

Coated Glass Market - Global Industry Size, Share, Trends, Opportunity, and Forecast

Segmented By Production Process (Hard Coat, Soft Coat), By Application (Architectural, Electronics, Automotive, Aerospace & Defense, and Sports & Leisure), By Function (UV Protection, Heat Protection, Water-Repellent Coating, Shatter Protection, Self- Cleaning Coatings, and Graffiti Protection), By Product (Low-E Glass, Heat Reflective), By Region, Competition 2018-2028

Market Report | 2023-11-07 | 189 pages | TechSci Research

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Report description:

Global Coated Glass Market has valued at USD 42.84 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.02% through 2028. Coated glass, also known as coated glazing or coated windows, refers to glass that has been treated with a specialized coating to enhance its properties and performance. The coating can be applied to one or more surfaces of the glass to achieve various benefits, such as improved energy efficiency, solar control, privacy, aesthetics, and durability. Coated glass is commonly used in architectural applications, automotive industry, electronics, and other sectors where specific performance characteristics are required. Coated glass plays a significant role in enhancing the energy efficiency of buildings by reducing heat gain or loss through windows. As energy conservation and sustainability gained importance, the demand for energy-efficient coated glass products, such as low-emissivity (Low-E) glass, increased. Coated glass offers various aesthetic options by providing different levels of tint, reflectivity, and color. Architects and designers use coated glass to create visually appealing structures while also addressing functional needs. Coated glass technology has enabled the development of smart glass that can switch between transparent and opaque states based on electrical currents or external stimuli. This

technology is used for privacy, glare control, and architectural design purposes.

Key Market Drivers

Rapid Urbanization

The increasing emphasis on energy efficiency and sustainable building practices drove the demand for coated glass.

Energy-efficient coatings, such as low-emissivity (Low-E) coatings, helped buildings reduce heat transfer through windows, leading to energy savings for heating and cooling. Urbanization, along with the growth of commercial and residential construction, increased the need for high-performance building materials. Coated glass, offering benefits like thermal insulation and solar control, became a preferred choice in modern architectural designs. Governments and regulatory bodies worldwide continued to introduce stricter energy efficiency standards for buildings. Coated glass, particularly those with low solar heat gain coefficients (SHGC) and high visible light transmittance (VLT), contributed to meeting these requirements.

Advancements in Glass Coating Technology

Ongoing research and development efforts led to improved coating technologies that enhanced the performance and durability of coated glass. These advancements widened the range of applications and improved the overall value proposition. Coated glass found extensive use in the automotive industry for windshields, sunroofs, and side windows. UV protection, glare reduction, and enhanced visibility were some of the key features that drove the adoption of coated glass in vehicles. The development of smart glass that can switch between transparent and opaque states based on electric current, light, or heat provided innovative solutions for privacy, energy efficiency, and aesthetic appeal. Coated glass played a vital role in electronic displays, offering features like anti-reflective coatings, touch sensitivity, and protection against scratches and environmental factors. Growing awareness among consumers about the benefits of energy-efficient and environmentally friendly materials led to an increased preference for coated glass in both residential and commercial buildings. Innovations in Architectural Design: Architects and designers increasingly sought materials that offered both functionality and aesthetics. Coated glass, with its ability to provide various tints, colors, and levels of reflectivity, aligned with these design trends. As the automotive market continued to expand, particularly in emerging economies, the demand for coated glass in vehicles also increased, driven by factors like comfort, safety, and aesthetic appeal. Coated glass with privacy-enhancing features, such as obscured or frosted appearance on demand, catered to the need for enhanced privacy and security in both residential and commercial spaces.

