarding them from environmental factors such as dust, moisture, and UV radiation. With the increasing demand for solar panels driven by environmental concerns and government incentives, the laminated glass market is benefiting significantly from this expansion.

The integration of laminated glass in photovoltaic modules not only ensures the longevity and efficiency of solar panels but also enhances their aesthetics. Building-integrated photovoltaics (BIPV) are gaining popularity, and incorporating laminated glass with embedded solar cells seamlessly into building designs contributes to energy generation while maintaining visual appeal.

Additionally, the automotive industry is exploring the potential use of laminated glass in electric vehicles (EVs) and autonomous vehicles. Laminated glass holds promise as a substrate for heads-up displays (HUDs) and advanced driver-assistance systems (ADAS), offering growth opportunities in this sector.

In conclusion, the diversification of applications, including electronics, solar panels, and potential automotive innovations, serves as a significant driver of growth in the global laminated glass market. As technology continues to advance and environmental considerations shape industries, laminated glass is expected to play an increasingly vital role in various sectors beyond its traditional uses.

Key Market Challenges

Competition from Alternative Materials

One of the key challenges confronting the global laminated glass market is the relentless competition from alternative materials, particularly in the construction and automotive sectors. While laminated glass offers a distinct combination of safety, transparency, and durability, there are other materials that continue to pose a threat to its market dominance.

In the construction industry, laminated glass competes with materials such as polycarbonate and acrylic. Polycarbonate, in particular, is renowned for its impact resistance and lightweight properties, making it an attractive choice for architects and developers. Despite the superior UV resistance and fire safety of laminated glass, the affordability and versatility of polycarbonate have led to its increased usage in certain applications.

Likewise, in the automotive sector, laminated glass faces competition from emerging materials and technologies. Advanced composites, like carbon fiber-reinforced plastics, are gaining popularity as automakers strive to reduce vehicle weight and enhance fuel efficiency. Although these materials offer weight savings, they lack the impact resistance and safety features of laminated glass.

To tackle this challenge, laminated glass manufacturers must continuously innovate and enhance their product offerings. This may involve developing laminated glass with improved properties, such as lighter weight or better thermal insulation, to maintain a competitive edge against alternative materials. Additionally, effective marketing and education about the unique benefits of laminated glass are crucial to ensure that architects, engineers, and consumers comprehend its advantages.

Cost and Price Sensitivity

Cost and price sensitivity pose a significant challenge for the global laminated glass market. While laminated glass is valued for its safety and performance characteristics, it often comes at a higher price compared to traditional glass or alternative materials. This pricing disparity can discourage potential customers, especially in price-sensitive markets.

In the construction industry, project budgets are a critical consideration. Developers and builders may choose conventional glass or alternative materials to reduce costs,

particularly for large-scale projects where cost savings per unit can be substantial. This cost-sensitive approach can limit the adoption of laminated glass, even when its safety and energy efficiency benefits are acknowledged.

Likewise, in the automotive sector, where cost efficiency is paramount for manufacturers, the higher price of laminated glass can hinder its adoption. Mass-producing vehicles with laminated glass can significantly increase production costs, which may then be passed on to consumers. This can put automakers at a price disadvantage in highly competitive markets.

To address this challenge, laminated glass manufacturers need to explore cost-effective production methods, such as optimizing manufacturing processes and sourcing materials efficiently. Additionally, partnerships and collaborations with builders, architects, and automotive manufacturers can help find ways to integrate laminated glass while staying within budget constraints.

Regulatory and Compliance Hurdles

The global laminated glass market encounters a complex landscape of regulations and compliance standards that exhibit significant variations across different regions. Navigating these regulatory hurdles poses a substantial challenge for manufacturers, particularly when venturing into new markets or developing innovative laminated glass products.

Within the construction industry, building codes and safety regulations diverge across countries and regions. Meeting these diverse requirements necessitates tailored product specifications, testing, and certifications. Non-compliance with local regulations can impede market entry and expansion endeavors.

Similarly, the automotive sector experiences continuous updates and changes in safety standards and regulations. Manufacturers must ensure that their laminated glass products meet the latest automotive safety standards and crash test requirements in various markets. Keeping abreast of these evolving standards can be both costly and time-consuming.

