

Global Laminated Glass Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 24.6 bn
Forecast (2031)	USD 35.9 bn
CAGR (2021-2031)	6.5%
Study period	2021-2031
Largest region	Asia-Pacific · 43.8%
Fastest-growing region	Middle East and Africa · 7.6%
Market concentration	Moderate
Licence	Individual / Company

The global laminated glass market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Building and construction accounts for XX% of demand as safety codes, façade specifications, acoustic requirements and climate-resilient glazing increase the laminated content of windows, curtain walls, balustrades and overhead assemblies. Automotive demand is shifting toward larger windshields, panoramic roofs, head-up displays and sensor-compatible glazing, raising value per vehicle even where vehicle production grows slowly. Asia-Pacific leads with XX% of market value, while the Middle East and Africa records the fastest regional growth at XX%.

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Executive summary

The global laminated glass market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Building and construction accounts for XX% of demand as safety codes, façade specifications, acoustic requirements and climate-resilient glazing increase the laminated content of windows, curtain walls, balustrades and overhead assemblies. Automotive demand is shifting toward larger windshields, panoramic roofs, head-up displays and sensor-compatible glazing, raising value per vehicle even where vehicle production grows slowly. Asia-Pacific leads with XX% of market value, while the Middle East and Africa records the fastest regional growth at XX%.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global laminated glass market value reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- Market volume totaled XXX square meters in 2025 and will reach XXX square meters by 2031.
- Building and construction generated XX% of 2025 market value, supported by façades, balustrades, skylights, floors and storm-resistant openings.
- PVB interlayers held XX% of 2025 value, while ionoplast interlayers will post the fastest interlayer growth at XX% CAGR.
- Asia-Pacific represented XX% of global value in 2025; China alone accounted for XX%.
- The Middle East and Africa will grow at XX% CAGR through 2031 as Gulf megaprojects and urban construction deepen demand for high-specification façades.
- OICA recorded worldwide motor-vehicle production of XXX units in 2024, sustaining a large recurring demand base for laminated windscreens.
- Buildings consume XX% of global energy and contribute XX% of global carbon dioxide emissions, intensifying demand for multifunctional safety glazing that combines solar control and thermal performance.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Laminated Glass Market Trends and Growth Drivers

Laminated glass sits at the intersection of non-discretionary safety regulation and premium performance engineering. The same bonded construction that retains fragments after breakage can carry acoustic, solar-control, decorative, structural and electronic functionality, allowing suppliers to increase value without relying solely on square-meter growth.

The demand cycle differs sharply by application. Automotive programs deliver long production runs and strict qualification barriers, while architectural orders are project-based, locally fabricated and sensitive to construction finance; suppliers serving both markets can balance cycles but must maintain distinct bending, optical-quality and logistics capabilities.

Decarbonization is reshaping both the product and the production base. Customers increasingly require environmental declarations and lower embodied carbon, while producers invest in cullet recovery, furnace electrification and lighter constructions that preserve safety performance.

Growth drivers

Safety codes expand mandatory laminated-glass use

Vehicle glazing rules and building codes convert safety performance from a design preference into a specification requirement. Windscreens, overhead glazing, balustrades and impact-rated openings generate recurring demand because the interlayer retains fragments and supports post-breakage integrity.

High-rise façades increase glass area per building

Urban commercial towers, premium residential projects and transport hubs are using larger transparent envelopes and wider unsupported spans. This increases both laminated area and average selling price through thicker plies, structural interlayers, coatings and complex fabrication.

Automotive glazing becomes a functional interface

Panoramic roofs, head-up displays, antennas, cameras and thermal-management features are raising the technical content of vehicle glass. Suppliers able to control optical distortion, wedge geometry, coatings and sensor zones capture substantially more value per vehicle.

Urban noise drives acoustic-laminate adoption

Developers and automakers are specifying acoustic PVB to reduce traffic, rail and wind noise without materially increasing assembly thickness. Adoption is broadening from luxury vehicles and premium towers into mass-market vehicles, hotels, hospitals and multifamily housing.

Extreme weather strengthens impact-glazing demand

Hurricane zones and storm-exposed coastal cities require building envelopes that resist debris impact and remain closed after breakage. Laminated systems gain share in windows, curtain walls and storefronts as insurers, owners and authorities place greater value on continuity and water exclusion.

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Energy codes favor multifunctional safety glass

Laminated construction increasingly sits inside coated insulating units that deliver safety, solar control and thermal performance together. Tightening energy requirements raise demand for low-emissivity, infrared-absorbing and spectrally selective combinations rather than basic clear laminates.

Restraints

High energy and processing costs pressure margins

Float furnaces, bending, clean-room assembly and autoclave cycles require substantial energy and capital. Volatile natural-gas and electricity prices compress processor margins where project contracts or automotive supply agreements delay price recovery.

