

The EU glass industry: 2015-2016

Glass Alliance Europe has compiled its annual statistics for glass production within the 28 EU member countries (which for this year includes Britain).

In 2015, glass production throughout the EU-28 countries reached a volume of more than 35 million tonnes. This was a global increase of 3.8% compared with 2014, confirming an improved trend since the crisis in 2009.

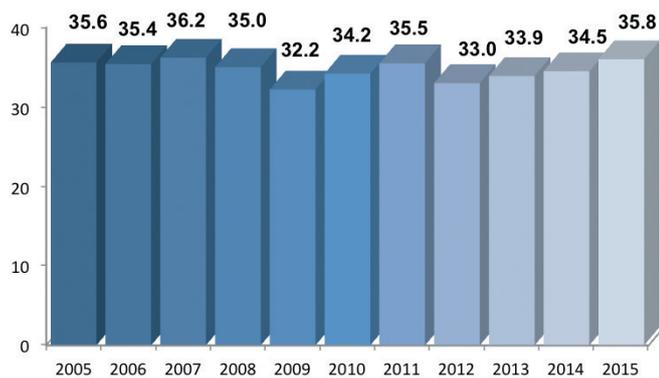
This production level maintains the EU as the largest glass producer in the world with a market share of around one-third of the total world market. Germany remains the EU's biggest producer with about one fifth of the volume, closely followed by France, Spain, Italy and the UK.

For the first time in many years, all glass sectors succeeded in increasing their production, thanks to a revived economy predominantly in the construction sector, car industry, engineering and food services.

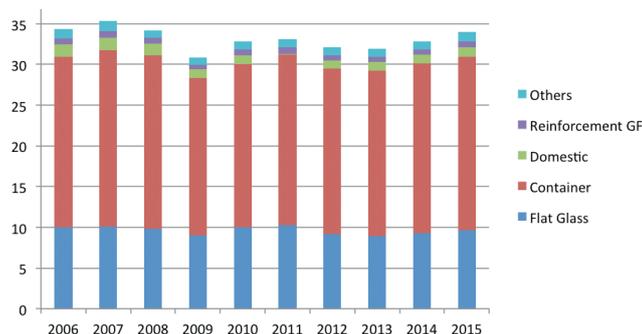
External Trade

Regarding foreign trade, imports from Asian countries, and in particular China, remain big competitors.

In 2015, extra EU-28 exports decreased by 5.9% in volume and stabilised at -0.4% in value compared to 2014. Exports vary



▲ Fig. 1: EU Glass Production (million tonnes)



▲ Fig. 2: Production Evolution within Sectors (in thousand tonnes)

from subsector to subsector and are of greatest importance to the special glass and tableware sectors.

The EU-28's biggest clients in volume are the rest of Europe (50%) including Switzerland (15%), Turkey (8%) and Russia (4.5%), followed by the USA (12.2%) and Far East Asia (9.3%) including China (3%).

As for extra-EU imports in EU-28, in 2015 they increased in volume by 4.35% and in value by nearly 14% compared with 2014. Far-East Asia accounted for 48% - including 39% from China alone, and the rest of Europe (38%) - including Turkey (9.7%) and Switzerland (10%) - and finally the USA (4.5%).

Employment 2015

The number of employees has stabilised since 2013. Currently, the EU-28 glass industry employs about 185,000 people (including processors), which means an increase of 1.9% compared with 2014, showing a slightly better socio-economic situation.

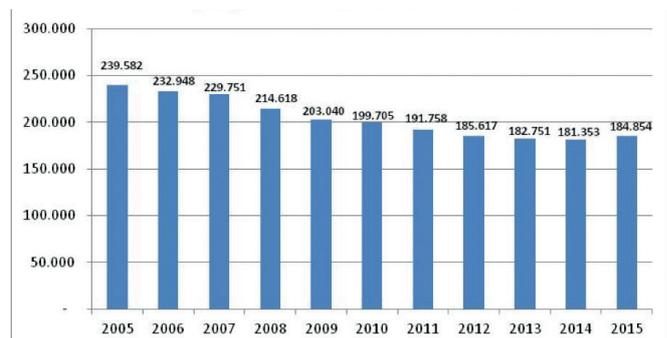
Outlook

These 2015 figures are based on the entire glass industry, and it is important to realize that the situation is not the same for every sector. Evolution in production and employment, as well as in the origin of imports into the EU, are very different between glass sectors.

Generally speaking, however, it can be said that after the strong recession in 2012, glass sectors have stabilised since 2013 thanks to slightly better market conditions and consumer confidence, particularly noticeable during the second semester 2014 and in 2015.

It is hard to make projections for 2016, but one can pre-empt a continued improvement of market conditions with, in parallel, an ever-challenging manufacturing climate.

Investment outside the European borders has materialised, and will probably lead to higher imports as demand takes up. ■



▲ Fig. 3: Employment evolution in EU-28