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TSR - Press Release

Worldwide Automotive Glazing Market Research

- Request New Functions for Advanced Windshield Addition to In-Vehicle Comfort -

Techno Systems Research Co., Ltd. (TSR) published 『Potential Study for Advanced Windshield Market 2013-2014』. This research clarified the function trend for automotive glazing/windshield market. In this report, market potential of new functions for advanced windshield were calculated in addition to the trend of automotive glazing/windshield. The existing functions for the automotive glazing/windshield are categorized by purpose. First, as “Thermal Reduction” UV Cut, Solar Control, Absorbing and IR Reflective are included in this category. Second, for “Comfort” is acoustic laminated glass. Third, for “Infotainment” is wedge interlayer for Head-up display. And finally, for “Other Functions”, there are heating glass for antifogging. Additionally, there are thin glass and glazing display are for the tomorrow’s windshield.

[Functions Map for Automotive Glazing/Windshield]

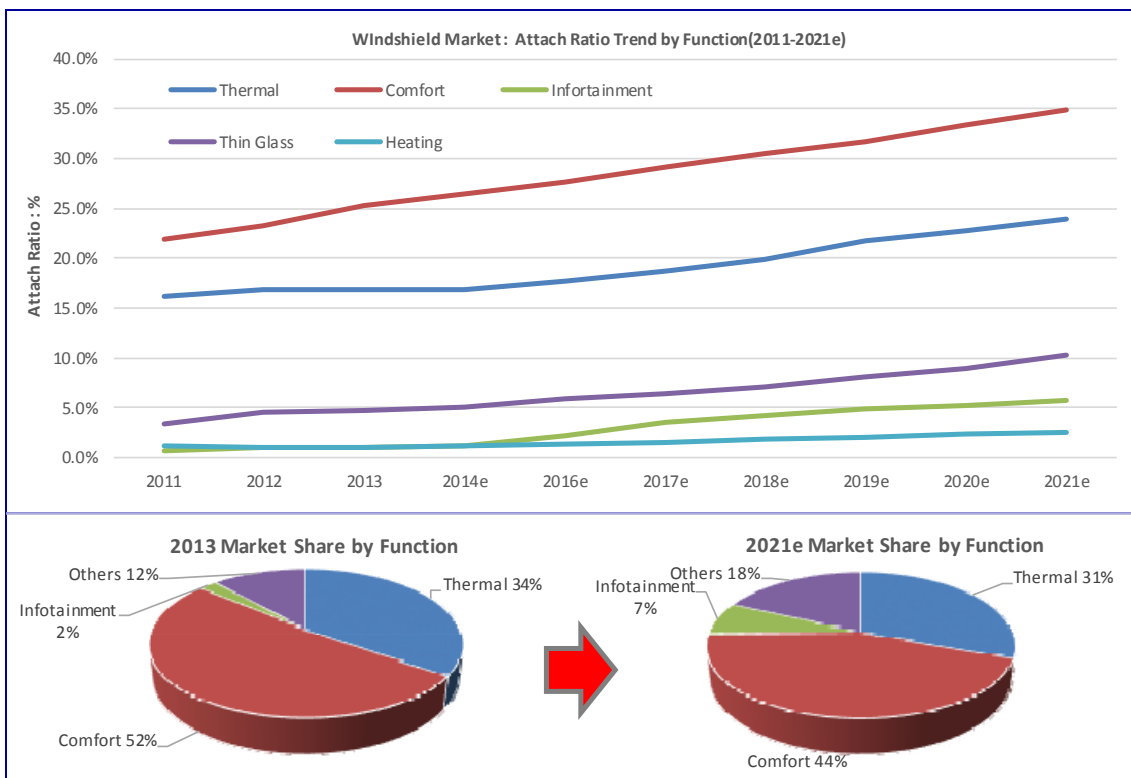
Category of Advanced Windshield Function						
Category	Function	Definition				Remark
		Glass Material	Interlayer	Film	Coating	
Thermal	Solar Control	○	-	-	-	Tinted, Green, Gradation Glass
	Absorbing	-	○	-	-	
	Reflective	-	-	○	○	
	Intercept	-	-	○	○	
Comfort	UV Cut	-	○	○	-	Standard Function for Windshield
	Acoustic	-	○	-	-	
Infotainment	Head Up Display	-	○	○	-	
	Glazing Display	○	-	○	-	Transparent Displays
Other Functions	Water Repellent	○	-	-	○	DOP Market
	Heating	-	-	-	○	Wired, Metal Coating
	Weight Saving (Thin Glass)	○	-	-	-	Under 4 mm
	Light Tuning	-	○	○	-	

[Requirement Functions for the Next Automotive Glazing/Windshield]

UV Cut and acoustic functions has been already high demand in existing vehicles for the purpose of upgrading in-vehicle comfort. UV Cut is now a standard function of laminated glass, and acoustic function is installed on every forth vehicle.

TSR estimates that the demand for these functions will continue to grow in automotive glazing/windshield market. In the future, the required functions for tomorrow’s windshield will be thermal reduction and infotainment. In 2013, the attach ratio all of thermal reduction was about 17.0%, and the market share of that by function, was 34.5%. On the other hand, the attach ratio of infotainment function such as Head-up display was about 1%, and the market share by function about 2.2% in 2013. These two functions will expand the demand, and the attach ratio of thermal reduction and infotainment is expected to grow about 25.4% and 5.9% respectively in 2021 due to the tightening of regulations for fuel emission and the growing demand for driver communication system by ADAS.

[Automotive Glazing/Windshield Market : Attach Ratio by Function and the Share of Demand]



※ Please contact us for more details.

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