

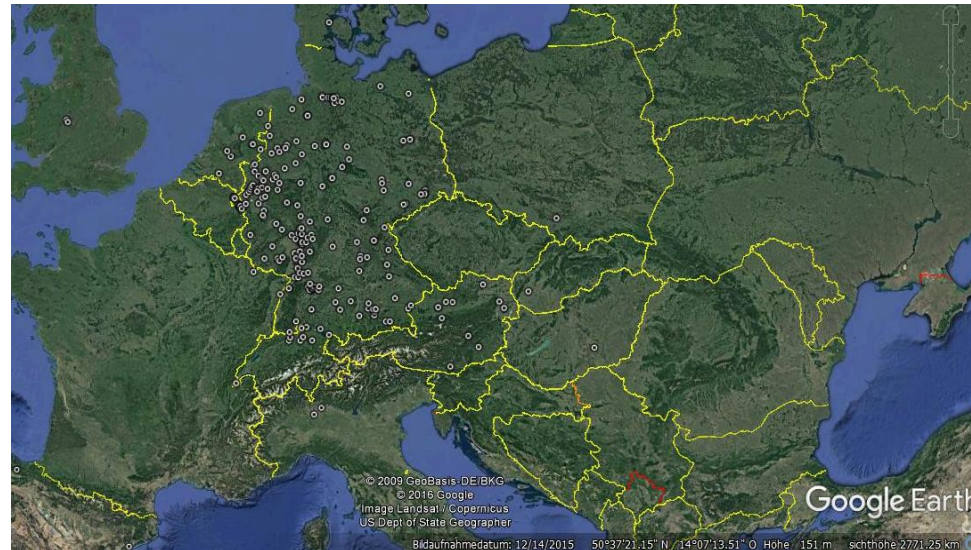
# Der Composites Market

- Entwicklungen & Trends -

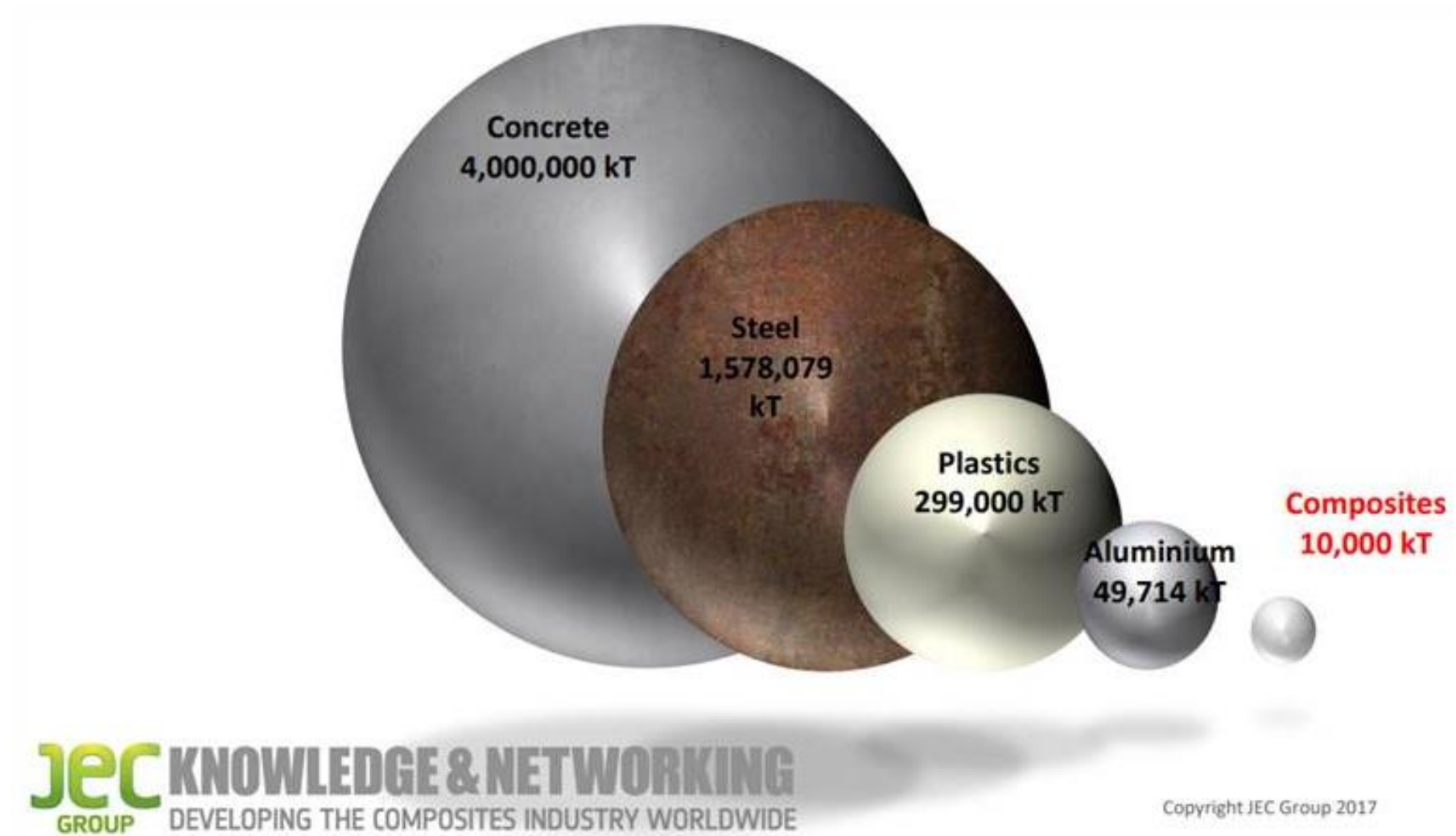
01. April 2019 – HANNOVER MESSE – Industrial Supply

# AVK – The Organisation

- **Founded in 1924**
- **Members along the entire value-added chain in the area of reinforced plastics**
- **> 230 (inter)national member companies (1/4 non German)**
- **> 1700 personal contacts inside the companies**



# The Composites Market (2017)

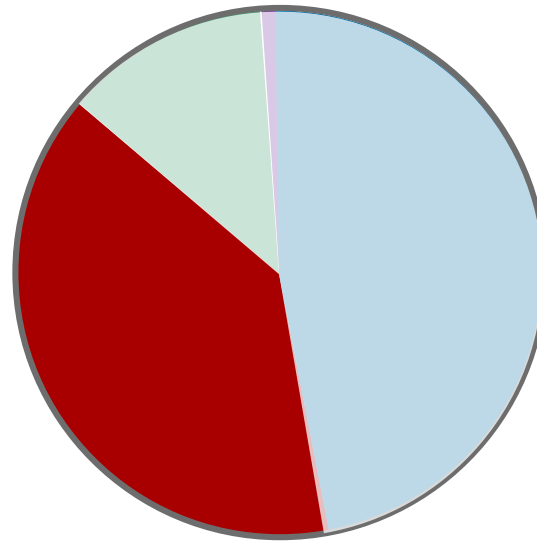


Source: [http://images.jeccomposites.com/conference-france-9-fev-2017/presentations/9H30\\_F\\_REUX\\_JEC\\_9-02-2017.pdf](http://images.jeccomposites.com/conference-france-9-fev-2017/presentations/9H30_F_REUX_JEC_9-02-2017.pdf)

