

# 2007-2008 年中国低辐射玻璃产业与市场研究报告

China Low-E Glass  
Market Report, 2007-2008

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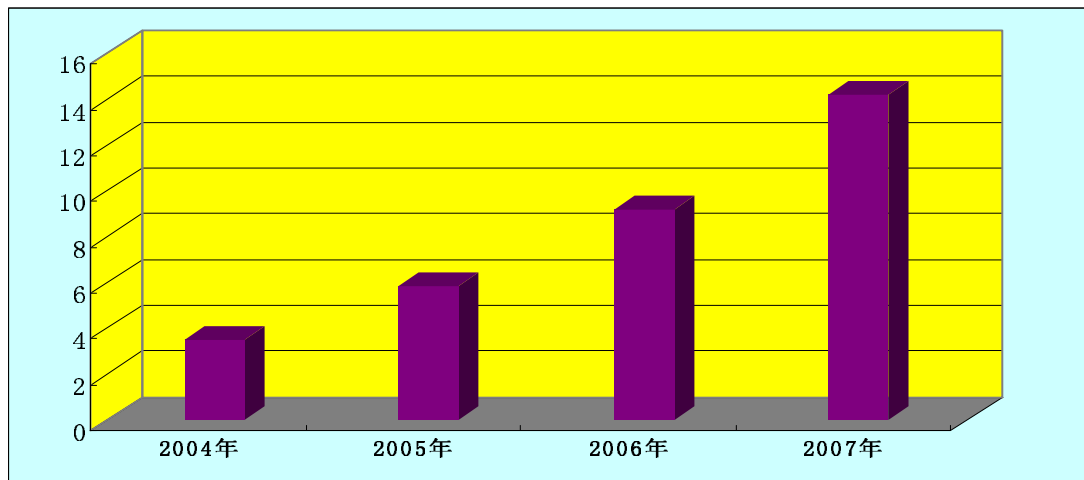
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摘要

中国是能耗大国，其中建筑能耗每年达 5 亿吨标准煤左右，占全社会能源消耗总量的 27%。建筑能耗以每年 5.84% 以上的速度增长，而建筑门窗的能耗又占建筑能耗的一半左右。由于中国长期不太重视门窗的节能，既有 440 多亿平米的建筑中，93% 以上用的是不节能的窗框和玻璃。而每年新增加 20 亿平米左右的建筑，也多是不节能的建筑。另外，数十亿平米的公共建筑和数以千万平米计的玻璃幕墙，绝大多数用的也是非节能单片玻璃或普通的中空玻璃。2008 年 4 月 1 日，中国《节能法》将全面落实实施。新的节能法在法律层面将节约资源确定为中国的基本国策。中国节能玻璃市场将有广阔的发展空间。

低辐射 (Low-E) 玻璃与普通玻璃及传统的建筑用镀膜玻璃相比，具有极高的节能效果、良好的光学性能与环保特性。然而，作为节能效果最好的 Low-E 玻璃，中国 2005 年产量为 590 万平米，2006 年为 920 万平米，不到美国 2004 年年产量六分之一。所以，中国在节能玻璃的推广应用上，与发达国家还有很大的差距。

图：2004—2007 年中国 Low-E 玻璃产量图（单位：百万平方米）



来源：水清木华研究中心

近年来，我国的低辐射玻璃产量逐年增加，Low-E 玻璃的生产线主要集中在南玻、耀华玻璃、耀皮玻璃、威海蓝星玻璃、福耀玻璃等生产企业。2007—2008 年，有越来越多的玻璃生产企业引进低辐射玻璃生产线。预计到 2010 年我国 Low-E 玻璃的需求量将达 9700 万平方米。同时我们预计，按照现有的产能扩张速度，到 2010 年底中国 Low-E 玻璃的产量将达 5000 万平方米，与庞大的需求量相比，我国 Low-E 玻璃存在非常大的产能缺口。