Key Market Challenges

High Cost of Coated Glass

Coated glass products often come with higher initial costs compared to regular glass due to the added cost of coating technologies. This can be a deterrent for some buyers, particularly in price-sensitive markets. The manufacturing processes involved in applying specialized coatings to glass can be complex and require precision. This complexity can lead to production challenges, quality control issues, and increased costs. The long-term durability and performance of coated glass products are crucial considerations. Challenges include maintaining the integrity of coatings over time, resistance to scratching or abrasion, and the potential for degradation due to exposure to environmental factors.

Compatibility with Architectural Design

While coated glass offers functional benefits, its appearance and characteristics might not always align with specific architectural designs or historical preservation requirements, limiting its adoption in some projects. Limited Customization Options: Some types of coated glass may have limited customization options in terms of tint, color, and other visual aspects, which can pose challenges for architects and designers seeking unique aesthetics. Coated glass often involves multiple layers of manufacturing and processing, including glass production, coating application, and further fabrication. Coordinating these stages in the supply chain can be challenging. Coated glass is valued for its energy-efficient properties, but improper installation or use can impact its effectiveness. Ensuring that coated glass products are installed and maintained correctly to retain their energy-saving benefits can be a challenge. Educating consumers, architects, builders, and contractors about the benefits and proper use of coated glass can be a challenge. Increasing awareness and knowledge about different coating options and their advantages is important for market growth. Developing and adhering to performance standards and regulations for coated glass can be complex due to the diversity of coating technologies, applications, and local building codes.

Key Market Trends

Energy Efficiency and Green Building

The trend toward sustainable and energy-efficient building practices was driving the demand for coated glass. Low-emissivity (Low-E) coatings and other energy-efficient solutions were increasingly sought after for their ability to reduce energy consumption in buildings. The development of smart glass, capable of changing its transparency based on external factors such as light, heat, or electric current, gained traction. Smart glass offered improved control over light and privacy, enhancing user comfort and energy efficiency. Dynamic glazing, which can change its tint or transparency based on environmental conditions, saw increased adoption in both residential and commercial buildings. This technology allowed for better management of natural light and heat gain. Coated glass continued to be a favored material for architects and designers due to its ability to offer various tints, colors, and reflectivity levels. It allowed for innovative and visually appealing building designs.

Urbanization and High-Rise Buildings

The growth of urban centers and high-rise buildings in urban areas increased the demand for coated glass products that offer both functional benefits and aesthetic appeal. Technological advancements enabled digital printing directly onto glass surfaces. This trend allowed for customized designs, patterns, and branding on coated glass, expanding its applications in interior design and architecture. Coated glass with enhanced safety features, such as laminated or tempered glass with specialized coatings, gained popularity for applications in areas prone to natural disasters or security threats. The trend of retrofitting existing buildings for energy efficiency led to the adoption of coated glass solutions as a way to improve insulation and reduce energy consumption. Coated glass in the automotive sector evolved to offer not only energy-efficient properties but also advanced features like heads-up displays, HUD-compatible coatings, and coatings that improve visibility.

Focus on Noise Reduction

The COVID-19 pandemic highlighted the importance of indoor air quality and hygiene. Coated glass solutions with antimicrobial or easy-to-clean properties gained attention in public spaces and healthcare facilities. Coated glass products designed to reduce external noise transmission gained interest, especially in urban environments with high levels of noise pollution. Coated glass products that could integrate with building automation systems for adaptive control of lighting, shading, and HVAC systems saw increased adoption for enhanced occupant comfort. Stringent building codes and energy efficiency regulations drove the adoption of coated glass products that met or exceeded the required standards.

Innovation in Coating Materials: Research into new coating materials and technologies aimed at improving performance, durability, and sustainability of coated glass products.

Segmental Insights

Production Process Insights

Soft coating segment held the largest revenue share of over 60.0% in 2021 and is also projected to grow at the fastest rate over the forecast period. The significant factor driving the growth of the soft coating segment is its ultra-low emissivity, which enables it to reflect considerably more heat than hard coated products. Furthermore, the soft-coated product is characterized by more visible light transmission and higher optical clarity as compared to hard-coated products.