Composite construction complicates recycling

The permanent bond between glass and polymer makes high-purity material separation more difficult than recycling monolithic cullet. Limited collection networks and contamination constraints keep many damaged windscreens and façade laminates outside closed-loop glass production.

Fabrication defects create costly rejection risk

Moisture ingress, bubbles, haze, edge instability and optical distortion can invalidate high-value panels after lamination. Oversized, bent and coated products magnify scrap costs and require disciplined storage, clean-room control and process certification.

Construction cycles delay architectural volumes

Commercial glazing demand follows project financing, permitting and contractor backlogs, exposing fabricators to sharp order timing changes. Weak office development and expensive credit weigh on mature markets even as infrastructure and residential work offset part of the decline.

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Laminated Glass Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Safety codes expand mandatory laminated-glass use	XXX	XXX	XXX
High-rise façades increase glass area per building	XXX	XXX	XXX
Automotive glazing becomes a functional interface	XXX	XXX	XXX
Urban noise drives acoustic-laminate adoption	XXX	XXX	XXX
Extreme weather strengthens impact-glazing demand	XXX	XXX	XXX
Energy codes favor multifunctional safety glass	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
High energy and processing costs pressure margins	XXX	XXX	XXX
Composite construction complicates recycling	XXX	XXX	XXX
Fabrication defects create costly rejection risk	XXX	XXX	XXX
Construction cycles delay architectural volumes	XXX	XXX	XXX

Source: XXX

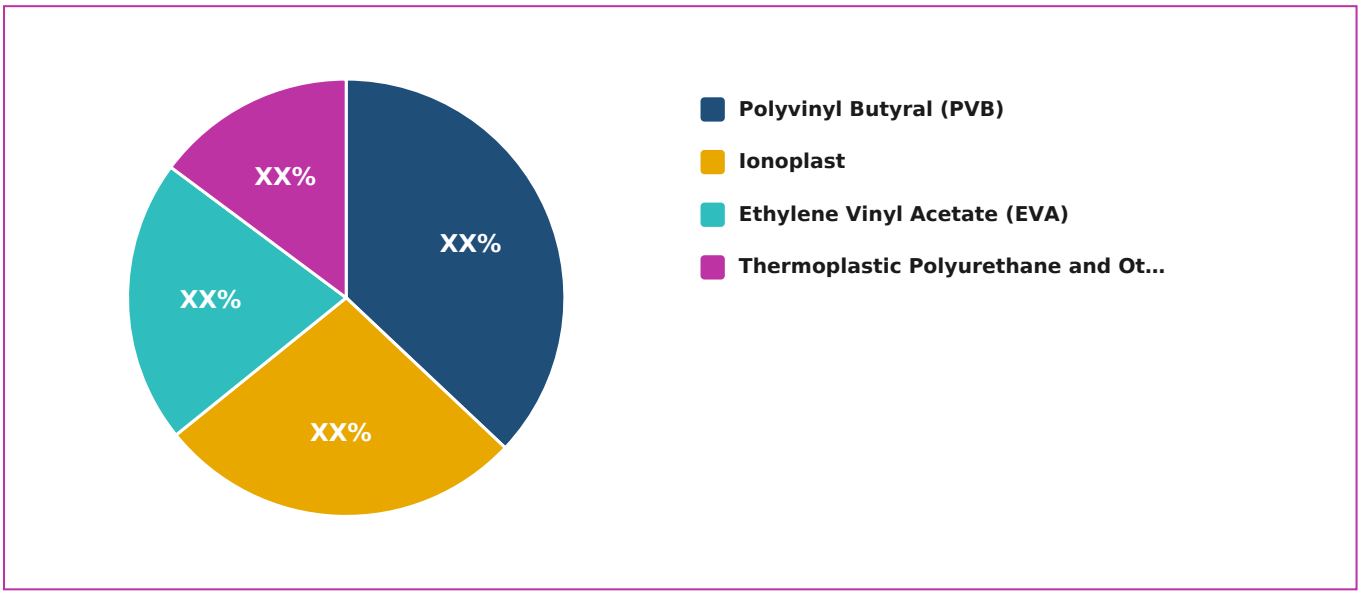
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Laminated Glass Market Segmentation Analysis

By Interlayer Type

PVB remains the volume standard because it combines established processing, optical clarity, fragment retention and broad automotive and architectural qualification. Ionoplast gains in structural façades, balustrades and exposed-edge applications requiring stiffness and post-breakage strength, while EVA expands in decorative and photovoltaic constructions.

