



The European Composites Market

- Market Overview, Trends & Cooperation Possibilities -

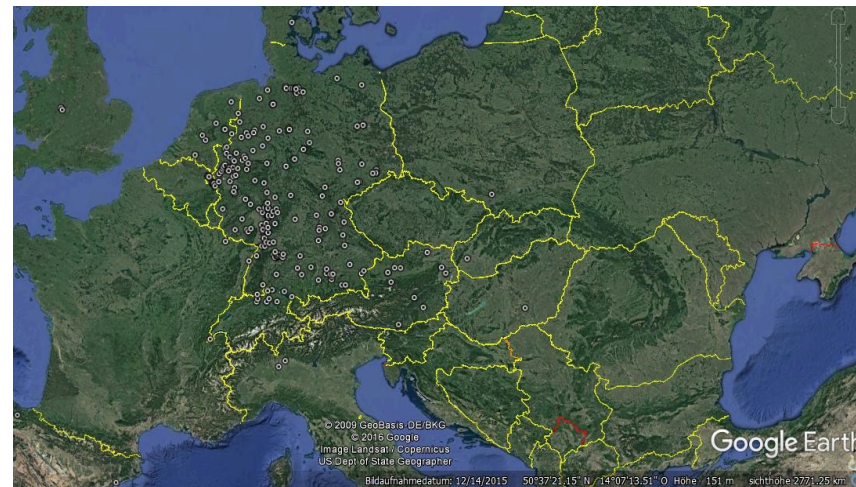
Februar 6th 2024 – BUTEXCOMP

About AVK

- Our Federation at a glance -

Our Organisation

- **Founded in 1924**
- **Members across the entire value chain of reinforced plastics**
- **> 230 (inter)national member companies (1/4 non German)**
- **> 1700 personal contacts inside the companies**
- ***„Full service provider for our members“***



AVK – The Network

- **Main Pillars of our work:**
 - **Expert Task Forces & Projects**
 - **Seminars, Conferences (ICC, ...)**
 - **Market Research & Individual Services**
 - **Press Services & Publications**
- **Our Network:**

