

## **China holds the lion's share in the fiberglass sector.**

### **It is time to support domestic glass fiber production**

April 2026

#### **From Past to Present: Competitive Dynamics in the Glass Fiber Industry**

In this article, I would like to share the evolution of imports in the glass fiber industry over the years and reflect on how the sector has responded to this flow of goods. By revisiting key developments through a combination of industry anecdotes and statistical data, I aim to provide a more comprehensive perspective. While many professionals in the sector are already familiar with these dynamics, I believe that a consolidated evaluation of trade measures and their outcomes will offer valuable insights and help guide future strategies.

Since the early 2000s, imports have gradually increased, and from around 2007 onwards, the domestic market balance between local production and imports has shifted more noticeably in favor of imports. The growing influx of low-priced, predominantly Chinese-origin glass roving products created significant price pressure on domestic producers. During the meetings I attended under the European Glass Fibre Producers Association, the impact of Chinese imports—particularly in terms of price pressure and inventory accumulation—was extensively discussed among members, along with potential measures. As a result of these developments, an anti-dumping investigation was initiated against China, with the initiation communiqué officially entering into force on December 17, 2009.

#### **Challenges in Identifying an Analogue Country in Anti-Dumping Investigations**

A parallel investigation process was also conducted in Türkiye against China. Following the review, it was decided to initiate an anti-dumping investigation, which officially commenced with the publication of the initiation communiqué in the Official Gazette on January 22, 2010.

Although the investigations in the EU and Türkiye were launched around the same period, it is important to underline that the methodologies used by the respective authorities to determine dumping and initiate investigations differ. In both cases, dumping margins were calculated by comparing China's export prices to Türkiye and the EU with the corresponding fair market price (normal value), which was derived using different approaches.

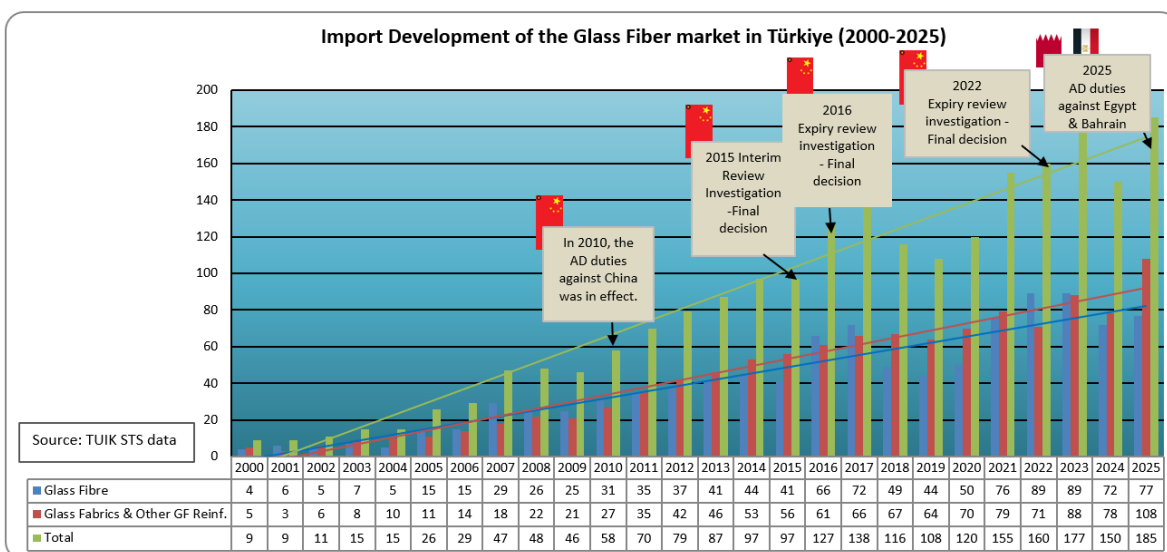
In the EU, the normal value was established by selecting a suitable third country—referred to as an analogue country—representing market economy conditions. In contrast, in Türkiye, the normal value was constructed based on the domestic producer’s cost structure, verified during on-site inspections by the Ministry. This constructed value included production costs, reasonable selling, general and administrative expenses, and a profit margin.

The concept of an analogue country warrants further clarification. In anti-dumping investigations, an analogue country is a third country with a functioning market economy, used to determine the normal value when reliable domestic market data from the exporting country—typically considered a non-market economy, such as China—is unavailable or unreliable.

