



# The GRP / Composites Market



- Development, Trends & Market Drivers -

6<sup>th</sup>-7<sup>th</sup> of February, 2018 – TÜV Süd: „GFK-Unlimited“, Munich

# Market Drivers – Transport

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- **Automotive:**
  - **Thermoplastic Materials:** 
  - **Carbon “Hype”:** 
  - **Increase of Multimaterial-Systems expected**
  - **“Renaissance” of “old” production methods (SMC)**
  - **Lightweight is ONE but not the only argument for Composites (E-Mobility, drive system, ...)**

# Market Drivers – Transport

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- **Aerospace:**
  - **Composites as “standard” material**
  - **Less price-sensitive than other markets**
  - **Development of new serial process technologies blaze the trail for increase of usage**

# Market Drivers – Building & Construction

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- Design freedom and material properties as key drivers
- Standardization as hurdle for usage of composites
- High future expectations: new markets / applications
- Showcase projects: lack of production volume
- Pultrusion & sheets: attract high attention



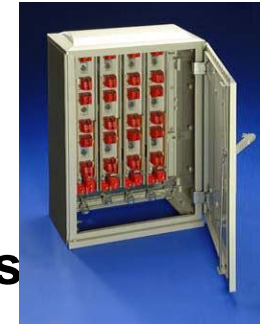
# Market Drivers – Electro/Electronics & Others

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- **Electro/Electronics:**

- **Focus on material properties**

- **Material enhancement & new material developments**



- **General:**

- **Knowledge about composites grows**

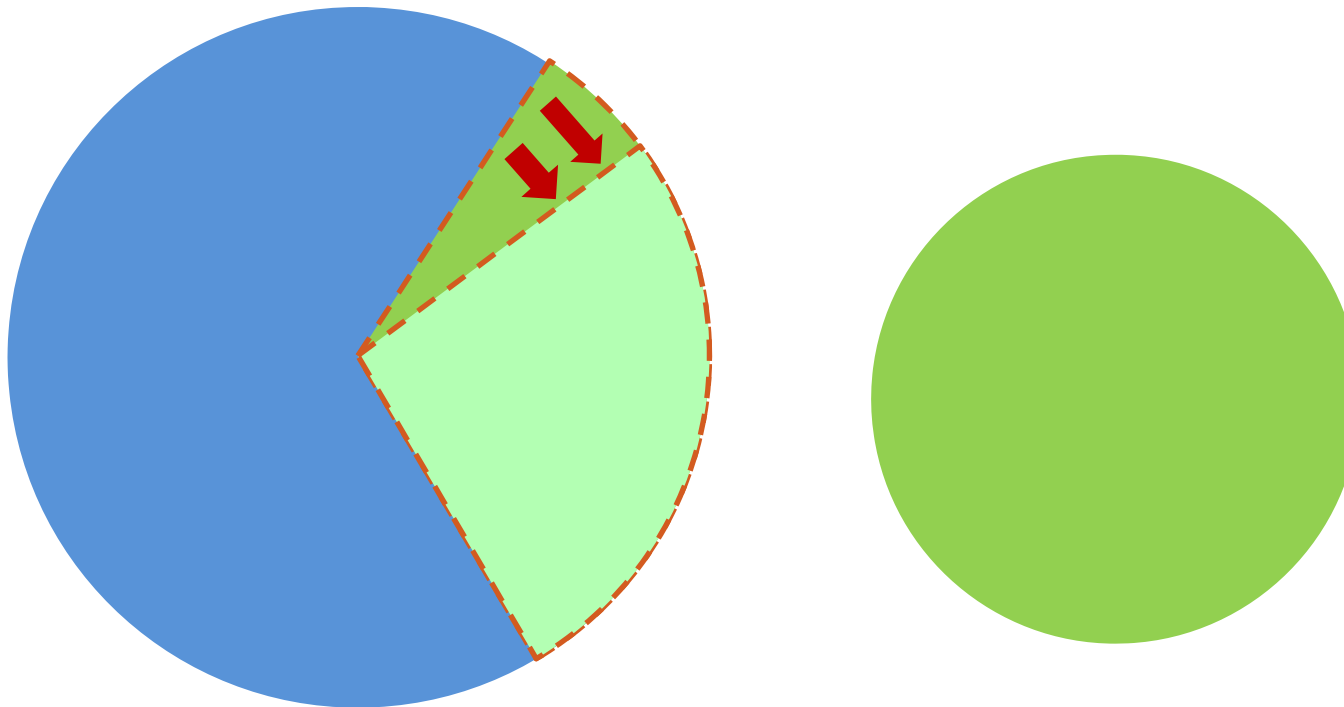
- **Composites are ideal partners in Multimaterial-Systems**



