

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**

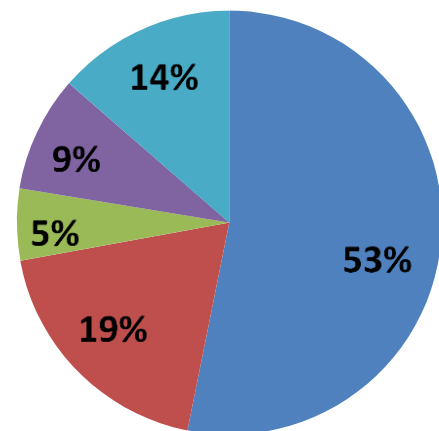
Products packaged in glass are very popular to consumers. The glass industry is responsible for supplying high quality glass containers of all kinds of shapes and sizes for customers to fill with their products.

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):

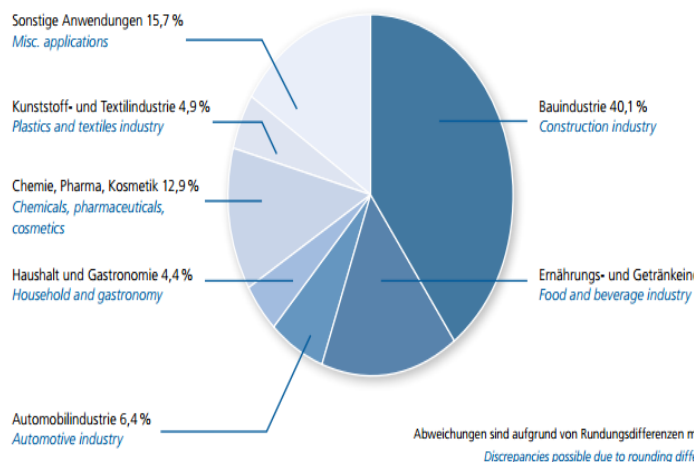
- ▣ Flat glass (production & processing)
- ▣ Container glass
- ▣ Economic glass
- ▣ Fiber glass
- ▣ Special & technical glass





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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



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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.

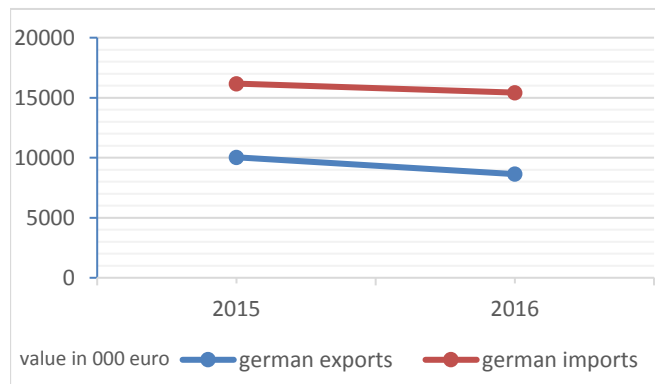
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**Deutsch-Arabisches
Industrie- und Handelskammer**
German-Arab
Chamber of Industry and Commerce
الغرفة الألمانية العربية للصناعة والتجارة

Trading activity with Egypt in Glass & Glassware





Main Figures - Sections Overview

BRANCHENSEKTOR INDUSTRY SECTOR		2014 _r , IN 1.000 EUR	2015 _{r,p} , IN 1.000 EUR	VERÄND. IN % CHANGE IN %
Umsatz Glasindustrie gesamt Glass industry revenue, total	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 Flat glass revenue, manufacture	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 Flat glass revenue, finishing	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 Container glass revenue	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 Tableware glass revenue	Gesamt Total	487.296	481.845	-1,1
Umsatz Glasfasern Glass fibres revenue	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 Special glass and technical glass revenue	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

r = revidiert v = vorläufig

Abweichungen sind aufgrund von Rundungsdifferenzen möglich.

r = revised p = provisional

Discrepancies possible due to rounding

Quellen: Statistisches Bundesamt, eigene Erhebungen.

Sources: German Federal Statistics Office, own surveys



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Main players in the market - Location Overview





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Behälterglasindustrie *Container Glass Industry*

- 1 Ardagh Glass GmbH
- 2 Bayerische Flaschen-Glashüttenwerke Wiegand & Söhne GmbH & Co. KG
- 3 Gerresheimer AG, Düsseldorf
- 4 Gerresheimer Essen GmbH
- 5 Gerresheimer Lohr GmbH
- 6 Gerresheimer Tettau GmbH
- 7 Glaswerk Ernstthal GmbH
- 8 Heinz-Glas GmbH
- 9 BA Glass Germany GmbH
- 10 Noelle + von Campe Glashütte GmbH
- 11 O-I Sales & Distribution Germany GmbH
- 12 Glashütte Freital GmbH
- 13 SGD Kipfenberg GmbH
- 14 Verallia Deutschland AG
- 15 WECK® Glaswerk GmbH

Flachglasindustrie *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

Gebrauchs- und Spezialglasindustrie *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