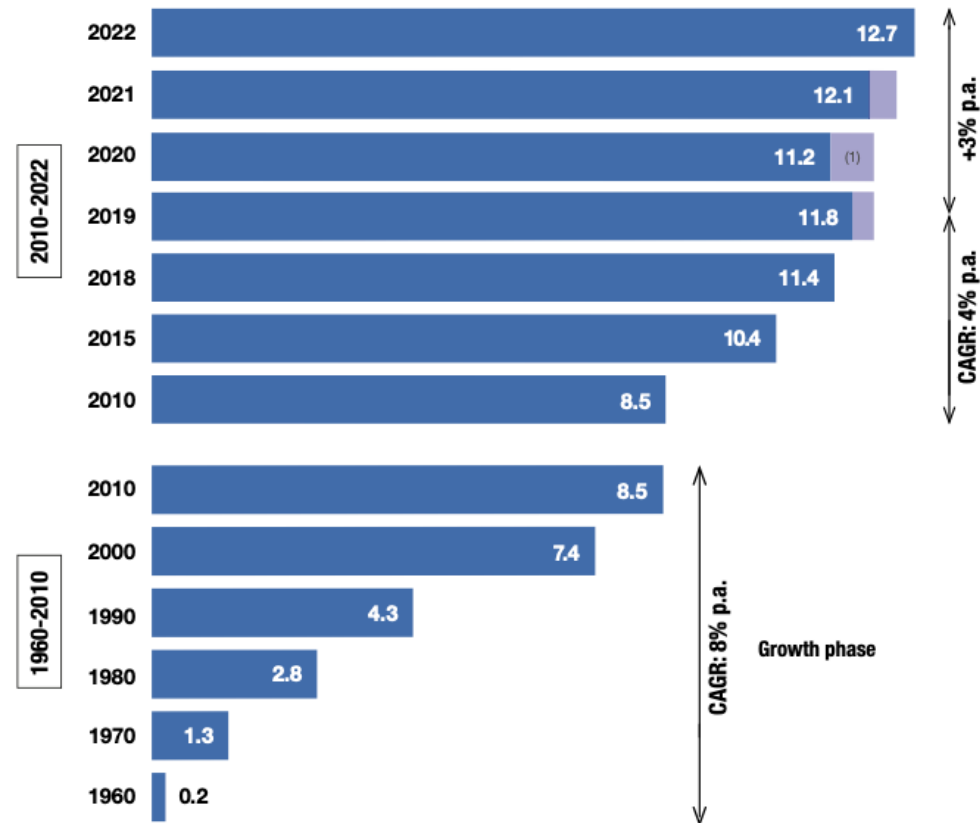


The Composites Market

- Market Development -

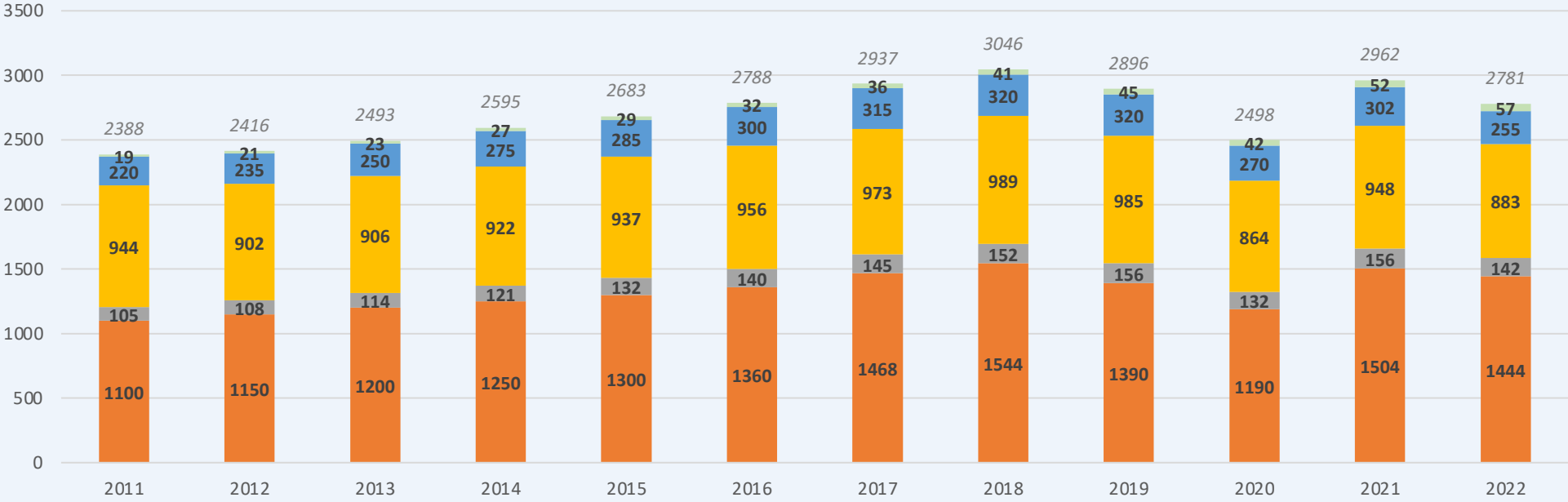
The Worldwide Composites Market (2022)

Evolution of the composite materials market - 1960-2022 - Global - In volume



Quelle: https://www.jeccomposites.com/wp-content/uploads/2023/04/V2_14985_DP-ALL_JEC-Observer_V2.pdf

The European Composites* Market (2022)



- Short Fibre Reinforced Thermoplastics
- Long-/Endless Fibre Reinforced Thermoplastics (LFT/GMT/CFRTP)
- Long-/Endless Fibre Reinforced Thermosets
- Non-Crimp-Fabrics
- Carbon Fibre Reinforced Plastics