# The European Composites Market (2017)

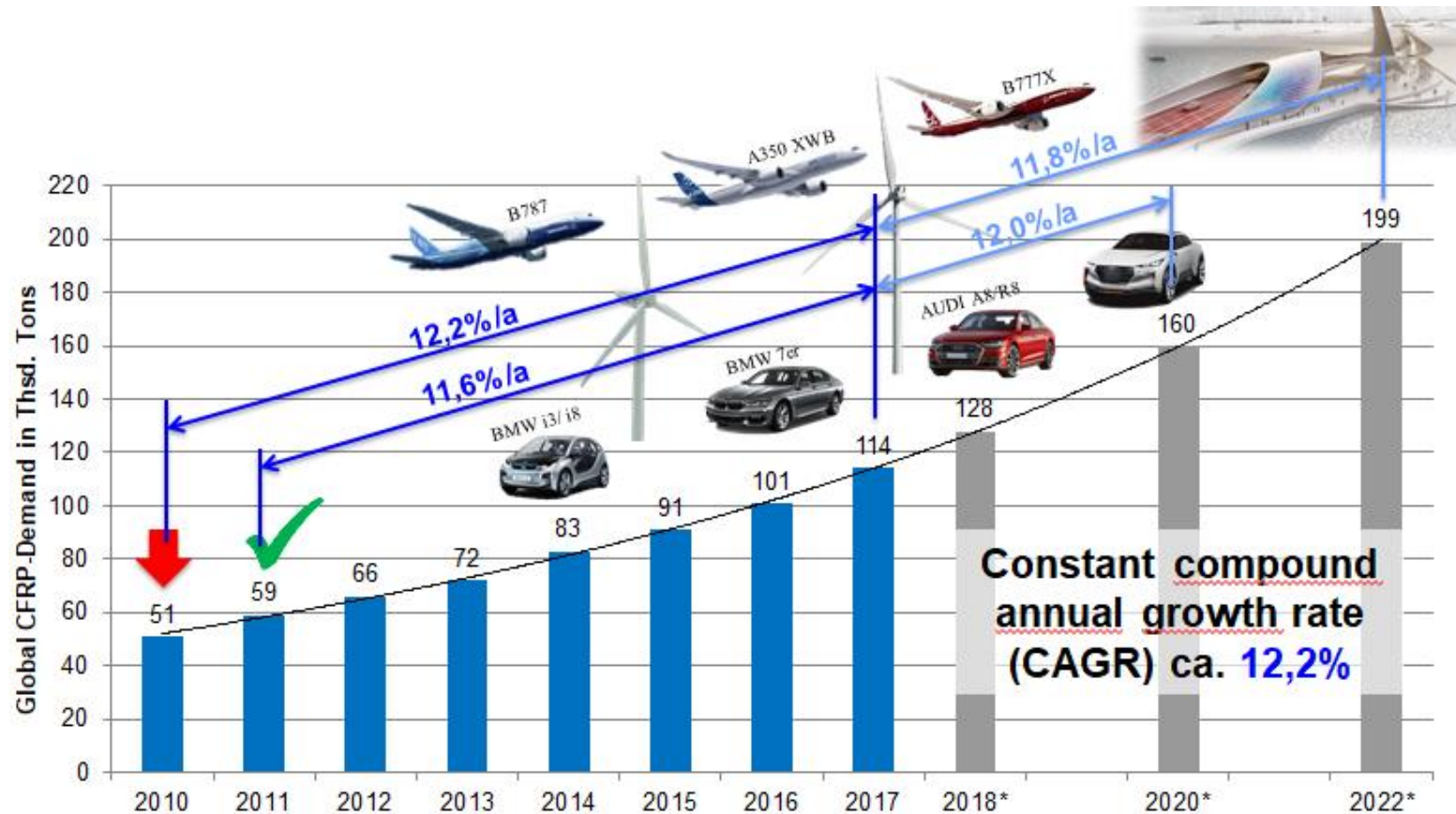
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- **Whole European Market** ~ 2.950 kt (< 1/3 world)
- **Short Fiber Reinforced Thermoplastics** 1.470 kt
- **Glass Fiber Reinforced Plastics (GRP)** 1.118 kt
- **“Infusion” Market** ~ 300 kt
- **Carbon Fiber Reinforced Plastics** ~ 50 kt



