FACTSHEET GLASS INDUSTRY

Glass is used in everyday life. Its broad range of application reaches from research and science, modern architecture to industries such as construction, food, automotive, electronics and furniture industries.

The German glass manufacturers have to consider the following regulations:

- Energy and Climate
  The glass industry is one of the most energy intensive industries in Germany. As such, it is subject to energy and climate policy regulations. These affect the glass industry’s production operations and competitiveness.

- Environment
  Companies in the industries deal with environmental issues on a daily basis. On one hand, they have to obtain approval for their production plants and equipment, on the other, there are environmental issues associated with the production and use of their products.

- Product policy
  Companies in the glass industry manufacture a wide variety of different glass products. Container glass products are subject to strict environmental sustainability and recycling requirements.

- Technology
  Products packaged in glass are very popular to consumers. The glass industry is responsible for supplying high quality glass containers of all kinds of shapes and sizes for customers to fill with their products.

Range of activities

The product range of the German glass industry has grown widely. Various industries deal with glass in a variety of applications: flat glass production and processing, container glass, economic glass, mineral fiber industry for insulation and other manufacturers for special and technical glass.

Shares in Sales Volume (as of Dec. 2015):

- Flat glass (production & processing)
- Container glass
- Economic glass
- Fiber glass
- Special & technical glass
FACTSHEET GLASS INDUSTRY

German Glass Industry Customers:

Due to a high international competition in the field of standard glassware, German glass manufacturers find themselves open to untapped markets. An increase in production for markets such as the renewable energies was witnessed greatly. Manufacturing solar panels and/or parabolic reflectors pushed the sector of special and technical glass to grow.

Business activities

The glass industry closed out 2015 with a slight growth in revenue of 1.1% in comparison to the previous year, with total revenue amounting to EUR 9.19bn. This result is first and foremost attributed to the increase in foreign sales, which amounted to EUR 3.6bn in 2015. This corresponds to a growth of 6.1% over 2014.

Local sales declined slightly, however, falling by 1.9% to reach an amount of EUR 5.58bn in comparison to last year’s figures of EUR 5.69bn. The number of employees in the glass industry remained constant at approximately 53,000 in 2015.

Exports

The German glass industry’s export surplus dropped by 1.8% to reach EUR 1.02bn. 61.1% of Germany’s glass exports in 2015 was directed to EU countries (2014: 62.9%), followed by Asia at 12.6% (2014: 12.0%) and America at 11.2% (2014: 10.5%).

The export value of glassware in 2015 compared with the preceding year rose by 6.6% to EUR 6.11bn (2014: EUR 5.73bn), whereby the contribution to exports from glass trading companies increased from 40.7% in the previous year to 41.0% in 2015.

The export value for retail companies in 2015 was EUR 2.51bn (2014: EUR 2.33bn). The leading export countries of the total export value were France (10.9 %), the USA (9.1 %), Austria (6.5 %), the Netherlands (6.4 %), China (5.6 %), and Switzerland (5.6 %).

The total export quota increased from 50.2% in 2014 to 52.2% in 2015.

Imports

Imports rose in 2015 by 8.5% to EUR 5.09 bn (2014: EUR 4.69bn). The total import quota increased from 45.2% in 2014 to 47.7% in 2015.

For the eighth year in succession big portion of Germany’s imports come from China, with a 16.3% share of imports (2014: 11.1 %), a massive increase. This figure is almost twice that of second-placed Poland with 8.5%, followed by the United States...
Business opportunities

Egyptian companies have good opportunities to become players in the German glass market.

The main reason for it is their location advantages where they possess huge amounts of sand, raw material for glass and the ability to feed the energy demand of such a consumptive industry with gas reserves and a high potential for producing renewables.

German glass machinery producers have proved as reliable partners in the Arab world in supplying high-quality facilities for manufacturers.

Trading activity with Egypt in Glass & Glassware

Information has been researched and compiled thoroughly. The publisher (and the writers) does not accept liability for accuracy and completeness of the content, as well as interim changes.