* Not included:
Natural Fibre Reinforced Plastics

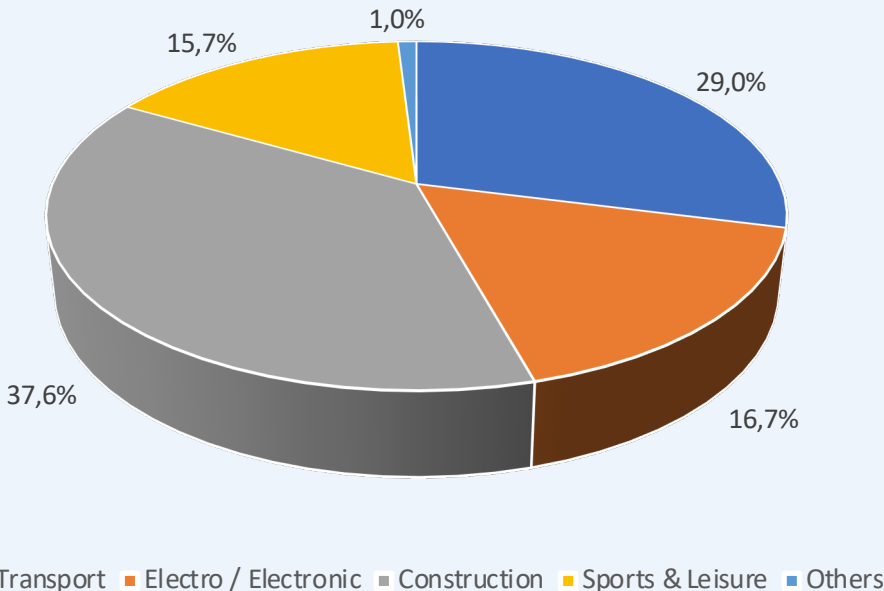


Glass Fibre Reinforcements – Main Material Systems

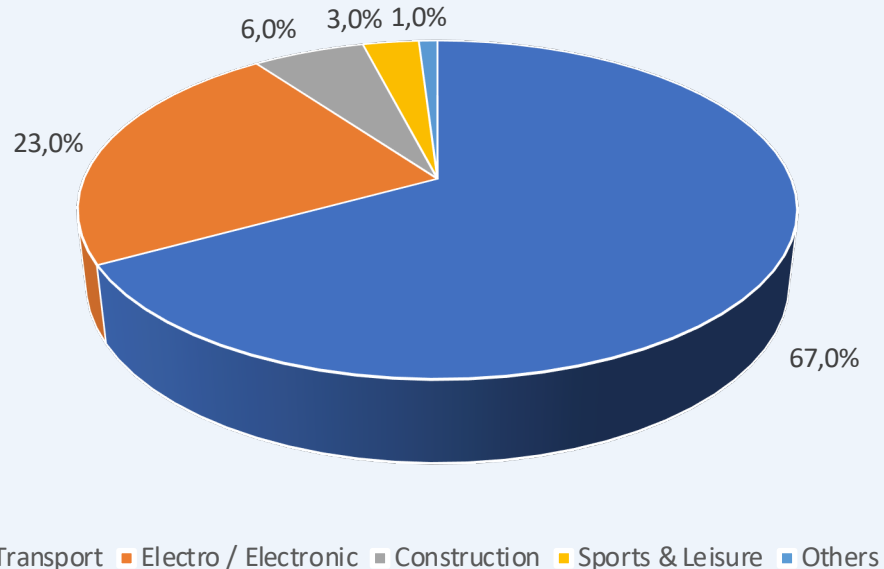


European Composites* Market - Applications

Applications Thermosets



Applications Thermoplastics