Application Insights

The architectural applications segment accounted for the largest volume share in 2021 ? over 92.0% ? and is expected to remain dominant during the forecast period. Coated glass enables very low energy consumption and reduces the cost of air conditioning in architecture. This is done in warmer climates by reflecting heat from outside the building. It is therefore seen as an innovative product that improves building energy efficiency by reducing AC costs and reducing CO2 emissions.

Regional Insights

The Asia Pacific region has established itself as the leader in the Global Coated Glass Market with a significant revenue share in 2022 . The expansion of the covered glass market is also driven by the increase in the number of construction projects, the transfer of production facilities from other regions to Asian countries, the increase in investment in the automotive industry and the increase in the production of solar panels region. The coated glass industry is projected to benefit from the growth of automotive production in the Asia-Pacific region. Automakers began to incorporate coated glass into vehicles, especially luxury cars, although tinted glass was not widely used in the automotive industry. Significant cost advantages in Asian countries could help expand car production.

Key Market Players

Saint-Gobain S.A

AGC Inc

Guardian Industries

NSG Group

PPG Industries

SCHOTT AG

Vitro, S.A.B. de C.V

Asahi Glass Co., Ltd

Euroglas GmbH

Xinyi Glass Holdings Limited.

Report Scope:

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

? Global Coated Glass Market, By Production Process:

o Hard Coat

o Soft Coat

? Global Coated Glass Market, By Application:

o Architectural

o Electronics

o Automotive

o Aerospace & Defense

o Sports & Leisure

? Global Coated Glass Market, By Function:

o UV Protection

o Heat Protection

o Water-Repellent Coating

o Shatter Protection

o Self- Cleaning Coatings

o Graffiti Protection

? Global Coated Glass Market, By Product:

o Low-E Glass

o Heat Reflective

? Global Coated Glass Market, By Region:

o North America

? United States

? Canada

? Mexico

o Asia-Pacific

? China

? India

? Japan

? South Korea

? Indonesia

o Europe

? Germany

? United Kingdom

? France

? Russia

? Spain

o South America

? Brazil

? Argentina

o Middle East & Africa

? Saudi Arabia

? South Africa

? Egypt

? UAE

? Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Coated Glass Market.

Available Customizations:

Global Coated 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).

Table of Contents:

1.0 Product Overview

1.1.0 Market Definition

1.2.0 Scope of the Market

1.3.0 Markets Covered

1.4.0 Years Considered for Study

1.5.0 Key Market Segmentations

2.0 Research Methodology

2.1.0 Objective of the Study

2.2.0 Baseline Methodology

2.3.0 Key Industry Partners

2.4.0 Major Association and Secondary Sources

2.5.0 Forecasting Methodology

2.6.0 Data Triangulation & Validation

2.7.0 Assumptions and Limitations

3.0 Executive Summary

4.0 Voice of Customers

5.0 Global Coated Glass Market Outlook

5.1.0 Market Size & Forecast

5.1.1.0 By Value

5.2.0 Market Share & Forecast

5.2.1.0 By Production Process (Hard Coat, Soft Coat)

5.2.2.0 By Application (Architectural, Electronics, Automotive, Aerospace & Defense, and Sports & Leisure)

5.2.3.0 By Function (UV Protection, Heat Protection, Water-Repellent Coating, Shatter Protection, Self-Cleaning Coatings, and Graffiti Protection)