During the EU’s glass fiber investigation against China, identifying a suitable analogue country proved challenging. Given the simultaneous investigation in Türkiye and our membership in the European Glass Fibre Producers Association, cost and price data of domestic glass fiber manufacturer was used on behalf of Türkiye, selected as the analogue country.

## Have Anti-Dumping Measures Achieved Their Objectives?

Between 2010 and 2025, five separate investigations were initiated in Türkiye against China and its glass fiber investments in neighbouring regions.



### Explanation:

- *Glass Fiber*: Refers to product groups within the domestic producer’s portfolio.
- *Glass Fabrics & Other Glass Fiber Reinforcements*: Includes woven fabrics, multi-axial fabrics, RTM fibers, yarns, and other reinforcement products. No trade measures have been applied to this product group.

Despite these measures, the figures show that imports have continued to increase over time.

Although it is still early to draw definitive conclusions from the most recent figures, preliminary data for January–February 2026 indicate a 30% decline compared to the same period in the previous year. Notably, imports of Egyptian-origin glass fiber—which accounted for 65% of total imports in January–February 2025—decreased by 36% in the same period of 2026. The statistical developments for 2026 continue to be closely monitored. “It is anticipated that, supported by the positive impact of the measures implemented, 2026 will represent a year of relative recovery and improved operating conditions for domestic glass fiber producers.”

### **Rising Imports of glass fabrics and the developments in the domestic weaving market**

Imports of glass fabrics and non-woven reinforcements (including multiaxial fabrics) have also increased significantly over the years, as illustrated in the chart above. While multiple factors contribute to this trend, four key drivers stand out:

- Insufficient domestic production capacity to meet local demand for glass fabrics
- Limited availability of specialized glass fabric varieties from domestic suppliers
- Increased costs of producing glass fabrics domestically due to duties on single-end rovings, making imports of untreated glass fabrics more economically viable
- Re-export activities, where imported glass fabrics are subsequently exported to Europe

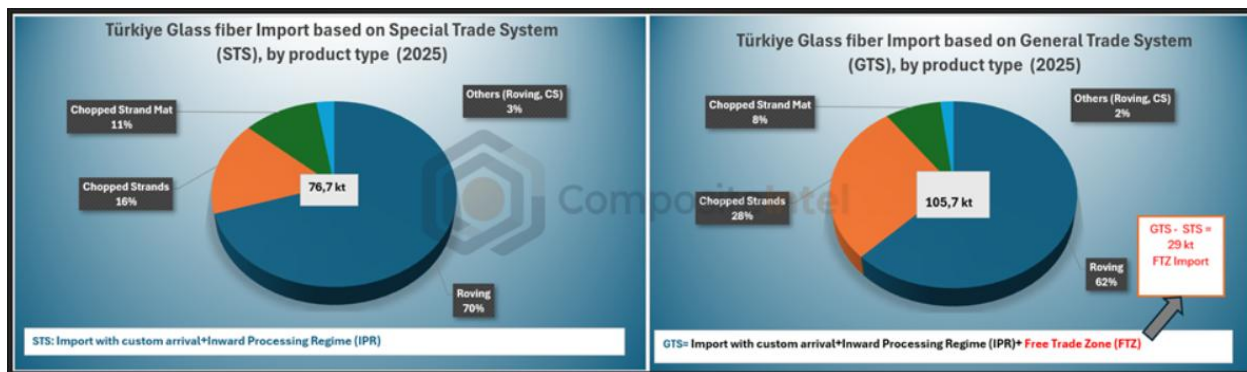
The growth trend in the Turkish glass fabric market, combined with the limited number of domestic producers and the increasing reliance on imports, has once again highlighted the need to assume a strategic role as a domestic supplier of direct roving.

Although the decision of domestic glass fiber producers not to enter the glass fabric segment may be considered a strategic choice, the inability of domestic weaving manufacturers to commit to capacity expansion during discussions with the Ministry in 2011 prevented the initiation of a process based on claims of future injury. Consequently, imports of glass fabric products gained significant momentum in the following years.