本研究报告依据国家统计局、中国建设部和中国建筑玻璃与工业玻璃协会等权威渠道数据。部分重点企业的数据来自公司财务报表。

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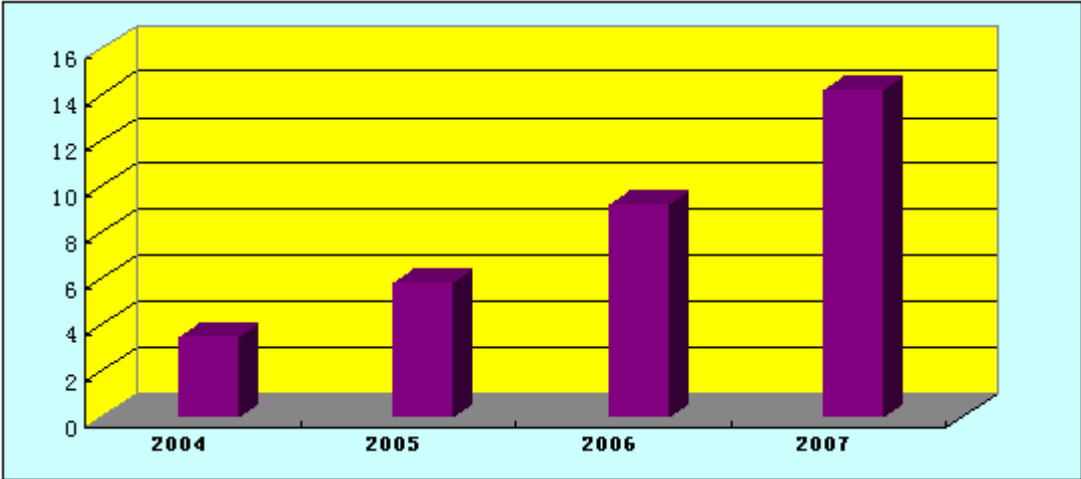
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Title	<b>China Low-E Glass Market Report, 2007-2008</b>	Pages	41										
Price	PDF USD \$ 1,500    Hard Copy USD \$ 1,400	Release Date	Mar/2008										
Abstract	<p>China is a big consumer of energy. Its building energy consumption reaches 500 million tons of standard coal annually, accounting for 27% of the total. In China, one ton of standard coal is equal to 0.77 ton of crude oil and 752 cubic meters of natural gas. At present, China has an average annual growth rate of more than 5.84% in building energy consumption, of which around half is consumed by building doors and windows. Since China has not paid much attention to energy conservation of doors and windows for a long time, over 93% of existing 44 billion square meters of construction are not installed by energy-saving window frames and glass. And the majority of around two billion square meters of the newly added construction each year are not energy-saving buildings. Furthermore, several billion square meters of public construction and tens of millions of square meters of glass curtain walls mostly use non-energy-saving monolithic glass or common hollow glass. Starting from April 1<sup>st</sup> 2008, China's newly amended Energy Saving Law will be fully implemented, which has made the conservation of resources as the basic national policy, indicating that China's energy-efficient glass market will have a broad space for the development.</p> <p>Low-E glass, as the best energy-saving glass, has extremely good energy-saving effect, good optical performance and environmental characteristics in comparison with common glass and conventional coated glass used in construction. Whereas, China's output of Low-E glass only hit 5.9 million square meters in 2005, and the figure rose to 9.2 million square meters in 2006 which was less than one sixths of the U.S. output in 2004. In this sense, China lags far behind the developed countries in the promotion and the application of energy-saving glass.</p> <p style="text-align: center;"><b>China's Output of Low-E Glass, 2004-2007 (unit: million m2)</b></p>  <table border="1" style="margin-left: auto; margin-right: auto;"> <caption>China's Output of Low-E Glass, 2004-2007 (unit: million m2)</caption> <thead> <tr> <th>Year</th> <th>Output (million m2)</th> </tr> </thead> <tbody> <tr> <td>2004</td> <td>4.5</td> </tr> <tr> <td>2005</td> <td>5.9</td> </tr> <tr> <td>2006</td> <td>9.2</td> </tr> <tr> <td>2007</td> <td>14.5</td> </tr> </tbody> </table> <p style="text-align: center;">Source: ResearchInChina</p>			Year	Output (million m2)	2004	4.5	2005	5.9	2006	9.2	2007	14.5
Year	Output (million m2)												
2004	4.5												
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	<p>China's annual output of Low-E glass has increased gradually in recent years. China's Low-E glass production lines are mainly concentrated in such manufacturers as CSG Holding Co., Ltd., China Yaohua Glass Group Corporation, Shanghai Yaohua Pilkington Glass Co., Ltd., Weihai Blue Star Glass Holding Co., Ltd., and Fuyao Group Glass Industries Co., Ltd. During the period of 2007 to 2008, more and more glass producers have introduced and will introduce Low-E glass production lines. It is expected that China's demand for Low-E glass by 2010 will amount to 97 million square meters, and meanwhile, China's output of Low-E glass will reach 50 million square meters at the end of 2010 based on the current growth rate of capacity expansion. In contrast to the huge domestic demand, there is a huge gap in the production capacity of Low-E glass in China.</p> <p>The data in the report is sourced from the National Bureau of Statistics of China, the Ministry of Housing and Urban-Rural Construction of the People's Republic of China and the China Architectural and Industrial Glass Association, and the data of some key enterprises are from their financial statements.</p>
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