

The European Market for Fiber Reinforced Plastics / Composites 2025

Now is the right time to strengthen collaboration
between Europe and Turkiye in the field of composite...

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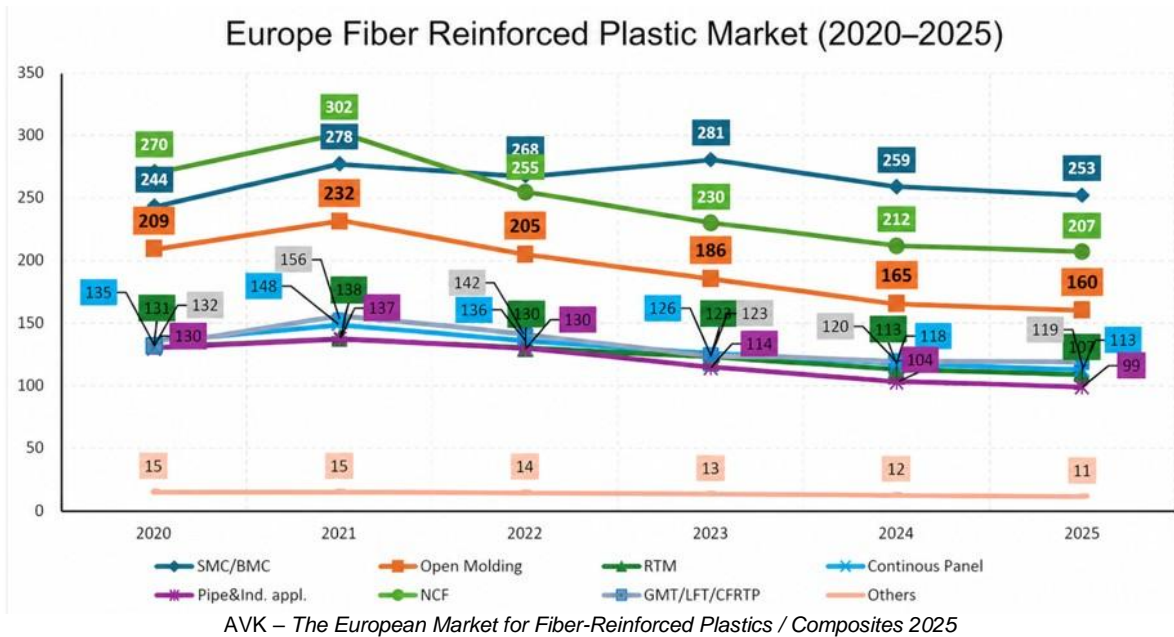
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According to AVK's assessment of the European composites market in 2025, European composites production is declining; however, demand is developing positively. Lightweighting, strength, corrosion resistance, low maintenance requirements, electrical insulation, compatibility with new applications (antenna systems, 5G networks), sustainability, and infrastructure investments are supporting demand for composite materials. On the other hand, in order to reduce Europe's dependence on Asia, increasing cooperation with raw material, semi-finished product, and finished product manufacturers in Turkiye's composites market in the near region would create significant business opportunities for both sides and make a positive contribution to the development of the European composites market in key sectors such as automotive, construction, infrastructure, and defense.

I would like to share with you, under the main headings below, the key parts of AVK's annual assessment report covering developments in the European Reinforced Plastics / Composites market in 2025:

- European composites production volume decreased by approximately **3% in 2025, falling to 2,281 kt**. By contrast, the global composites market is assessed in the range of approximately **13.3-15.9 million tonnes**, and global market growth is reported to be around **1%**.
- Although there is a positive trend in demand for composite products, European manufacturers are losing competitiveness. **Demand is increasingly being met by non-European producers**. In particular, Asian suppliers and manufacturers are increasing pressure on Europe, both in raw materials and finished products.

- The decline in composites market production, structural problems in the automotive sector, energy costs, bureaucracy, environmental regulations, high labor costs, and price competition from Asia can be summarized as the key challenges in the European market. European composites market production, which has been on a downward trend since 2021, has lost approximately **25% of its total production volume** since 2018.



2024–2025 Change

Segment	2025 (kt)	2024 (kt)	Difference (kt)	Change (%)
SMC/BMC	253	259	-6	-2,3%
Open Molding	160	165	-5	-3,0%
RTM	109	113	-4	-3,5%
Continuous Lamination	113	118	-5	-4,2%
Pipe & Ind. Appl.	99	104	-5	-4,8%
NCF	207	212	-5	-2,4%
GMT/LFT/CFRTP	119	120	-1	-0,8%
Other	11	12	-1	-8,3%

AVK – The European Market for Fiber-Reinforced Plastics / Composites 2025

- In 2025, the largest application area in the European composites market remains the **transportation sector**. Approximately **47.7%** of the total market comes from

transportation, **20.7%** from electrical/electronics, **19%** from construction, **11.5%** from sports and leisure, and **1.2%** from other areas.