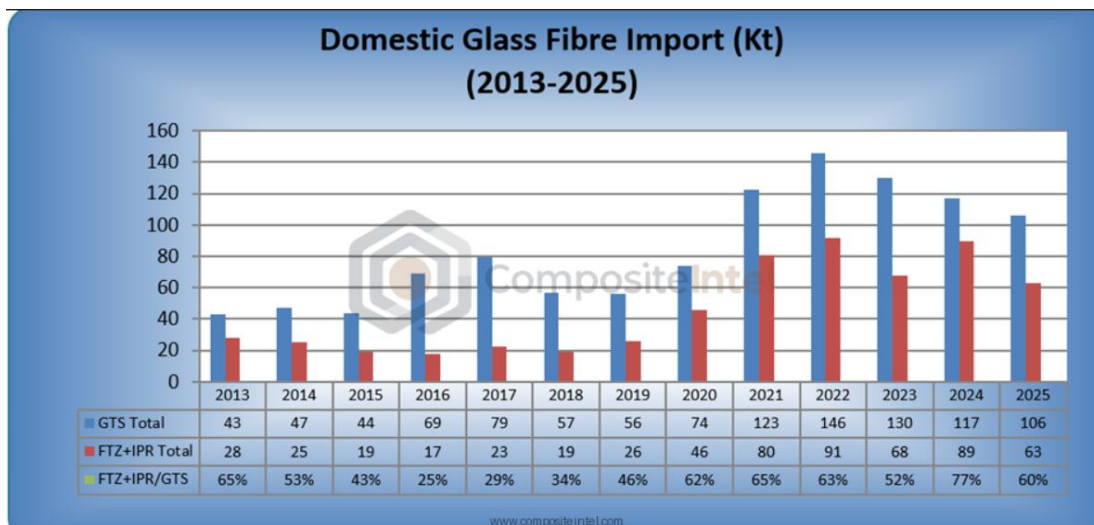
## Imports under the Inward Processing Regime and Free Zones

To better understand import dynamics, it is important to explain the conceptual difference between the Special Trade System (STS) and the General Trade System (GTS). STS imports include only goods entering free circulation within the customs territory. In contrast, GTS data provide a broader perspective by including free zones and bonded warehouses, resulting in a higher overall import volume.

Updated 2025 import figures based on both STS and GTS for main glass fiber product groups are presented below.



Source: TURKSTAT



Source: TURKSTAT

Recent data indicate that imports under Free Trade Zones and the Inward Processing Regime (IPR) account for a significant share of total imports within the GTS framework.

## Strategic Assessment and Future Outlook

From a strategic perspective, manufacturers must first define their identity—based on their resources, technological capabilities, R&D competencies, and target customer base—and then decide whether to pursue a “**volume-driven strategy**” or a “**value-driven strategy.**” Attempting to position oneself based on future aspirations rather than current capabilities may lead to ineffective strategic decisions.

A **volume-driven strategy** focuses on high sales volumes with lower margins. The objective is to leverage economies of scale to reduce unit costs and dominate market share. Products are typically standardized, and pricing is largely determined by supply-demand dynamics.

In contrast, a **value-driven strategy** emphasizes maximizing value per unit. Products are high-quality and high value-added, and profitability is driven by pricing power rather than scale. This approach targets niche and premium markets.

## Application Areas by Strategy

### Volume-driven segments:

- Commodity products such as standard mats, SMC, spray-up applications, sheets, and multi-end rovings
- Off-spec or recycled chopped fibers for thermoplastic applications
- GRP pipe systems and pultruded structural profiles
- Chopped strands (4.5 mm) for short-fiber thermoplastics (PA, PP, PBT)
- Multiaxial fabrics and engineered kits (in volume-oriented applications)

### Value-driven segments:

- Chopped strands for high-performance thermoplastics (PEEK, POM, PPA, ABS)
- Glass Fiber Reinforced Concrete (GFRC)
- Thermoplastic prepregs
- Milled fibers
- Long Fiber Thermoplastic (LFT) applications
- Thermoplastic hybrid structures (organosheets + injection molding)



- Yarn for woven fabrics, prepregs, and PCB laminates (CCL) — particularly fiber filament diameters (4–7 microns)
- High modulus (H-glass) multiaxial fabrics for wind turbine blades
- S-glass for defense and aerospace applications

Notably, imports of these higher value-added product groups have been increasing.

### **Ecosystem Requirements for New Investments**

For sustainable domestic investments, the following factors are critical:

- Availability of key raw materials domestically
- Government incentives and support mechanisms
- Reduced regional risks
- Competitive logistics and transportation advantages
- Access to know-how and technology transfer
- Automation and cost optimization

### **About the Author**

Çağrı Yurddaş is a seasoned professional with over 25 years of experience in the glass fiber and composites industry. During his career at Şişecam, he held roles in sales, market analysis, product management, and strategic evaluation, gaining deep expertise in the development of the Turkish glass fiber market and its foreign trade dynamics. He has represented Türkiye within the European Glass Fibre Producers Association and has played an active role in anti-dumping processes and sectoral data analysis.

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

For a brief preliminary consultation, you may contact me.

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