5.2.4.0 By Product (Low-E Glass, Heat Reflective)

5.2.5.0 By Region

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- 5.3.□By Company (2022)
- 5.4.□Market Map
- 6.□North America Coated Glass Market Outlook
 - 6.1.□Market Size & Forecast
 - 6.1.1.□By Value
 - 6.2.□Market Share & Forecast
 - 6.2.1.□By Production Process
 - 6.2.2.□By Application
 - 6.2.3.□By Function
 - 6.2.4.□By Product
 - 6.2.5.□By Country
 - 6.3.□North America: Country Analysis
 - 6.3.1.□United States Coated Glass Market Outlook
 - 6.3.1.1.□Market Size & Forecast
 - 6.3.1.1.1.□By Value
 - 6.3.1.2.□Market Share & Forecast
 - 6.3.1.2.1.□By Production Process
 - 6.3.1.2.2.□By Application
 - 6.3.1.2.3.□By Function
 - 6.3.1.2.4.□By Product
 - 6.3.2.□Canada Coated Glass Market Outlook
 - 6.3.2.1.□Market Size & Forecast
 - 6.3.2.1.1.□By Value
 - 6.3.2.2.□Market Share & Forecast
 - 6.3.2.2.1.□By Production Process
 - 6.3.2.2.2.□By Application
 - 6.3.2.2.3.□By Function
 - 6.3.2.2.4.□By Product
 - 6.3.3.□Mexico Coated Glass Market Outlook
 - 6.3.3.1.□Market Size & Forecast
 - 6.3.3.1.1.□By Value
 - 6.3.3.2.□Market Share & Forecast
 - 6.3.3.2.1.□By Production Process
 - 6.3.3.2.2.□By Application
 - 6.3.3.2.3.□By Function
 - 6.3.3.2.4.□By Product
 - 7.□Asia-Pacific Coated Glass Market Outlook
 - 7.1.□Market Size & Forecast
 - 7.1.1.□By Value
 - 7.2.□Market Share & Forecast
 - 7.2.1.□By Production Process
 - 7.2.2.□By Application
 - 7.2.3.□By Function
 - 7.2.4.□By Product
 - 7.2.5.□By Country
 - 7.3.□Asia-Pacific: Country Analysis
 - 7.3.1.□China Coated Glass Market Outlook

7.3.1.1.□Market Size & Forecast
7.3.1.1.1.□By Value
7.3.1.2.□Market Share & Forecast
7.3.1.2.1.□By Production Process
7.3.1.2.2.□By Application
7.3.1.2.3.□By Function
7.3.1.2.4.□By Product
7.3.2.□India Coated Glass Market Outlook
7.3.2.1.□Market Size & Forecast
7.3.2.1.1.□By Value
7.3.2.2.□Market Share & Forecast
7.3.2.2.1.□By Production Process
7.3.2.2.2.□By Application
7.3.2.2.3.□By Function
7.3.2.2.4.□By Product
7.3.3.□Japan Coated Glass Market Outlook
7.3.3.1.□Market Size & Forecast
7.3.3.1.1.□By Value
7.3.3.2.□Market Share & Forecast
7.3.3.2.1.□By Production Process
7.3.3.2.2.□By Application
7.3.3.2.3.□By Function
7.3.3.2.4.□By Product
7.3.4.□South Korea Coated Glass Market Outlook
7.3.4.1.□Market Size & Forecast
7.3.4.1.1.□By Value
7.3.4.2.□Market Share & Forecast
7.3.4.2.1.□By Production Process
7.3.4.2.2.□By Application
7.3.4.2.3.□By Function
7.3.4.2.4.□By Product
7.3.5.□Indonesia Coated Glass Market Outlook
7.3.5.1.□Market Size & Forecast
7.3.5.1.1.□By Value
7.3.5.2.□Market Share & Forecast
7.3.5.2.1.□By Production Process
7.3.5.2.2.□By Application
7.3.5.2.3.□By Function
7.3.5.2.4.□By Product
8.□Europe Coated Glass Market Outlook
8.1.□Market Size & Forecast
8.1.1.□By Value
8.2.□Market Share & Forecast
8.2.1.□By Production Process
8.2.2.□By Application
8.2.3.□By Function
8.2.4.□By Product