To address these challenges, laminated glass manufacturers must invest in regulatory compliance expertise and engage with local authorities and certification bodies in target markets. Collaborating with industry associations and staying well-informed about evolving regulations is crucial for maintaining compliance. Additionally, developing

adaptable product designs that can meet a range of regulatory requirements can enhance market flexibility and competitiveness.

In conclusion, the global laminated glass market faces significant challenges, including competition from alternative materials, cost and price sensitivity, and regulatory and compliance hurdles. Overcoming these challenges will necessitate ongoing innovation, strategic partnerships, and a profound understanding of market dynamics and regional regulations.

Key Market Trends

Increased Demand for Energy-Efficient Laminated Glass

One notable trend in the global laminated glass market is the increasing demand for energy-efficient laminated glass products. As the construction and automotive industries place greater emphasis on sustainability, laminated glass is evolving to meet these demands by providing enhanced thermal performance.

In the construction sector, energy-efficient laminated glass is gaining popularity due to its ability to contribute to green building certifications, such as LEED (Leadership in Energy and Environmental Design). These laminated glass products often incorporate low-emissivity (Low-E) coatings and inert gas fills between glass layers to enhance insulation properties. This leads to reduced heat transfer, improved temperature control within buildings, and ultimately lower energy consumption for heating and cooling. With governments worldwide implementing stricter energy efficiency regulations, the adoption of energy-efficient laminated glass is expected to continue its upward trajectory.

A similar trend is emerging in the automotive industry as electric vehicles (EVs) gain momentum. EV manufacturers are striving to optimize the energy efficiency of their vehicles to extend driving range. Laminated glass with advanced thermal insulation properties can help minimize the energy required to heat or cool the interior of electric vehicles, thereby contributing to longer battery life and improved overall efficiency. As the global automotive industry undergoes a significant shift towards electric mobility, the demand for energy-efficient laminated glass in this sector is anticipated to experience substantial growth.

The increasing focus on energy-efficient laminated glass aligns with the broader sustainability movement and regulatory efforts to reduce carbon emissions.

Manufacturers in the laminated glass market are likely to prioritize the development of innovative products that offer superior thermal performance while maintaining safety and optical clarity.

Growth in Smart Glass Applications

Another significant trend that is shaping the global laminated glass market is the increasing integration of smart glass technologies into laminated glass products. Smart glass, also known as switchable or dynamic glass, has the ability to adjust its transparency or opacity in response to external factors such as light, heat, or electrical voltage. This technology is finding applications in both the construction and automotive sectors, thereby driving the demand for laminated smart glass.

In the construction industry, the use of smart glass offers several advantages. It can enhance occupant comfort by automatically adjusting the amount of sunlight entering a space, thereby reducing glare and heat gain. Moreover, smart glass contributes to energy efficiency by reducing the need for blinds or curtains, allowing natural light to penetrate deeper into buildings. As architects and developers search for innovative solutions to create sustainable and comfortable spaces, the adoption of laminated smart glass is expected to witness substantial growth.

In the automotive industry, laminated smart glass finds applications in sunroofs, windows, and rearview mirrors. It provides adjustable shading and privacy features, thereby enhancing the overall driving experience. As automotive manufacturers incorporate more advanced infotainment and driver-assistance systems, the use of laminated smart glass for heads-up displays (HUDs) and augmented reality (AR) applications continues to gain momentum.

The growth of smart glass in the laminated glass market represents a convergence of technology and design, offering new possibilities for energy efficiency, comfort, and aesthetics.

Segmental Insights

Material Type Insights

The Polyvinyl Butyral segment holds a significant market share in the Global Laminated Glass Market. PVB interlayer technology is continuously advancing, enabling laminated glass to offer additional functionalities. Sound insulation is a prominent feature, making

laminated glass with PVB interlayers well-suited for urban environments and effective in reducing noise pollution. Additionally, PVB interlayers can be manufactured with UV-blocking properties, providing protection against harmful UV radiation. This UV protection feature is particularly significant for automotive and architectural applications.

Research and development in PVB interlayer materials are ongoing, with manufacturers diligently working to enhance product performance. Innovations in PVB technology encompass the development of acoustic PVB interlayers for noise reduction, high-transparency PVB for optimal optical clarity, and color-tinted PVB for aesthetic purposes. These innovations cater to diverse market demands and expand the applications of laminated glass.