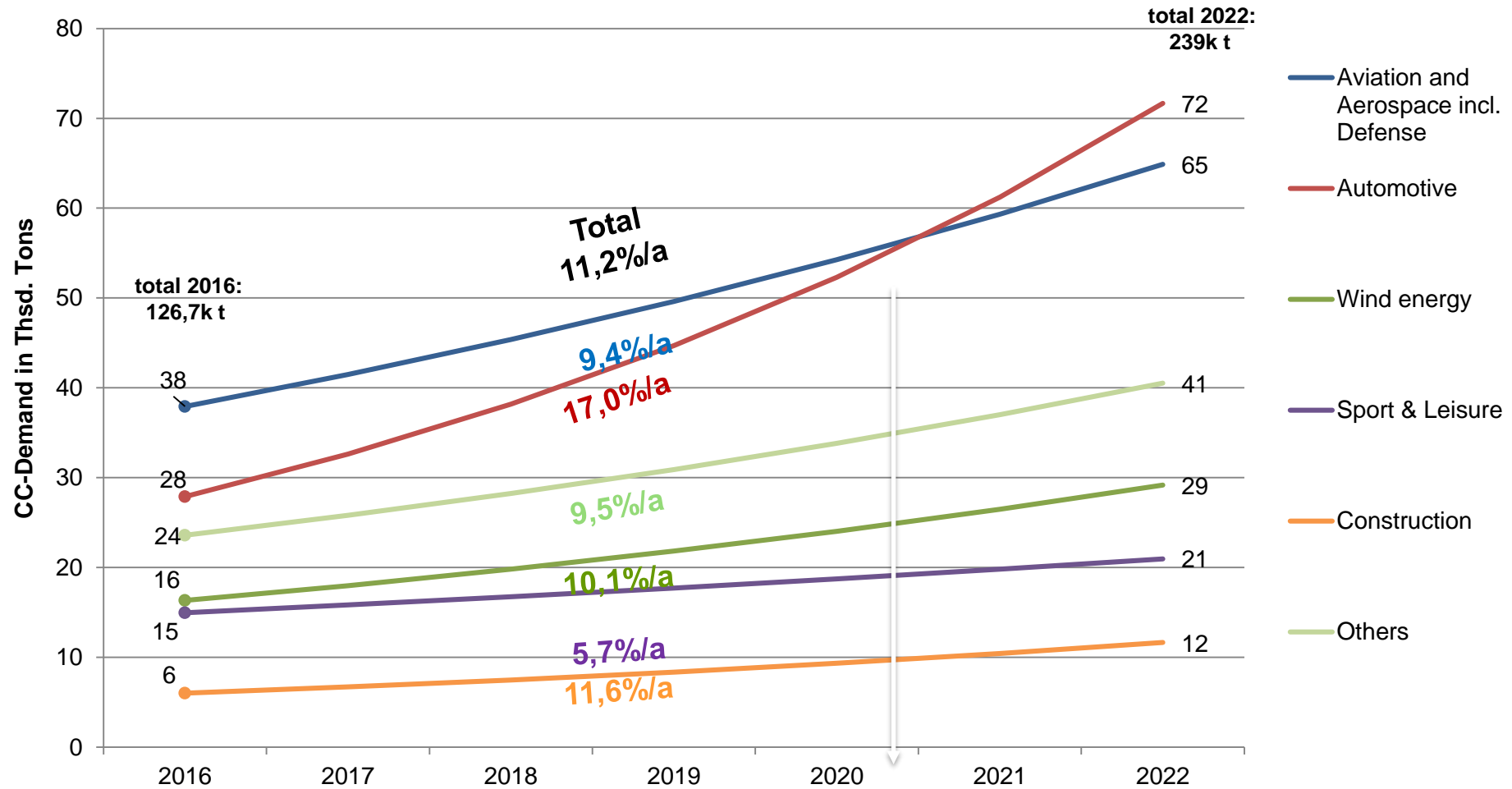
# Global CFRP Market

- Global demand of CFRP in thousand tons from 2010 to 2022.



Source: „The global CF and CC market 2018” - Michael Sauter, Carbon Composites, 4th ICC - Stuttgart

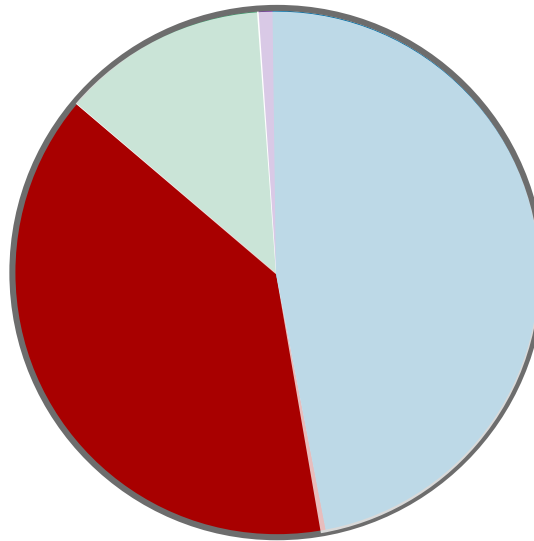
# Global CC-Demand by Application - Trends



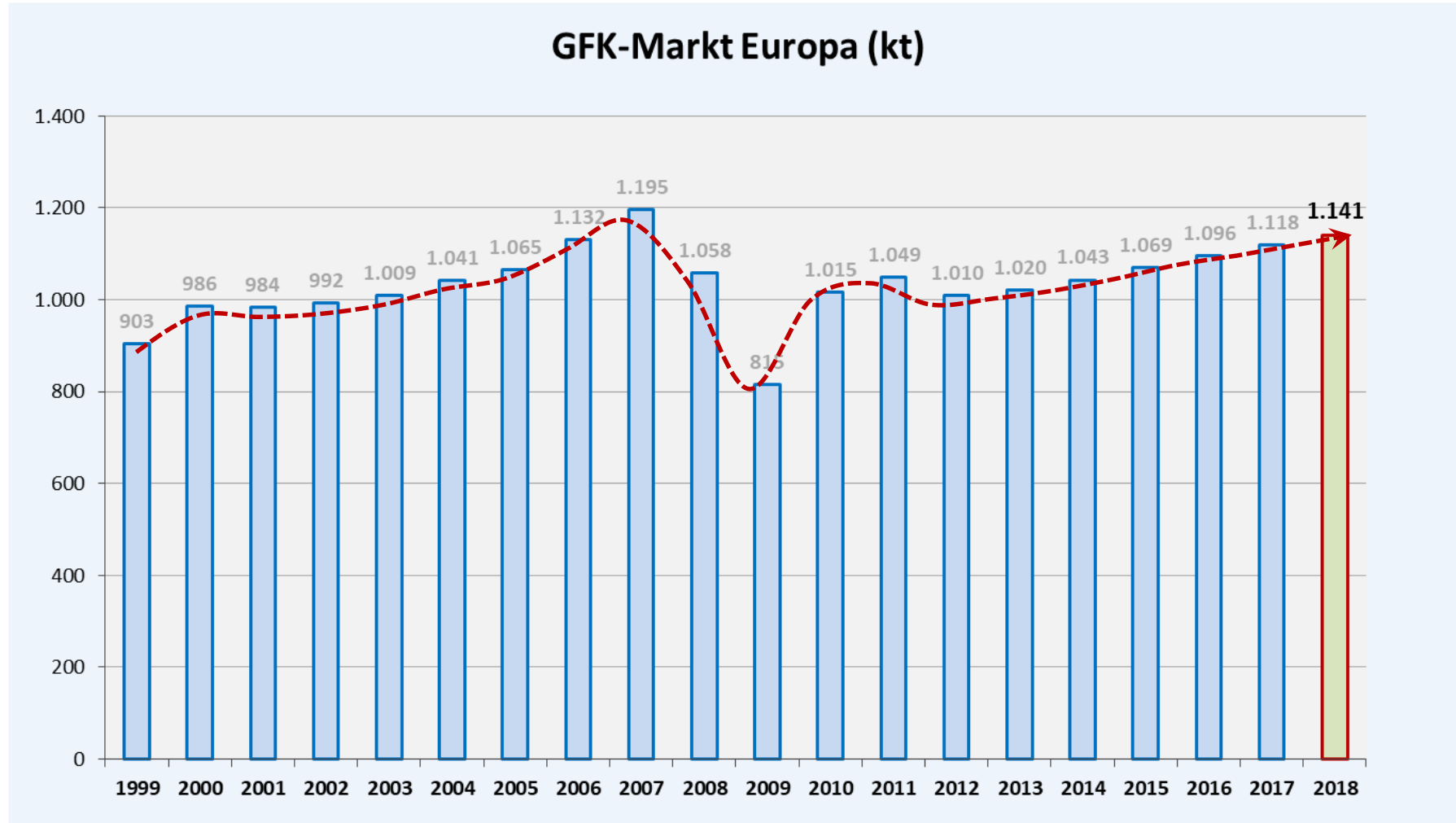
Source: AVK / CCeV Market Report 2017 – Carbon Composites

# The European Composites Market (2017)

- |                                         |                          |
|-----------------------------------------|--------------------------|
| ➤ Whole European Market                 | ~ 2.950 kt (< 1/3 world) |
| ➤ Short Fiber Reinforced Thermoplastics | 1.470 kt                 |
| ➤ Glass Fiber Reinforced Plastics (GRP) | 1.118 kt                 |
| ➤ “Infusion” Market                     | ~ 300 kt                 |
| ➤ Carbon Fiber Reinforced Plastics      | ~ 50 kt                  |



