

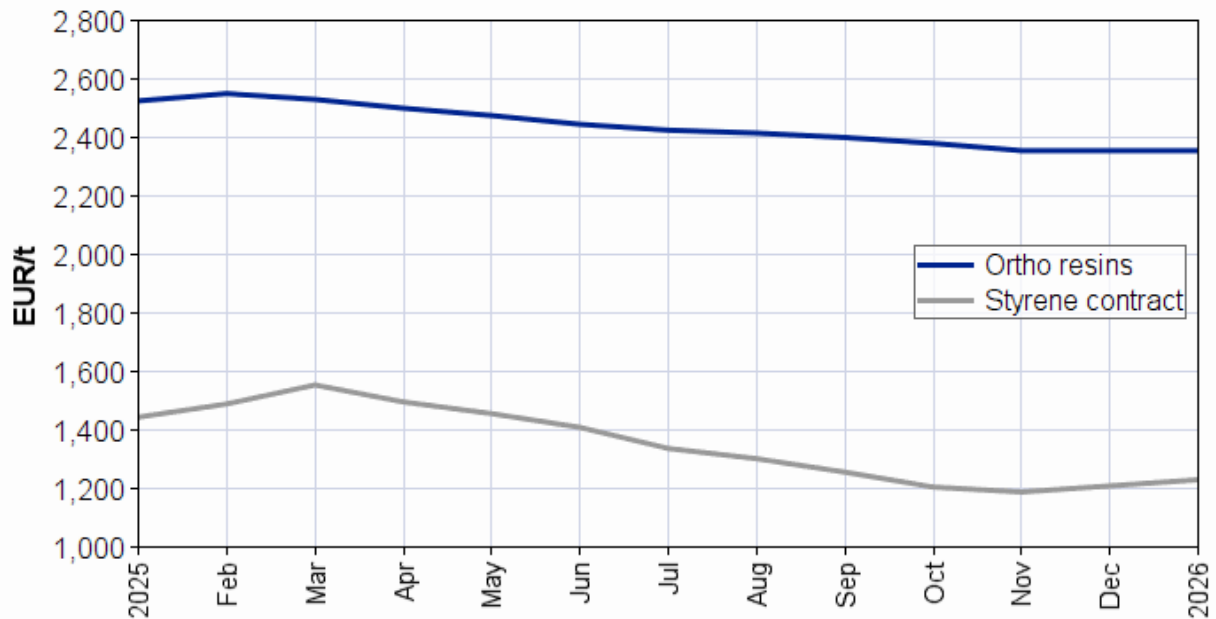
Composites/GRP January: Weak demand and a reasonably well-supplied market / No stock replenishment trends evident / Rollover likely in February

The new year started in the same way as the old one ended, with weak demand encountering increased styrene costs. Market participants generally agreed to leave prices unchanged for contract transactions. The supply situation was still more than adequate, largely as a result of the subdued demand. As neither the automotive industry nor the E&E and construction segments got off to a flying start in January, demand stayed at rock bottom. Stock replenishment effects were only evident in very rare cases – and then only on the basis of special deals. All in all, demand was at the lower end of what is considered normal for January.

For February, the styrene contract has risen sharply by EUR 120/t. Producers will not want to – or be able to – absorb this price increase on their own. Price adjustments therefore seem highly likely for ortho resins. Potential restocking trends could also keep prices up. However, as increased volumes of low-priced imports are expected once again, prices are likely to tend towards another rollover. Order activity in February is also anticipated to remain in a period of adjustment.

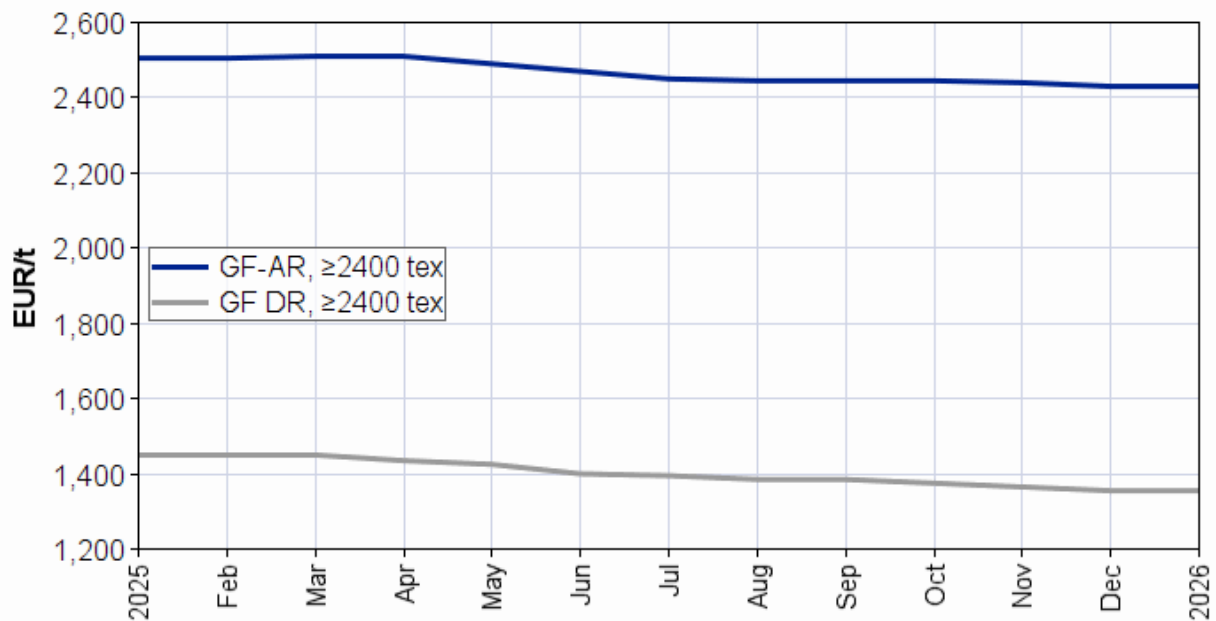
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Ortho Resins and Styrene 2025–2026, average prices in Europe



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Glass Fibres: Assembled Roving and Direct Roving 2025–2026, average prices in Europe



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