Environmental concerns are driving the development of eco-friendly PVB interlayers. Some manufacturers are actively working towards reducing the environmental impact of PVB production and disposal. Sustainable PVB interlayer materials that meet green building certifications are gaining traction in the market.

The production of PVB interlayer materials is primarily concentrated among a few global manufacturers. This can potentially result in supply chain challenges, especially during periods of high demand. However, efforts are underway to expand production capacity and distribution networks to meet the growing global demand for PVB interlayers.

In conclusion, the PVB segment plays a pivotal role in the growth and success of the global laminated glass market. It caters to a wide range of applications, with a strong presence in the construction and automotive sectors. Continuous innovations in PVB technology, environmental considerations, and the expansion of manufacturing and supply chain capabilities are expected to shape the future of this segment.

End Use Insights

The Iron & Steel segment holds a significant market share in the Global Laminated Glass Market. The iron and steel segment plays a pivotal role in the global laminated glass market, particularly in the production of steel frames and support structures for architectural applications. Iron and steel are vital materials that provide structural support and framing for the installation of laminated glass in various architectural elements such as windows, doors, facades, curtain walls, and skylights. These steel components ensure the stability, safety, and durability of laminated glass installations.

The construction sector is the primary consumer of iron and steel components in the

laminated glass market. The growth of the construction industry worldwide, especially in urban areas and high-rise buildings, has driven the demand for laminated glass and the accompanying iron and steel structures. The use of laminated glass in construction is motivated by safety regulations, energy efficiency requirements, and architectural trends.

In addition to their functional properties, iron and steel components can be customized to meet architectural and design preferences. Steel frames and support structures can be tailored to various design styles and aesthetics, enhancing the overall appearance of laminated glass installations. This customization capability aligns with the increasing demand for visually appealing and distinctive architectural designs.

Regional Insights

The Asia Pacific region is expected to dominate the market during the forecast period. The Asia-Pacific region is currently undergoing unprecedented urbanization, with a significant influx of people migrating from rural areas to cities. As a result, there has been a remarkable increase in construction activities, encompassing residential, commercial, and infrastructure projects. Laminated glass plays a crucial role in the construction sector, particularly in contemporary architectural designs. The robust growth of the construction industry in the region stands as a key driver for the escalating demand for laminated glass.

Furthermore, the Asia-Pacific region is home to some of the largest automotive markets globally, such as China, India, Japan, and South Korea. As the automotive industry continues to expand and evolve, there is a growing need for laminated glass in various applications, including windshields, sunroofs, and side windows. The strong emphasis on safety and comfort in automobiles further propels the utilization of laminated glass.

Safety concerns, both in construction and transportation, play a pivotal role in driving the adoption of laminated glass. Increasingly, countries in the Asia-Pacific region are recognizing the significance of safety standards and regulations. For instance, the implementation of stricter building codes and regulations related to earthquake resistance and safety in high-rise buildings has resulted in a higher adoption rate of laminated glass.

Moreover, numerous countries in the Asia-Pacific region are making substantial investments in infrastructure development, encompassing the construction of airports, bridges, and transportation networks. Laminated glass finds extensive application in

these projects, including glass facades, noise barriers, and railway station canopies. This emerging trend further contributes to the growing demand for laminated glass.

Key Market Players

AGC Inc.

Asahi India Glass Limited

Cardinal Glass Industries, Inc

Central Glass Co., Ltd.

Fuyao Group

GSC GLASS LTD

Guardian Industries Holdings

Nippon Sheet Glass Co. Ltd.

Saint-Gobain

Stevenage Glass Company Ltd.

Report Scope:

In this report, the Global Laminated Glass Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Laminated Glass Market, By Material Type:

Polyvinyl Butyral

Ethyl Vinyl Acetate

Ionoplast Polymer

Others

Global Laminated Glass Market, By Application:

Automobile Windshields

Bank Security & ATM Booths

Jewellery Shops

Residential Buildings

Others

Global Laminated Glass Market, By End Use Industry:

Building & Construction

Automotive

Solar Panels

Others

Global Laminated Glass Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Laminated Glass Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Material...

Laminated Glass Market.

Available Customizations:

Global Laminated Glass Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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14. STRATEGIC RECOMMENDATIONS

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