# GRP Production Europe (kt)

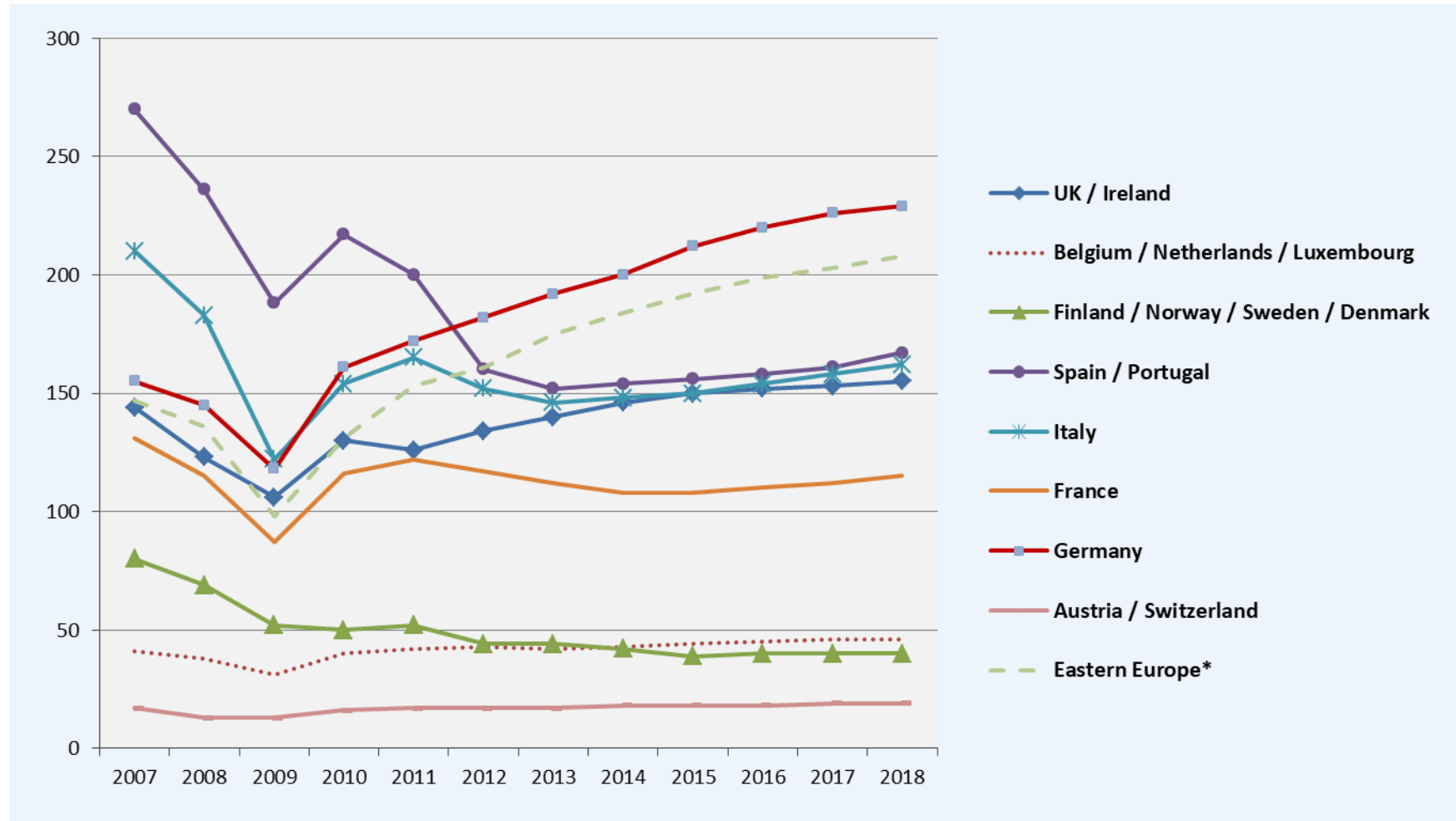




# GRP Production Europe (kt)

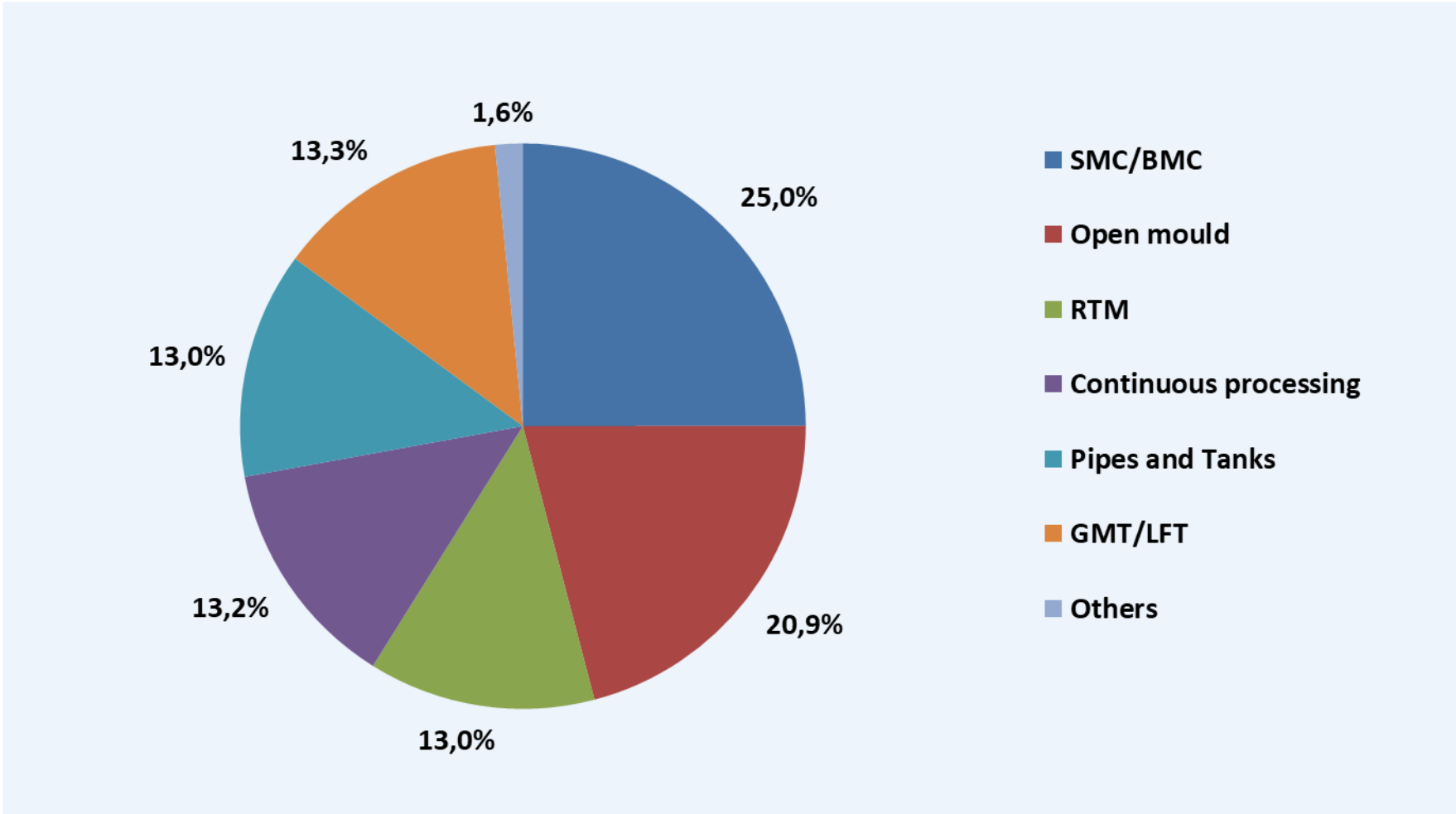


# GRP Production Europe – Development (kt)

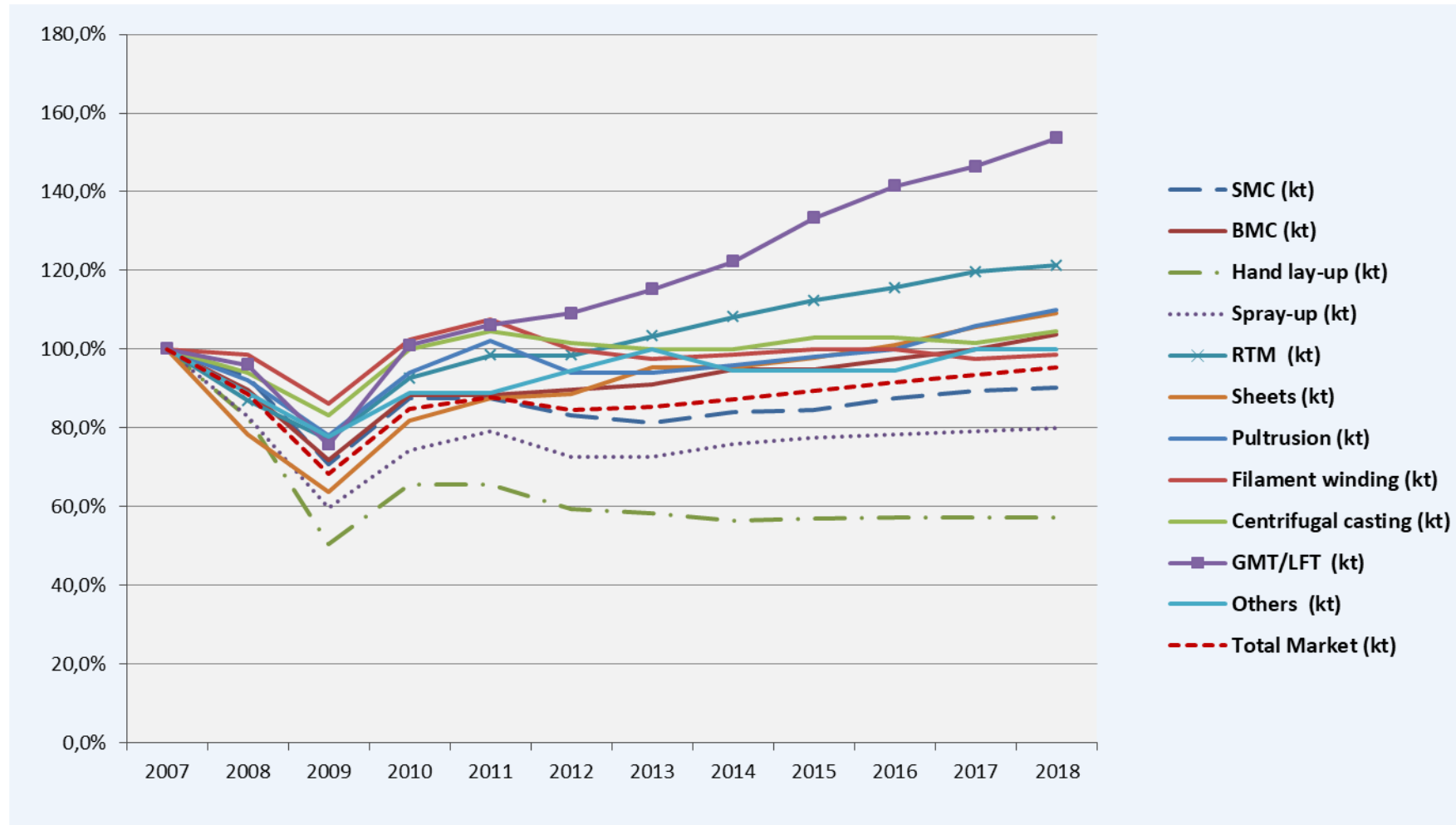


\* Eastern Europe = Poland, the Czech Republic, Hungary, Rumania, Serbia, Croatia, Macedonia , Latvia, Lithuania, Slovakia, Slovenia

