



**Global and China Glass Fiber Industry
Report, 2010-2012**

Nov. 2011

This report

- ◆ **Analyzes the development of global and China glass fiber industry .**
- ◆ **Focuses import and export , and downstream and upstream of glass fiber industry**
- ◆ **Highlights the operation and development of major glass fiber enterprises**

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Abstract

As an excellent composite material and important metal substitute, glass fiber has been applied to construction, transportation, electric and electronics, wind power and other industries widely. From 2000 to 2010, the global glass fiber output saw steady growth, with the annual compound growth rate of 7.2%. In 2011, the global glass fiber output will reach 4.88 million tons, and the demand will be 4.86 million tons, roughly achieving balance.

In the future, affected by sluggish capacity expansion and increasing demand, glass fiber prices will continue to rise slightly. In 2012, glass fiber will be in short supply in the world.

Before 2007, the global glass fiber production was mainly concentrated in Europe and America. With the transfer of the global industry, China's glass fiber capacity has grown, and China has become the largest glass fiber producer and consumer. China's apparent consumption of glass fiber was 800,000 tons in 2005 and 3.355 million tons in 2010; from 2005 to 2010, the average annual compound growth rate was 33.6%.

Global Glass Fiber Demand and Supply, 2008-2012
(Unit: million tons)



Source: ResearchInChina; China Fiberglass Industry Association

China glass fiber industry is featured with high dependence on export. 35% or more of the domestic glass fiber products are exported. In 2010, China exported 1.208 million tons of glass fiber, up 23.5% year on year. From January to September of 2011, China's glass fiber export volume reached 946,000 tons, up 0.32% year on year, the growth rate declined significantly. In the future, as the domestic demand continues to grow, China is expected to reduce the dependence on export.

Since the end of 2009, western countries led by the European Union have implemented anti-dumping measures against Chinese glass fiber products. The strengthened trade protection has forced Chinese glass fiber producers to make production globalization. In July 2011, Jushi Group of China Fiberglass Co., Ltd. set up a factory in Egypt; it is building an 80,000 tons / year alkali-free glass fiber pool kiln wiredrawing production line, which will put into operation at the end of 2012. In May 2011, Chongqing Polycomp International Corporation acquired OCV Capivari Fibras de Vidro Ltda, a subsidiary of Owens Corning in the Netherlands.

This report analyzes supply & demand and competition patterns of the global and China glass fiber industry. It also analyzes import, export, upstream and downstream of China glass fiber industry. In addition, it studies 3 key global companies (including Owens Corning, PPG, and Johns Manville) and 11 key Chinese enterprises (such as China Fiberglass, Chongqing Polycomp and Taishan Fiberglass).

Glass fiber industry features a high concentration degree. The top six glass fiber companies account for 77.8% of the total capacity in the world. In 2010, OCV ranked first in capacity with 1.24 million tons.

Among the glass fiber manufacturers in China, the capacity of China Fiberglass reached 935,000 tons, ranking first in China and second in the world. In the next few years, the global glass fiber capacity pattern will see little change.

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