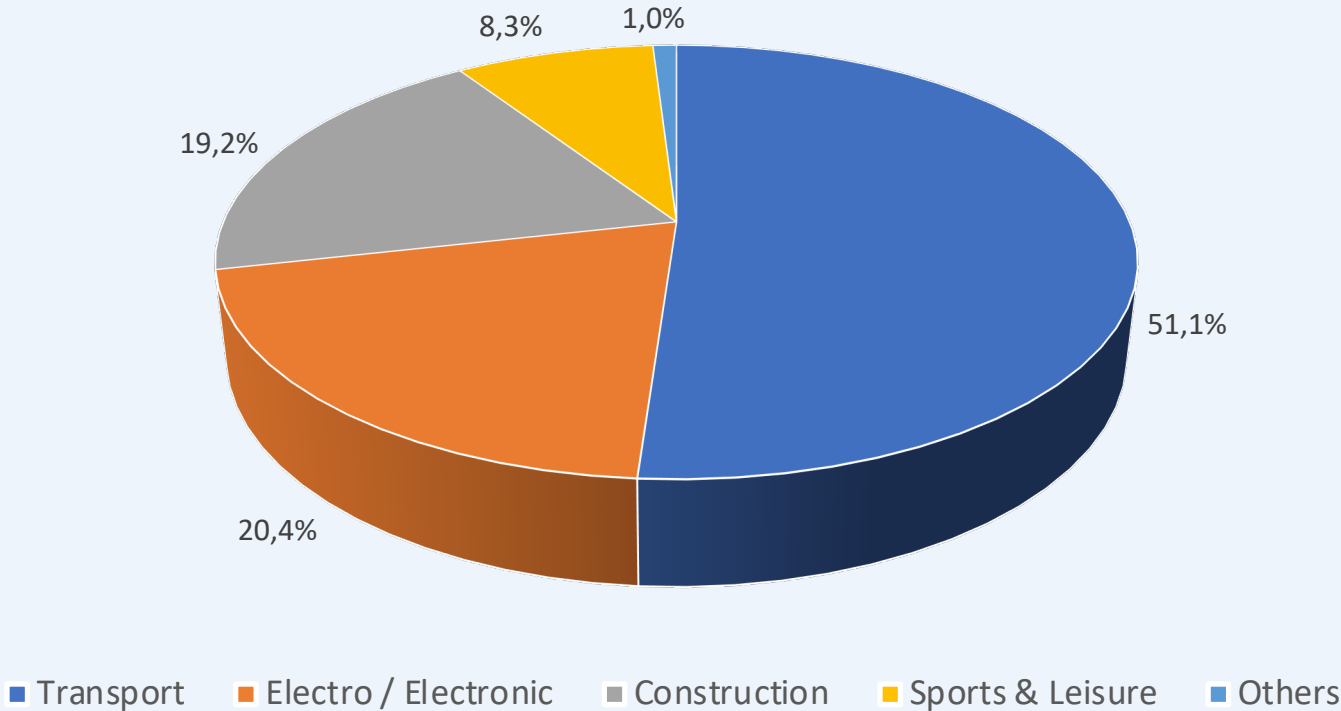


*without CFRP



European Composites* Market - Applications

Applications Thermoset & Thermoplastics



*without CFRP

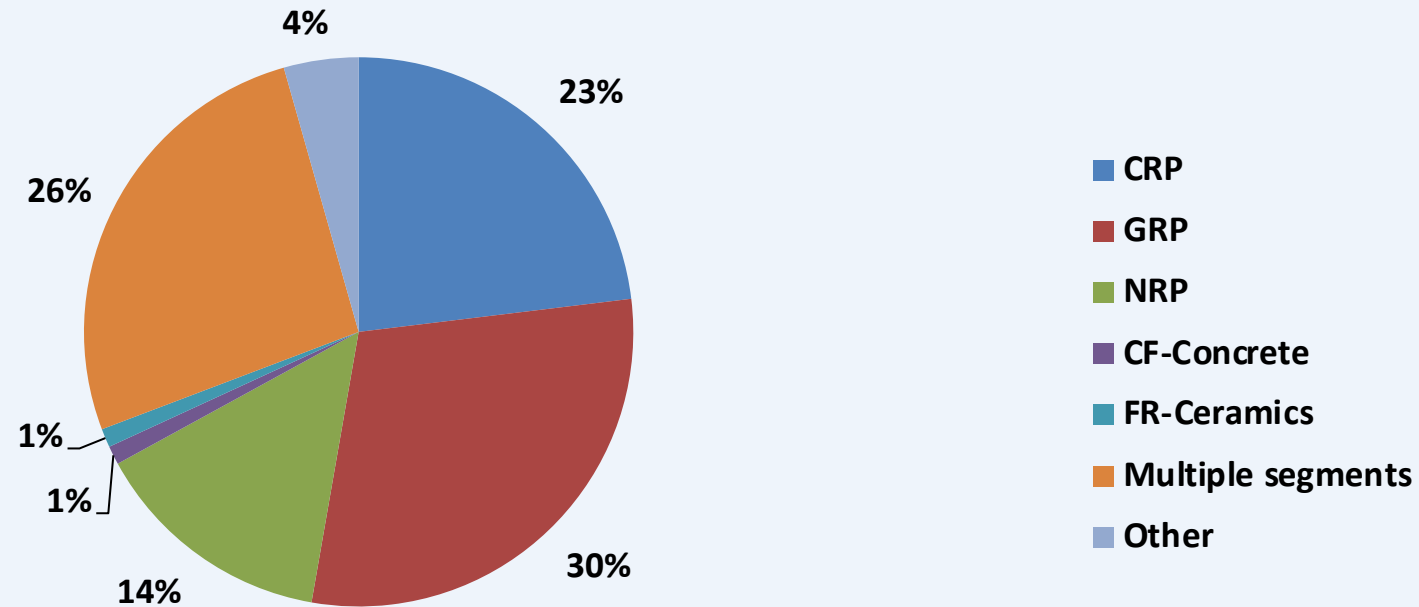


The Composites Market

- Outlook & Trends by Indicators -

Growth Drivers - Material