# The Worldwide Composites Market (2016)

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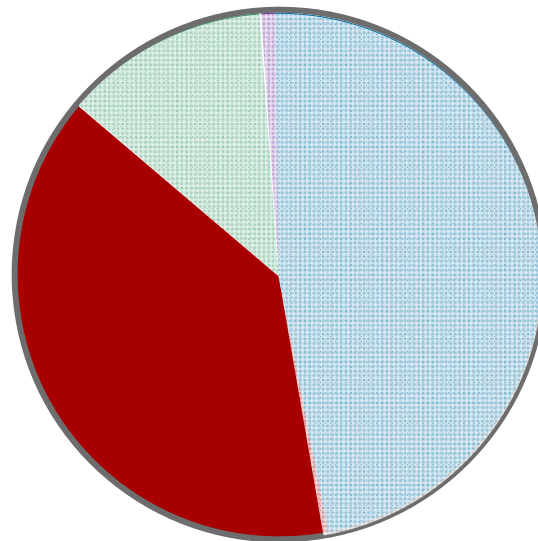
- **Worldwide production volume** ~ 9-10.000 kt **grows**
- **European production volume** ~ 2.800 kt **grows**
- **Production share Europe** **declines**



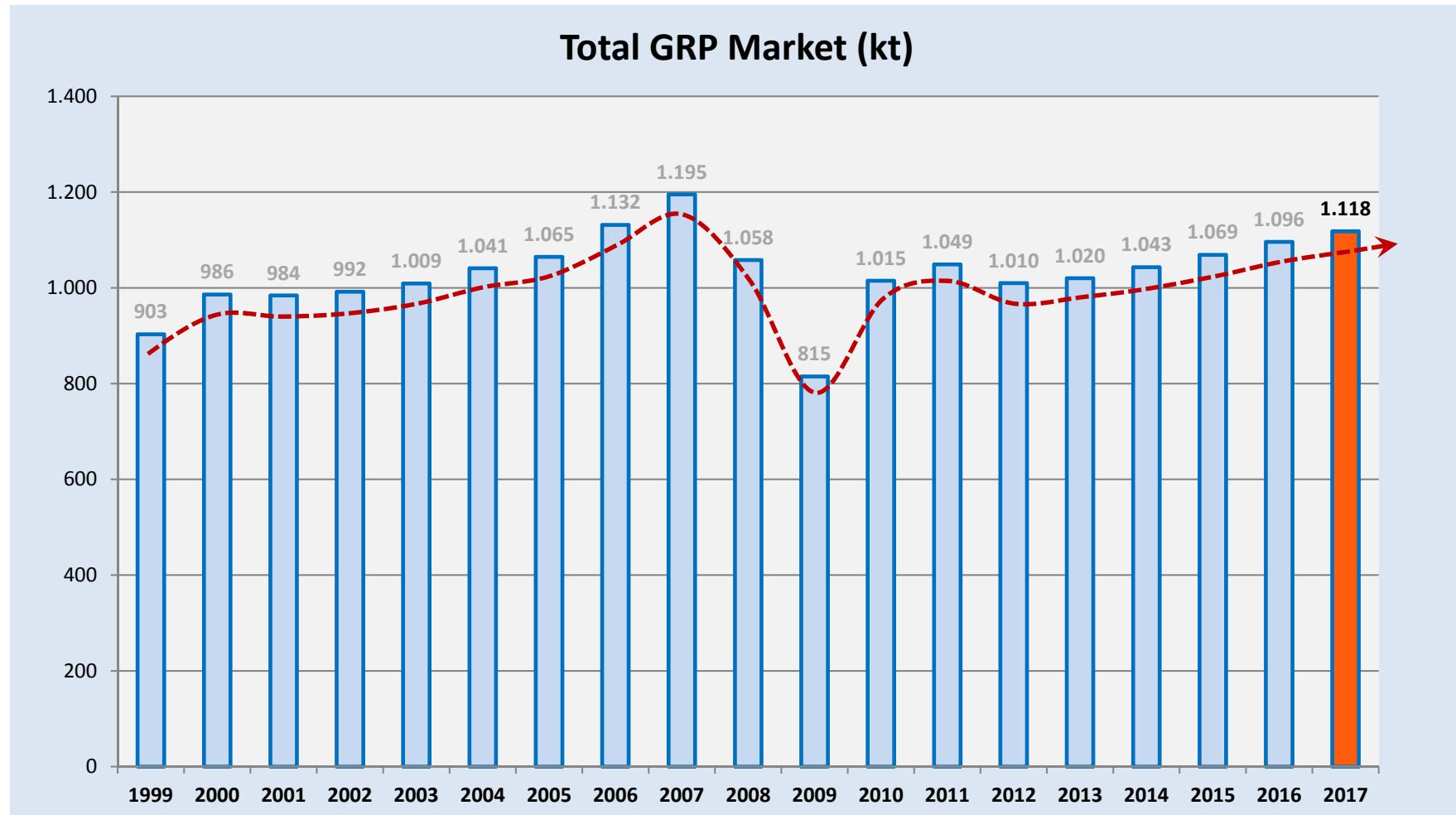
# The European Composites Market (2016)