Value share by interlayer Type, 2025



Source: XXX

Value by interlayer Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Polyvinyl Butyral (PVB)	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ionoplast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ethylene Vinyl Acetate (EVA)	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Thermoplastic Polyurethane and Other Interlayers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

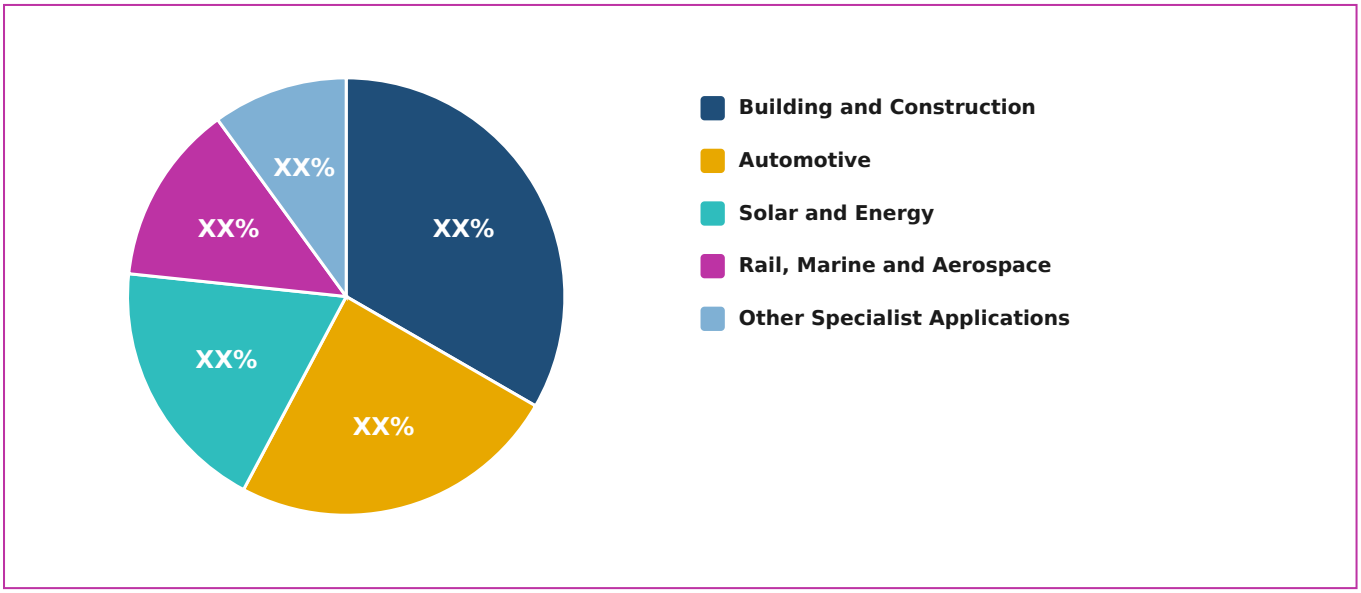
By Application

Building demand leads through façades, windows, canopies, balustrades and overhead glazing, with specification shifting toward impact, acoustic and structural performance. Automotive remains the second-largest application and achieves strong value growth as panoramic roofs, display projection and thermal-

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management features increase laminated area and complexity per vehicle.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Building and Construction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Automotive	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Solar and Energy	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rail, Marine and Aerospace	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Specialist Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Performance Function

Basic fragment-retention and intrusion-delay performance remains the market's largest functional pool. Acoustic products are scaling rapidly in urban buildings and vehicles, while solar-control, infrared-management, switchable and display-compatible laminates achieve the highest price realization and fastest specification growth.

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Value by performance Function, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Safety and Security	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Acoustic Control	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Solar, UV and Smart Control	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Decorative and Privacy	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fire, Blast and Ballistic Resistance	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Route

Direct contracting dominates automotive programs, major façade packages and engineered-security installations because qualification, warranty and technical support are central to procurement. Fabricator and distributor channels remain essential for replacement glazing, regional projects and standardized cut-to-size architectural products.