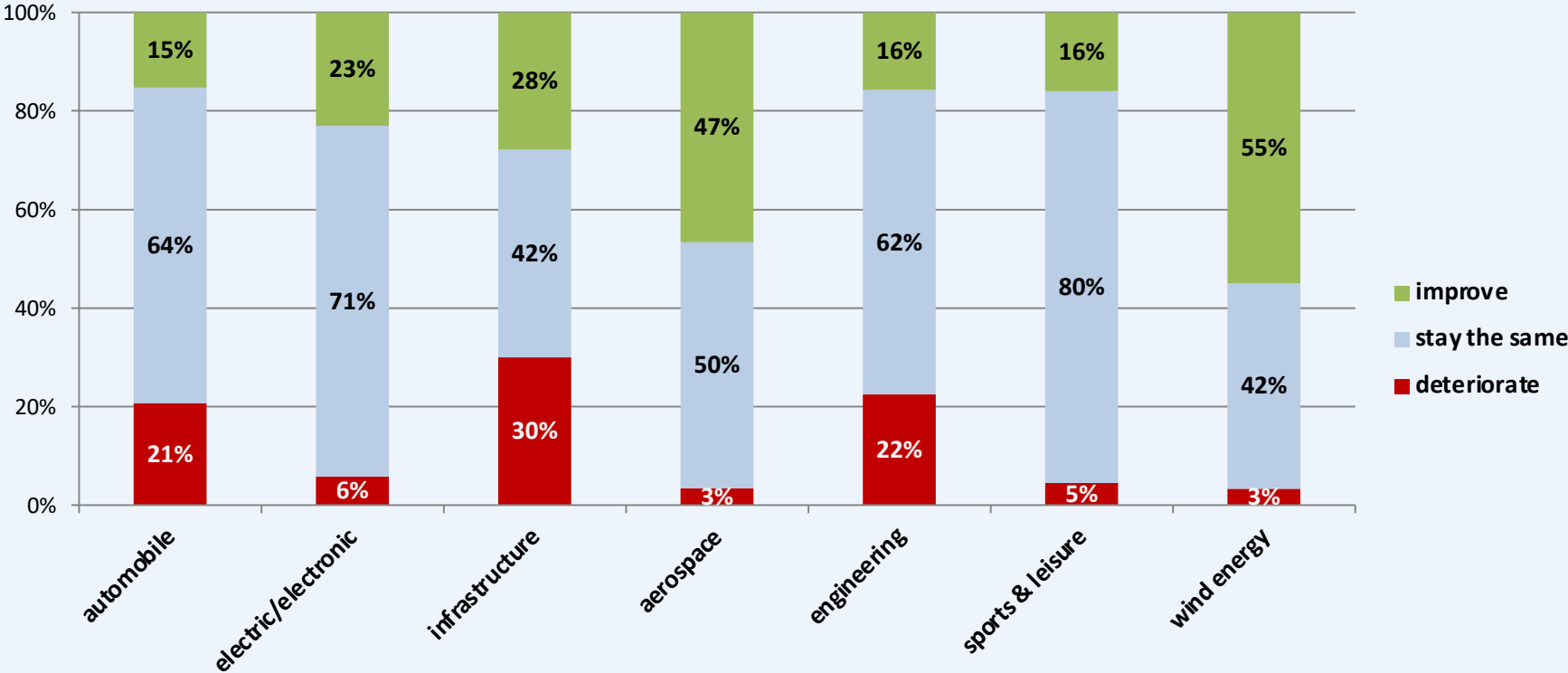
- As in the previous survey, GRP is expected as the future growth driver in the Composites market: **Survey 1/2023 (August 2023)**



Source: Composites Germany Market Survey - 100% missing data resulting from rounding inaccuracies