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- **Whole European Market** ~ 2.800 kt (~ 1/3 world)
- **Short Fiber Reinforced Thermoplastics** 1.300 kt
- **Glass Fiber Reinforced Plastics (GRP)** 1.096 kt
- **“Infusion” Market** ~ 350 kt
- **Carbon Fiber Reinforced Plastics** ~ 35 kt



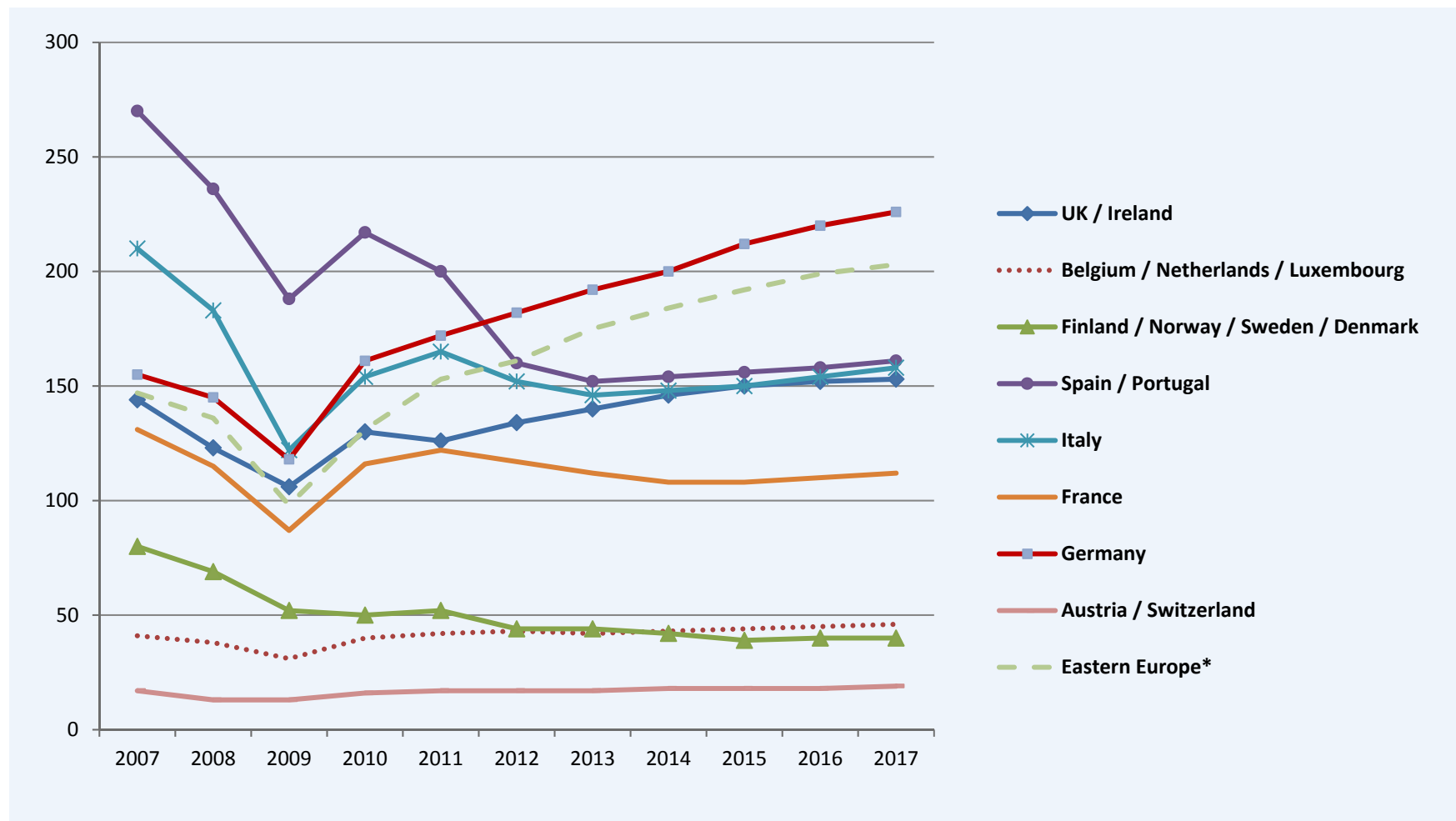
# GRP Production Europe



2017 = estimated