- From the perspective of material systems, **thermoplastic composites account for 1,329 kt** (approximately 1.3 million tonnes), representing **58.3%** of the market, while **thermoset composites account for 952 kt** (approximately 0.9 million tonnes), representing **41.7%**. Short glass fiber-reinforced thermoplastics alone have a volume of **1,210 kt** (approximately 1.2 million tonnes) and correspond to approximately **53%** of the total European composites market. This segment consists mainly of glass fiber-reinforced PA- and PP-based applications and is highly dependent on the automotive sector.
- From the perspective of molding and manufacturing processes in Europe, SMC applications hold the highest share (**253 kt**). These are followed by non-crimp fabrics (also known as multiaxial fabrics or stitched fabrics) (**207 kt**), open-molding processes (**160 kt**), RTM (**109 kt**), continuous sheet applications (**113 kt**), and pipe applications (**99 kt**). The report shows that production declined in almost all major process segments in 2025.


Business Opportunities in the European Market by Fiber Reinforced Plastic (FRP) Applications

The European FRP market offers significant business opportunities across a wide range of sectors, particularly in construction, energy, automotive, and infrastructure, driven by rapidly expanding application areas. When evaluated specifically from the perspective of fiber reinforced plastics, both current demand dynamics and evolving regulatory frameworks highlight strategic collaboration opportunities and production advantages for Türkiye and Europe.

Key FRP applications gaining importance in Europe, along with the associated business opportunities, are presented in the table below.

European Composites Market Business Opportunities



01		Construction and infrastructure composites	<p>Construction/infrastructure is the largest application area in thermosets. Pultrusion profiles, bridge reinforcements, facade panels, pipes and storage tanks stand out as long-life, low-maintenance composite solutions. In particular, requirements in Eastern European countries should be evaluated.</p>
02		Pultrusion and 5G infrastructure	<p>Due to radio-wave permeability, corrosion resistance and electrical insulation advantages, antenna/infrastructure applications offer opportunities. Turkey's significant experience in the field of pultrusion may present important opportunities for Europe.</p>
03		SMC/BMC products	<p>The largest segment in the GRP market. Although demand on the automotive side is somewhat weak, opportunities continue in electrical/electronics and charging infrastructure.</p>
04		NCF / multiaxial fabrics	<p>The EU's target to increase wind capacity is strong (approx. 300 GW existing capacity – 2030 target: 425 GW), but production has shifted to Asia. Depending on Europe's desire to reduce its dependence on Asia, near-regional opportunities in the supply chain for multiaxial fabrics and rotor blades can be evaluated.</p>
05		GRP pipe and tank systems	<p>There is an advantage of corrosion resistance and long service life in chemicals, water/wastewater, oil/gas and industrial facilities.</p>
06		Non-automotive thermoplastic composites (LFT/GMT/CFRTP)	<p>Dependence on automotive is risky; aviation, drones, public transport, infrastructure and electrical/electronics applications are alternative growth areas.</p>
07		Hydrogen tanks and filament winding technology	<p>Lightweight hydrogen tanks winoted with carbon fiber and resistant to high pressure have significant potential in the automotive sector in the future. A niche in the short term; a high value-added opportunity in the long term. Closer to the carbon fiber side than glass fiber.</p>
08		Custom production / small series / large-part production	<p>As labor and regulatory costs are high in Europe, the open-molding segment—which is ideal for this type of low-cost production—may shift to nearby production hubs such as Turkey, creating opportunities.</p>
09		Sustainability and material substitution	<p>Longer-lasting, lightweight composite solutions with lower maintenance requirements can be developed in place of steel, aluminum, concrete or conventional plastic.</p>

About the Author

Çağrı Yurddaş is a seasoned professional with over 25 years of experience in the composite industry. During his career at Şişecam, he held roles in sales, market analysis, product management, and strategic planning, developing deep expertise in the Turkish glass fiber market and foreign trade dynamics.

He has represented Türkiye within the European Glass Fibre Producers Association and has taken an active role in anti-dumping processes as well as sectoral data analysis.

Today, under the CompositeIntel umbrella, he provides consultancy services to companies in the areas of market analysis, competitive strategy, and foreign trade data analytics.

For a brief preliminary consultation, you are welcome to contact.



Kind regards,
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