Status: March 2017
<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>2014, in 1,000 EUR</th>
<th>2015, in 1,000 EUR</th>
<th>Change in %</th>
</tr>
</thead>
</table>
| **Umsatz Glasindustrie gesamt**
| Gesamt Total    | 9,083,557         | 9,185,605         | 1,1         |
| Inland Domestic | 5,687,866         | 5,582,410         | -1,9        |
| Ausland Foreign | 3,395,691         | 3,603,195         | 6,1         |
| **Umsatz Flachglasherstellung**
| Gesamt Total    | 1,028,045         | 1,011,334         | -1,6        |
| Inland Domestic | 562,607           | 541,209           | -3,8        |
| Ausland Foreign | 465,438           | 470,125           | 1,0         |
| **Umsatz Flachglasveredelung**
| Gesamt Total    | 3,461,115         | 3,558,976         | 2,8         |
| Inland Domestic | 2,412,588         | 2,399,725         | -0,5        |
| Ausland Foreign | 1,048,527         | 1,159,251         | 10,6        |
| **Umsatz Behälterglas**
| Gesamt Total    | 1,885,682         | 1,896,822         | 0,6         |
| Inland Domestic | 1,194,045         | 1,183,375         | -0,9        |
| Ausland Foreign | 691,637           | 713,448           | 3,2         |
| **Umsatz Wirtschaftsglas**
| Gesamt Total    | 487,296           | 481,845           | -1,1        |
| **Umsatz Glasfasern**
| Gesamt Total    | 909,952           | 884,039           | -2,8        |
| Inland Domestic | 569,711           | 538,543           | -5,5        |
| Ausland Foreign | 340,241           | 345,496           | 1,5         |
| **Umsatz Spezialglas und technisches Glas**
| Gesamt Total    | 1,311,468         | 1,352,589         | 3,1         |
| Inland Domestic | 473,555           | 468,747           | -1,0        |
| Ausland Foreign | 837,913           | 883,842           | 5,5         |

![Image of table content]

Sources: Statistisches Bundesamt, eigene Erhebungen.

**Notes:**
- r = revised
- v = preliminary
- Abweichungen sind aufgrund von Rundungsunterschieden möglich.
- Discrepancies possible due to rounding.
FACTSHEET GLASS INDUSTRY

Main players in the market - Location Overview
### FACTSHEET GLASS INDUSTRY

#### Container Glass Industry

- Ardaig Glass GmbH
- Bayerische Flaschen-Glashüttenwerke
- Wiegand & Söhne GmbH & Co. KG
- Gerresheimer AG, Düsseldorf
- Gerresheimer Essen GmbH
- Gerresheimer Lohr GmbH
- Gerresheimer Tettau GmbH
- Glaswerk Ernstthal GmbH
- Heinz-Glas GmbH
- BA Glass Germany GmbH
- Noelle + von Campe Glashütte GmbH
- O-I Sales & Distribution Germany GmbH
- Glashütte Freital GmbH
- SGD Kipfenberg GmbH
- Verallia Deutschland AG
- WECK® Glaswerk GmbH

#### Flat Glass Manufacturers

1. Bauglasindustrie GmbH
2. Glashütte Lamberts Waldsassen GmbH
3. Pilkington Deutschland AG
4. Saint-Gobain Glass Deutschland GmbH
5. Flachglas Torgau GmbH

#### Utility Glass & Special Glass Industry

1. Auer Lighting GmbH
2. Dennert Poraver GmbH
3. Farbglashütte Reichenbach GmbH
4. Glashütte Limburg Leuchten GmbH & Co. KG
5. Liaver GmbH & Co. KG
6. OSRAM GmbH
7. OWA – Odenwald Faserplattenwerk GmbH
8. PQ Potters Europe GmbH
9. Ritzenhoff AG
10. SCHOTT AG
11. SCHOTT Technical Glass Solutions GmbH
12. Wöllner GmbH