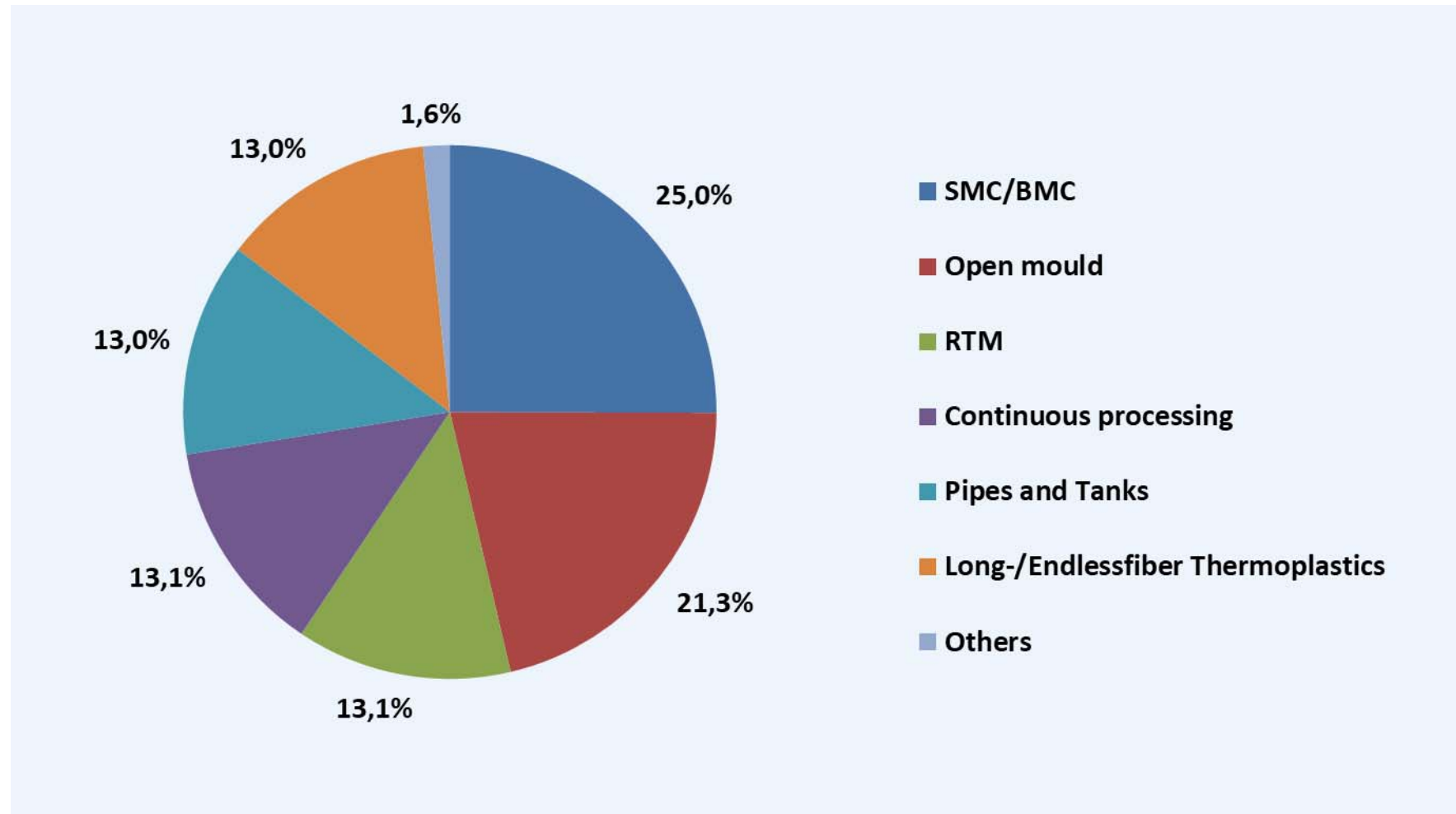
# GRP Production Europe – Development (kt)



2017 = estimated

\* Eastern Europe = Poland, the Czech Republic, Hungary, Rumania, Serbia, Croatia, Macedonia , Latvia, Lithuania, Slovakia, Slovenia

# GRP Production Europe (2017) - Market Segments





**Thanks a lot for your attention!**

**- Let's stay in contact -**

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