

NEWS RELEASE



For Immediate Release

Contact:

Corinne Gangloff
Media Relations
phone: +1 440.684.9600
fax: +1 440.646.0484
pr@freedoniagroup.com

US DEMAND FOR ADVANCED FLAT GLASS TO APPROACH \$7.2 BILLION IN 2012

Demand for advanced flat glass is projected to increase 5.0 percent annually to \$7.2 billion in 2012. Gains will derive from a variety of factors, including the recovery of residential building construction activity from a weak 2007 base, ongoing rapid growth in a variety of emerging technologies (such as smart glass and self-cleaning glass) and strong gains in laminated glass used as hurricane glass, ballistic glass and burglary resistant glass. Solid advances for certain niche products in the large motor vehicle market will also contribute to growth. These and other trends are presented in ***Advanced Flat Glass***, a new study from **The Freedonia Group, Inc.**, a Cleveland-based industry market research firm.

Security and safety glass products, including both tempered and laminated flat glass, represent the largest group of advanced flat glass materials, accounting for 62 percent of total demand in 2007. While certain of these products are relatively mature (such as tempered safety glass for motor vehicles), there remain a number of opportunities for advanced flat glass, particularly for laminated flat glass used as hurricane glass, burglary glass, ballistic glass and motor vehicle safety glass.

Solar control flat glass, the second largest group of advanced flat glass products, will continue to post above average growth through 2012. In particular, demand for smart glass is expected to finally have a significant impact outside of the electrochromic mirrors and liquid crystal display privacy glass that have been available for some years. The much-awaited commercial roll-out of suspended particle device (SPD) smart glass technologies is now expected to occur, sparking well above average growth for the category through 2012. Other types of solar control glass, such as low-emissivity glass and reflective glass, will post slower but nonetheless strong growth.

The primary market for advanced flat glass remains motor vehicle production, which accounted for more than 50 percent of total demand in 2007. The market is dominated by laminated windshield glass and tempered glass for side and rear windows, but there are better growth opportunities in electrochromic mirrors, heads-up displays and laminated safety glass for side windows.

| US ADVANCED FLAT GLASS DEMAND (million dollars) | | | | | |
|--|-------------|-------------|-------------|-----------------|---------------|
| Item | 2002 | 2007 | 2012 | % Annual Growth | |
| | | | | 2002- 2007 | 2007- 2012 |
| Advanced Flat Glass Demand | <u>4787</u> | <u>5607</u> | <u>7150</u> | 3.2 | 5.0 |
| Safety & Security Glass | 3244 | 3496 | 4160 | 1.5 | 3.5 |
| Solar Control Glass | 1114 | 1529 | 2145 | 6.5 | 7.0 |
| Other Advanced Glass | 429 | 582 | 845 | 6.3 | 7.7 |

© 2008 by The Freedonia Group, Inc.

Advanced Flat Glass (published 06/2008, 255 pages) is available for \$4,500 from The Freedonia Group, Inc., 767 Beta Drive, Cleveland, OH 44143-2326. For further details, please contact Corinne Gangloff by phone 440.684.9600, fax 440.646.0484 or e-mail pr@freedoniagroup.com. Information may also be obtained through www.freedoniagroup.com.

###

A limited license to use or reprint information from this news release is granted to you provided attribution for the same – including, if possible, the price of the report – is given to The Freedonia Group, Inc. (Cleveland, OH). We would also appreciate the courtesy of receiving a copy of the article or publication in which we appear.