- 8.2.5.□By Country
- 8.3.□Europe: Country Analysis
- 8.3.1.□Germany Coated Glass Market Outlook
- 8.3.1.1.□Market Size & Forecast
- 8.3.1.1.1.□By Value
- 8.3.1.2.□Market Share & Forecast
- 8.3.1.2.1.□By Production Process
- 8.3.1.2.2.□By Application
- 8.3.1.2.3.□By Function
- 8.3.1.2.4.□By Product
- 8.3.2.□United Kingdom Coated Glass Market Outlook
- 8.3.2.1.□Market Size & Forecast
- 8.3.2.1.1.□By Value
- 8.3.2.2.□Market Share & Forecast
- 8.3.2.2.1.□By Production Process
- 8.3.2.2.2.□By Application
- 8.3.2.2.3.□By Function
- 8.3.2.2.4.□By Product
- 8.3.3.□France Coated Glass Market Outlook
- 8.3.3.1.□Market Size & Forecast
- 8.3.3.1.1.□By Value
- 8.3.3.2.□Market Share & Forecast
- 8.3.3.2.1.□By Production Process
- 8.3.3.2.2.□By Application
- 8.3.3.2.3.□By Function
- 8.3.3.2.4.□By Product
- 8.3.4.□Russia Coated Glass Market Outlook
- 8.3.4.1.□Market Size & Forecast
- 8.3.4.1.1.□By Value
- 8.3.4.2.□Market Share & Forecast
- 8.3.4.2.1.□By Production Process
- 8.3.4.2.2.□By Application
- 8.3.4.2.3.□By Function
- 8.3.4.2.4.□By Product
- 8.3.5.□Spain Coated Glass Market Outlook
- 8.3.5.1.□Market Size & Forecast
- 8.3.5.1.1.□By Value
- 8.3.5.2.□Market Share & Forecast
- 8.3.5.2.1.□By Production Process
- 8.3.5.2.2.□By Application
- 8.3.5.2.3.□By Function
- 8.3.5.2.4.□By Product
- 9.□South America Coated Glass Market Outlook
- 9.1.□Market Size & Forecast
- 9.1.1.□By Value
- 9.2.□Market Share & Forecast
- 9.2.1.□By Production Process

9.2.2.□By Application
9.2.3.□By Function
9.2.4.□By Product
9.2.5.□By Country
9.3.□South America: Country Analysis
9.3.1.□Brazil Coated Glass Market Outlook
9.3.1.1.□Market Size & Forecast
9.3.1.1.1.□By Value
9.3.1.2.□Market Share & Forecast
9.3.1.2.1.□By Production Process
9.3.1.2.2.□By Application
9.3.1.2.3.□By Function
9.3.1.2.4.□By Product
9.3.2.□Argentina Coated Glass Market Outlook
9.3.2.1.□Market Size & Forecast
9.3.2.1.1.□By Value
9.3.2.2.□Market Share & Forecast
9.3.2.2.1.□By Production Process
9.3.2.2.2.□By Application
9.3.2.2.3.□By Function
9.3.2.2.4.□By Product
10.□Middle East & Africa Coated Glass Market Outlook
10.1.□Market Size & Forecast
10.1.1.□By Value
10.2.□Market Share & Forecast
10.2.1.□By Production Process
10.2.2.□By Application
10.2.3.□By Function
10.2.4.□By Product
10.2.5.□By Country
10.3.□Middle East & Africa: Country Analysis
10.3.1.□Saudi Arabia Coated Glass Market Outlook
10.3.1.1.□Market Size & Forecast
10.3.1.1.1.□By Value
10.3.1.2.□Market Share & Forecast
10.3.1.2.1.□By Production Process
10.3.1.2.2.□By Application
10.3.1.2.3.□By Function
10.3.1.2.4.□By Product
10.3.2.□South Africa Coated Glass Market Outlook
10.3.2.1.□Market Size & Forecast
10.3.2.1.1.□By Value
10.3.2.2.□Market Share & Forecast
10.3.2.2.1.□By Production Process
10.3.2.2.2.□By Application
10.3.2.2.3.□By Function
10.3.2.2.4.□By Product