# GRP Production Europe (2018) - Market Segments

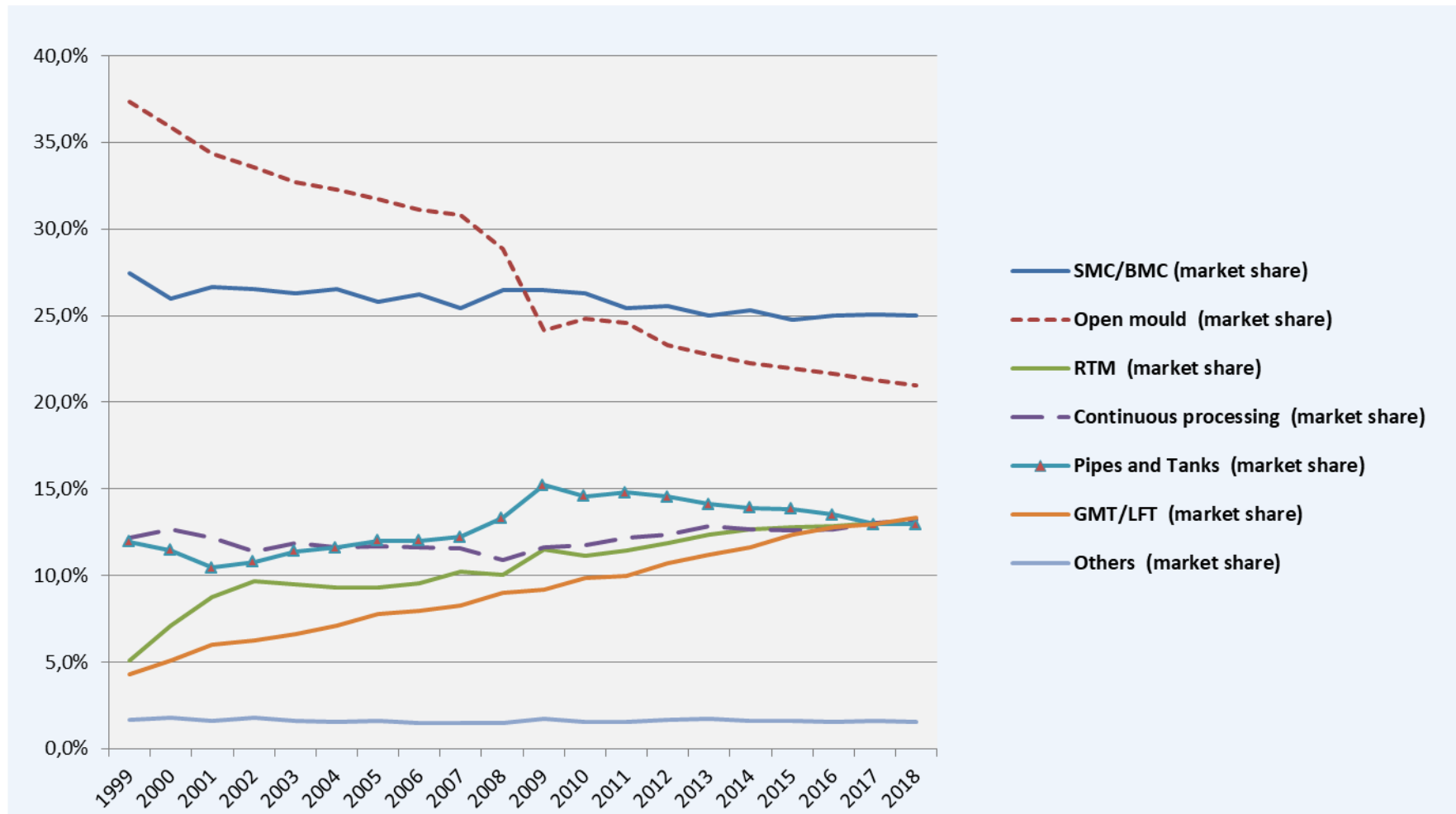


# GRP Production Europe – Market Segments



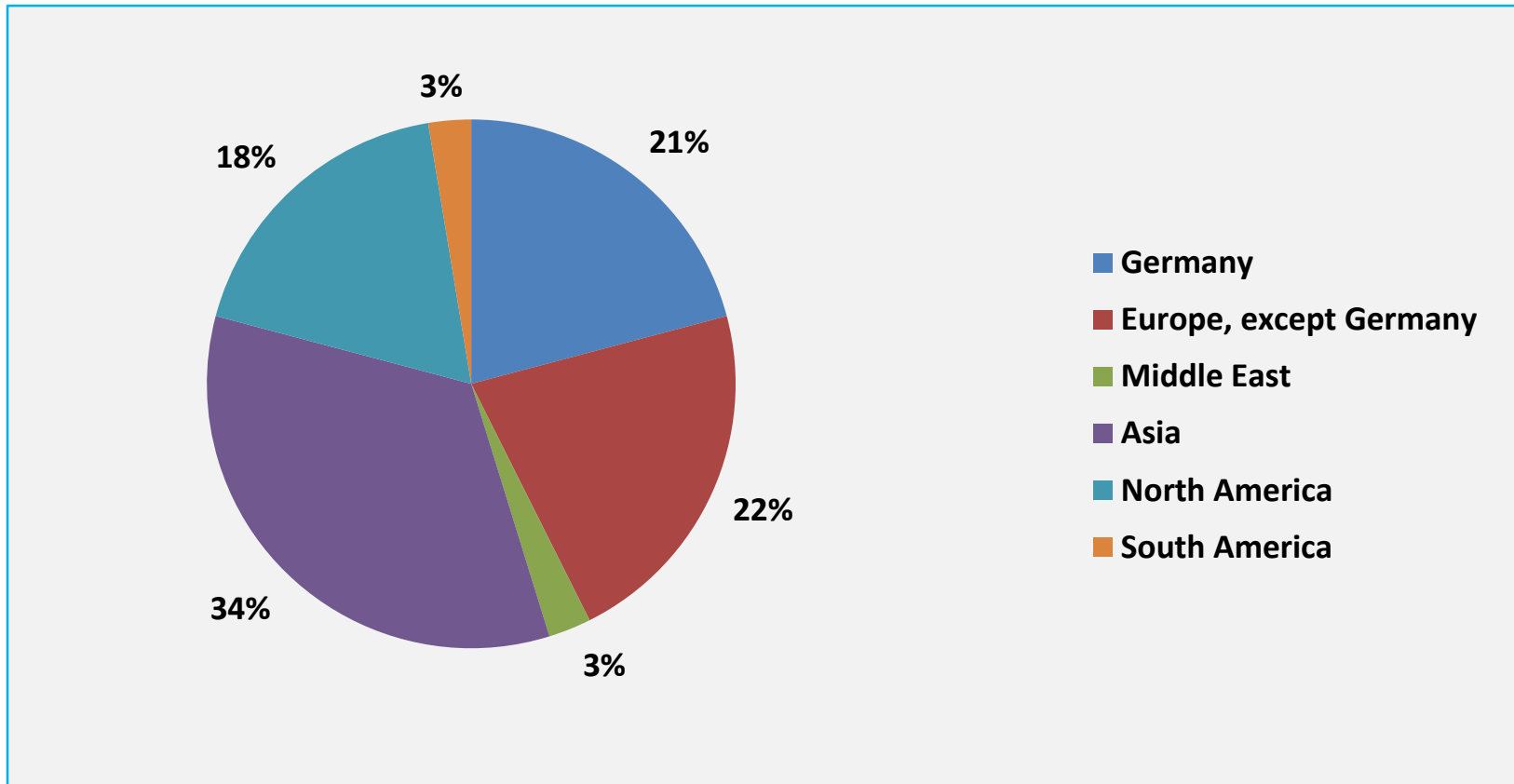
2018 = estimated; Base-Value: 2007=100

# GRP Production Europe – Market Segments



# Growth Drivers - Regional

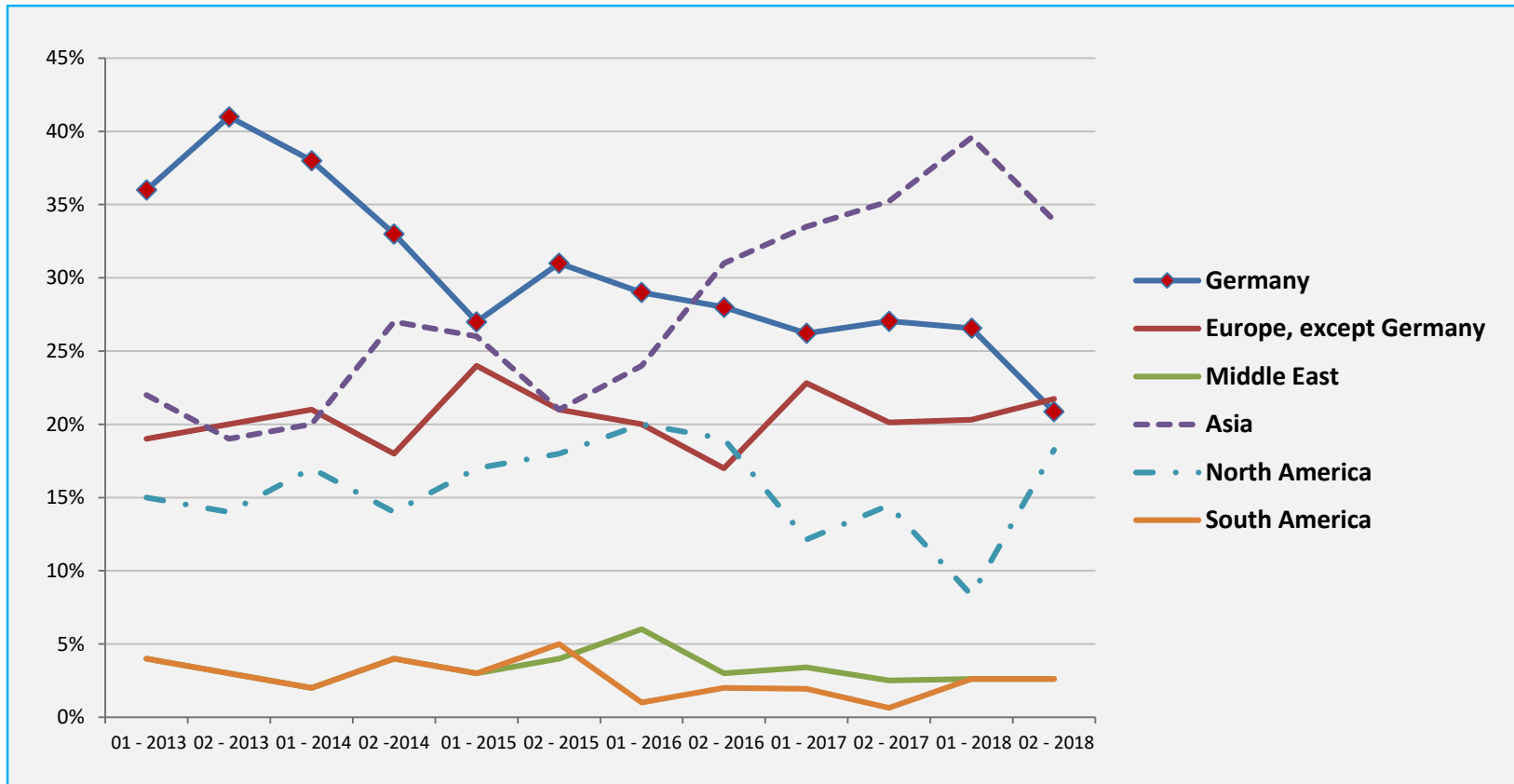
- Future growth drivers as expected by the participants of the Composites Market survey – **2<sup>nd</sup> half 2018**