Value by sales Route, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct OEM and Project Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fabricators and Specialist Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Replacement and Retail Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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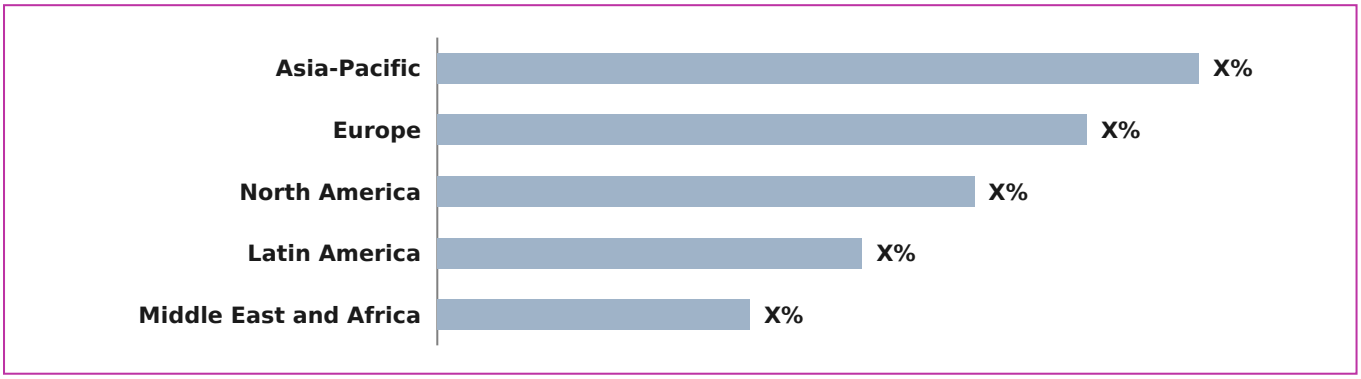
Laminated Glass Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of 2025 market value, anchored by China's vehicle output, dense façade-fabrication ecosystem and continuing commercial and transport construction. Japan and South Korea generate a higher-value mix through advanced automotive glazing, while India and Southeast Asia supply the strongest volume expansion through urban housing, metros, airports and domestic vehicle production.

Europe remains a technology-intensive market for acoustic windscreens, structural façades and low-carbon building products. Near-term construction softness constrains basic architectural volume, but renovation, safety compliance and high-performance insulating units sustain laminated content; regional furnace rationalization also increases the importance of capacity discipline and contract pricing.

North America benefits from hurricane-resistant construction, safety retrofits and premium vehicle glazing, while the Middle East and Africa grows fastest at XX% CAGR on Gulf megaprojects, tourism assets and transport infrastructure. Latin American demand is led by Brazil and Mexico, with Mexico benefiting from automotive export production and Brazil providing the region's largest construction-led opportunity.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Laminated Glass Market Competitive Landscape and Company Share

The market is moderately concentrated at primary glass and automotive-system level but fragmented among downstream laminators and façade fabricators. AGC, Saint-Gobain, NSG Group, Fuyao Glass Industry and Guardian Glass combine float capacity, coating assets, bending technology, homologation capability and global customer relationships that are difficult for local processors to replicate.

Competition is moving beyond clear safety glass toward acoustic interlayers, structural laminates, head-up-display windshields, panoramic roofs, embedded antennas and lower-carbon products. Interlayer suppliers such as Eastman, Kuraray and Sekisui Chemical exert significant influence over performance development, qualification cycles and the value captured in premium laminate constructions.

Recent investment emphasizes regional processing, lower-emission furnaces and specialized fabrication rather than indiscriminate commodity capacity. Acquisitions and brownfield projects are adding hurricane glazing, jumbo panels, solar glass and complex automotive capabilities, while European producers continue to rationalize high-cost upstream assets.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
AGC Inc.	XXX	XXX	XXX	XXX
Saint-Gobain	XXX	XXX	XXX	XXX
NSG Group	XXX	XXX	XXX	XXX
Fuyao Glass Industry Group	XXX	XXX	XXX	XXX
Guardian Glass	XXX	XXX	XXX	XXX
Şişecam	XXX	XXX	XXX	XXX
Xinyi Glass Holdings	XXX	XXX	XXX	XXX
CSG Holding	XXX	XXX	XXX	XXX
Vitro Architectural Glass	XXX	XXX	XXX	XXX
Central Glass	XXX	XXX	XXX	XXX

Source: XXX

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Laminated Glass Market Forecast and Strategic Opportunities

Market value will reach USD XXX billion by 2031 as laminated glass gains specification share and its performance content rises. Structural ionoplast, acoustic PVB, solar-control interlayers and electronically functional automotive constructions will outgrow standard clear safety laminates.

The central forecast assumes steady global construction recovery, moderate vehicle-production growth and continued tightening of safety and energy requirements. Faster adoption of panoramic roofs and climate-resilient façades would lift premium demand, while prolonged commercial-property weakness and sustained energy-price pressure would primarily affect commodity architectural laminates.

Winning suppliers will combine reliable local fabrication with optical quality, engineering support and documented environmental performance. Closed-loop cullet systems, low-carbon float substrates, digital quality control and early collaboration with automakers, architects and façade consultants will determine access to the highest-margin programs.

Opportunities

- Low-carbon laminated façade products with verified environmental declarations
- Ionoplast structural glazing for oversized and minimally supported façades
- Acoustic laminates for rail corridors, airports and urban residential projects
- Head-up-display, augmented-reality and switchable automotive glazing
- Hurricane, blast and forced-entry-resistant retrofits
- Closed-loop recovery of end-of-life windshields and architectural laminates

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