Growth Drivers - Applications

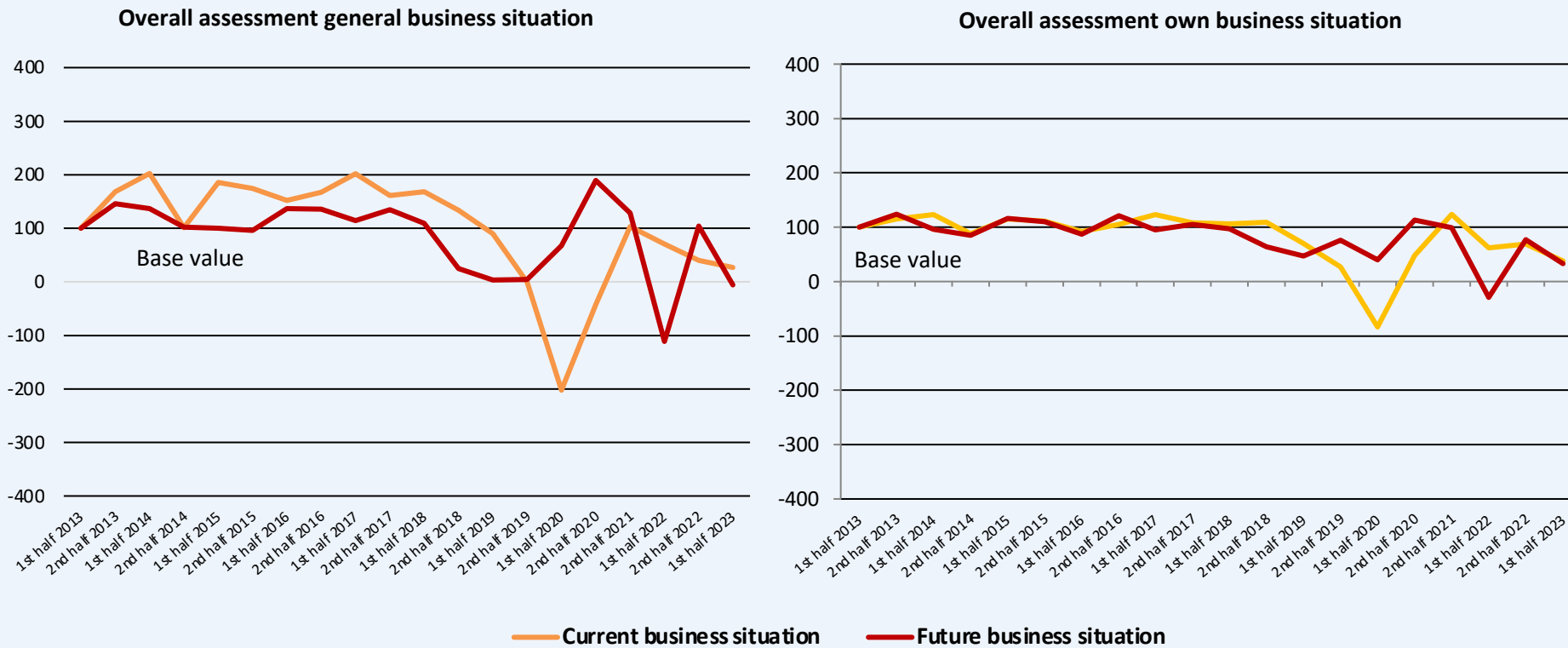
➤ Respondents believed that areas for Composites applications will develop very differently over the next six months: **Survey 1/2023 (August 2023)**



Source: Composites Germany Market Survey - 100% missing data resulting from rounding inaccuracies

Composites Development Index

- Respondents believed that areas for Composites applications will develop very differently over the next six months: **Survey 1/2023 (August 2023)**



Source: Composites Germany Market Survey; **Note:** The Composites Index 1st half 2021 could not be generated due to a data breach! – index: 1st half 2013= 100

Key Findings

- **Enormous increase of prices in the last years**
 - ... but indicators show a clear calming of the markets (logistics, energy prices)
- **General political situation remains tense - High uncertainties**
- **Consume climate is not developing well**
- **Main application industries face challenges**
 - ... but also high potential esp. for construction & mobility applications due to material properties
 - ... Redesign-Thinking in mobility offers a lot of chances
- **Digitalization (e.g., autonomous driving, smart cities; IoT, ...) opens numerous possibilities**
- **Material advantages (beneath lightweight potential) become better known**
- **LCA-Advantages in several Applications**

Co-operations

- a driver for the composites industry -

What we do in the fields of co-operation

- Strong network with other organizations
 - Event Co-operations (e.g.):



- Projects (national & Europe)



T3-Hub



What we do in the fields of co-operation

- Strong network with other organizations
 - Press (regular basis) e.g.:



What we do in the fields of co-operation

- **Strong network with other organizations**
 - **Regular Technical exchange (inside the composites industry and beyond) e.g.**



What can we do together?

Thanks a lot for your attention!

- let's stay in contact -

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