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

# Growth Drivers - Regional

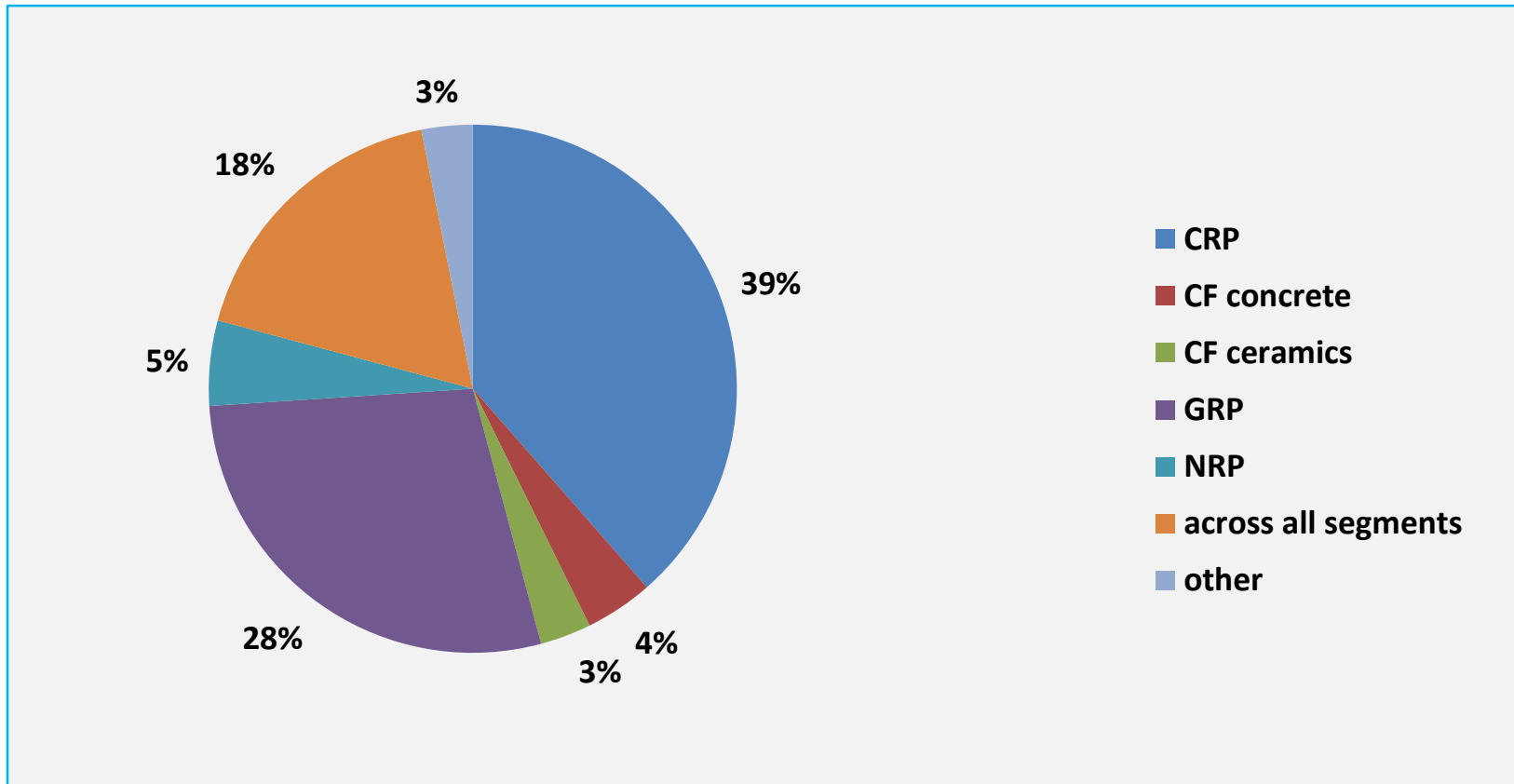
- Future growth drivers as expected by the participants of the Composites Market survey – **Development**



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

# Growth Drivers - Materials

- Future growth drivers as expected by the participants of the Composites Market survey – **2<sup>nd</sup> half 2018**

