

Composites/GRP November 2025: Falling feedstock prices, weak demand weigh on resin prices / Glass fibres also slightly cheaper

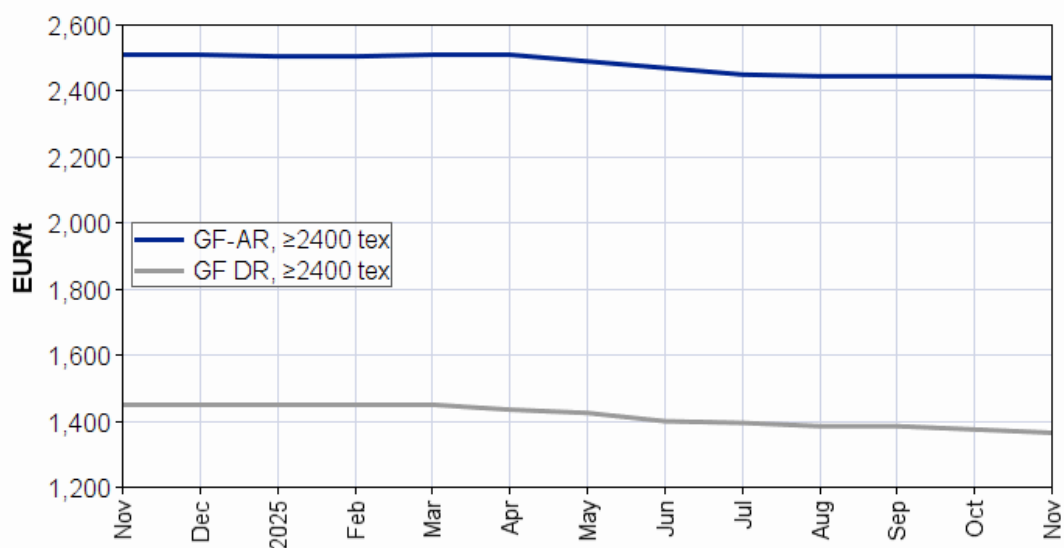
The typically sluggish response of orthophthalic resins to changes in feedstock costs was barely evident in November. The EUR 17/t drop in the styrene reference for the month was even exceeded, and falling prices for the other two key feedstocks – maleic and phthalic anhydride – added further downward pressure.

Although demand picked up slightly over the course of November, it remained well below expectations overall. The passenger car segment provided hardly any meaningful impetus, while the commercial vehicle sector proved somewhat more stable. By the end of the month, the year-end slowdown was already becoming apparent – earlier than in previous years.

Despite the EUR 21/t price increase for styrene monomer, demand is still weak and a slight correction in prices can also be expected in December.

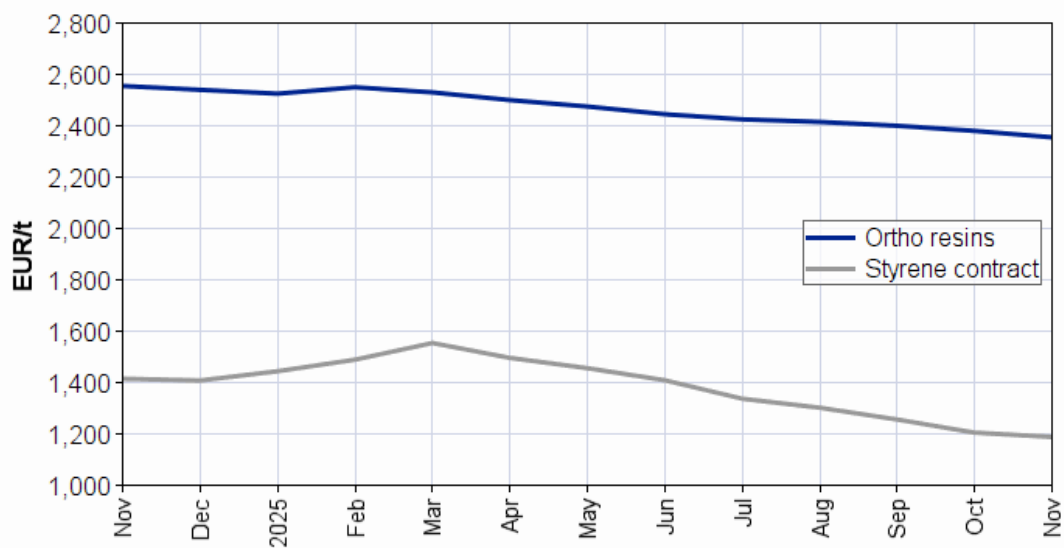
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Glass Fibres: Assembled Roving and Direct Roving 2024 - 2025, average prices in Europe



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Ortho Resins and Styrene 2024 - 2025, average prices in Europe



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