10.3.3.□UAE Coated Glass Market Outlook

10.3.3.1.□Market Size & Forecast

10.3.3.1.1.□By Value

10.3.3.2.□Market Share & Forecast

10.3.3.2.1.□By Production Process

10.3.3.2.2.□By Application

10.3.3.2.3.□By Function

10.3.3.2.4.□By Product

10.3.4.□Israel Coated Glass Market Outlook

10.3.4.1.□Market Size & Forecast

10.3.4.1.1.□By Value

10.3.4.2.□Market Share & Forecast

10.3.4.2.1.□By Production Process

10.3.4.2.2.□By Application

10.3.4.2.3.□By Function

10.3.4.2.4.□By Product

10.3.5.□Egypt Coated Glass Market Outlook

10.3.5.1.□Market Size & Forecast

10.3.5.1.1.□By Value

10.3.5.2.□Market Share & Forecast

10.3.5.2.1.□By Production Process

10.3.5.2.2.□By Application

10.3.5.2.3.□By Function

10.3.5.2.4.□By Product

11.□Market Dynamics

11.1.□Drivers

11.2.□Challenge

12.□Market Trends & Developments

13.□Company Profiles

13.1.□Saint-Gobain S.A

13.1.1.□Business Overview

13.1.2.□Key Revenue and Financials

13.1.3.□Recent Developments

13.1.4.□Key Personnel

13.1.5.□Key Product/Services Offered

13.2.□AGC Inc.

13.2.1.□Business Overview

13.2.2.□Key Revenue and Financials

13.2.3.□Recent Developments

13.2.4.□Key Personnel

13.2.5.□Key Product/Services Offered

13.3.□Guardian Industries.

13.3.1.□Business Overview

13.3.2.□Key Revenue and Financials

13.3.3.□Recent Developments

13.3.4.□Key Personnel

13.3.5.□Key Product/Services Offered

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- 13.4. NSG Group.
 - 13.4.1. Business Overview
 - 13.4.2. Key Revenue and Financials
 - 13.4.3. Recent Developments
 - 13.4.4. Key Personnel
 - 13.4.5. Key Product/Services Offered
- 13.5. PPG Industries.
 - 13.5.1. Business Overview
 - 13.5.2. Key Revenue and Financials
 - 13.5.3. Recent Developments
 - 13.5.4. Key Personnel
 - 13.5.5. Key Product/Services Offered
- 13.6. SCHOTT AG.
 - 13.6.1. Business Overview
 - 13.6.2. Key Revenue and Financials
 - 13.6.3. Recent Developments
 - 13.6.4. Key Personnel
 - 13.6.5. Key Product/Services Offered
- 13.7. Vitro, S.A.B. de C.V.
 - 13.7.1. Business Overview
 - 13.7.2. Key Revenue and Financials
 - 13.7.3. Recent Developments
 - 13.7.4. Key Personnel
 - 13.7.5. Key Product/Services Offered
- 13.8. Asahi Glass Co., Ltd.
 - 13.8.1. Business Overview
 - 13.8.2. Key Revenue and Financials
 - 13.8.3. Recent Developments
 - 13.8.4. Key Personnel
 - 13.8.5. Key Product/Services Offered
- 13.9. Euroglas GmbH.
 - 13.9.1. Business Overview
 - 13.9.2. Key Revenue and Financials
 - 13.9.3. Recent Developments
 - 13.9.4. Key Personnel
 - 13.9.5. Key Product/Services Offered
- 13.10. Xinyi Glass Holdings Limited.
 - 13.10.1. Business Overview
 - 13.10.2. Key Revenue and Financials
 - 13.10.3. Recent Developments
 - 13.10.4. Key Personnel
 - 13.10.5. Key Product/Services Offered

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