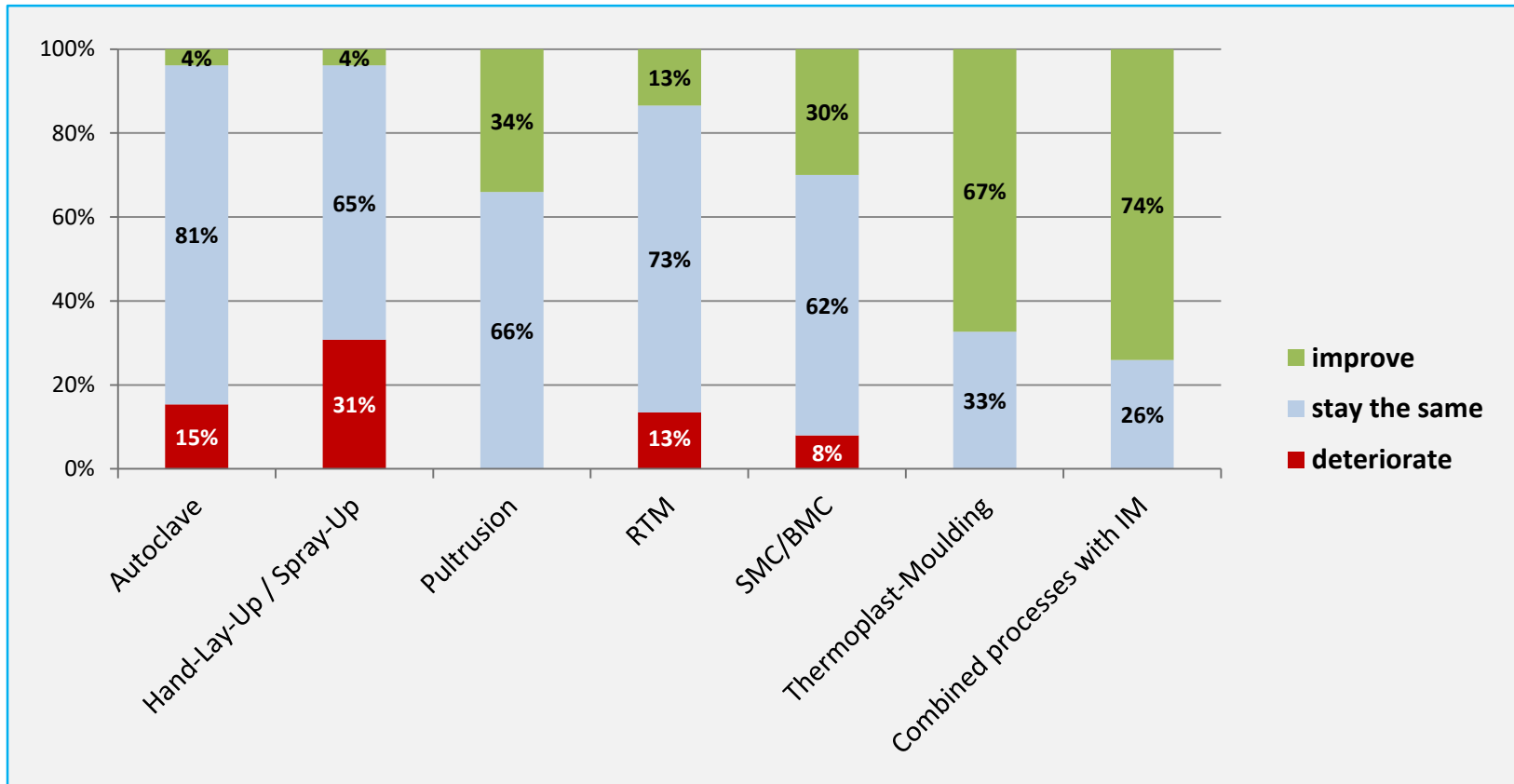


Source: Composites Germany – Composites Market Survey; 100% missing data resulting from rounding inaccuracies



# Growth Drivers - Processes

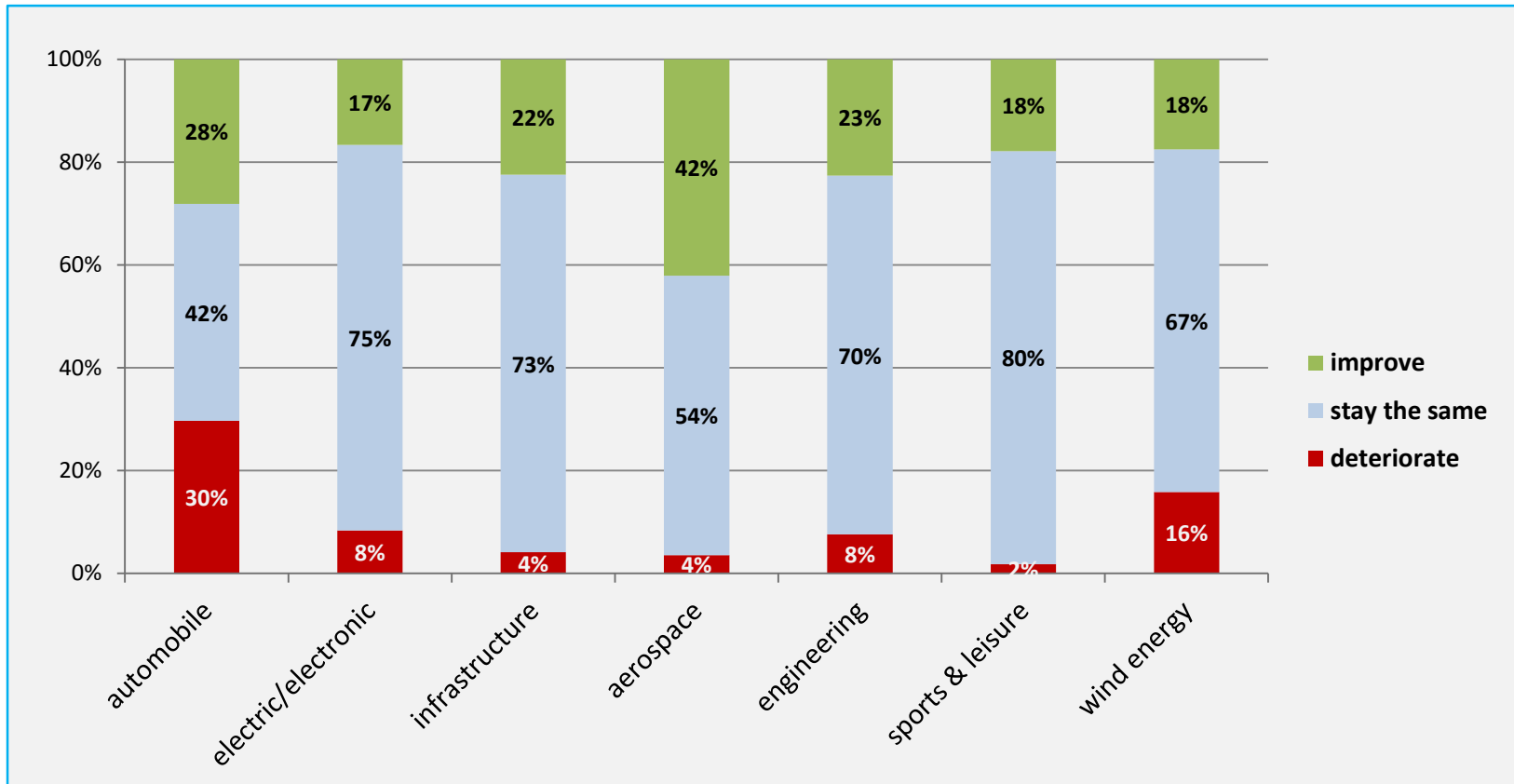
- Expectations concerning the development of different processing techniques –  
**2<sup>nd</sup> half 2018**



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

# Growth Drivers - Applications

- Expectations concerning the development of different areas of applications –  
**2<sup>nd</sup> half 2018**



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

# Trends & Market Drivers



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# Thanks a lot for your attention!

- Let's stay in contact -

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