

P R E S S R E L E A S E

March 2026 | No. 03/2026

The European Composites Market in 2025 – Market developments, trends, challenges, and outlook

Downward trend in composites production in Europe slows / Positive forecast and rising demand

The challenges for the European composites industry remain: Even in 2025, the fundamental negative trend has not been halted. The causes are continuing macroeconomic weakness in many regions and, in particular, the situation of industrial production in key areas of application. However, the slight decline in European composites production is significantly lower than was forecast in mid-2025. Overall, production volume in Europe is declining by 3%.

The reason for a generally more optimistic view of the overall situation than in previous years is a positive trend in demand for composite components. It is disadvantageous for European manufacturers and producers that this demand is increasingly being met by non-European suppliers, both in terms of raw materials and products.

In addition to the already rather optimistic assessment of demand, there are also numerous opportunities and possibilities for the use of composites. The basic properties of the materials continue to favor the use of corresponding products in areas with challenging environmental influences, lightweight construction, and product optimization. Sustainability assessments are also increasingly coming into focus. Composites show great potential here – not only for substituting existing material solutions, but also for developing new, innovative products.

The AVK's Market Report for Fiber-Reinforced Plastics/Composites 2025 highlights developments, trends, and challenges and looks to the future. The complete Market Report 2025 is available on our website at <https://www.avk-tv.de/publikationen-2/>. This press release is a summary of the report.

The market under review

This market report analyzes all materials with a thermosetting matrix in the field of glass fiber reinforced plastics (GRP). NCF (non-crimp fabrics) are reported separately. The thermoplastics market covers long fiber-reinforced thermoplastics (LFT), glass mat-reinforced thermoplastics (GMT), and continuous fiber-reinforced thermoplastics (CFRTP). The European production volume for short glass fiber reinforced thermoplastics, natural fiber reinforced plastics (NFK), and carbon fiber reinforced plastics (CFK) are aggregated and reported separately.

Overall development of the composites market

According to current estimates by the JEC, the volume of the global composites market in 2025 was between 13.3 and 15.9 million tons. The reason for the wide variance is a division of expectations according to a "lower case" and "upper case" estimate. Global market growth of around 1% is expected.

In comparison, European composites production volume declined by 3% in 2025. The total European composites market will thus comprise a volume of 2,281 kilotons (kt) after 2,351 kt in 2024 (see Fig. 1). The market will therefore continue to decline, falling even further behind the years of the coronavirus pandemic.

Overall, market momentum in Europe was weaker than in the global market. Europe's share of the global market is 17% in the lower case scenario and 14% in the upper case scenario.

Market shares are thus continuing to shift in favor of America and Asia. As in previous years, development within Europe is not uniform. The differences can be attributed to regionally very different core markets, the high variability of the materials processed, a wide range of different manufacturing processes, and widely varying areas of application.

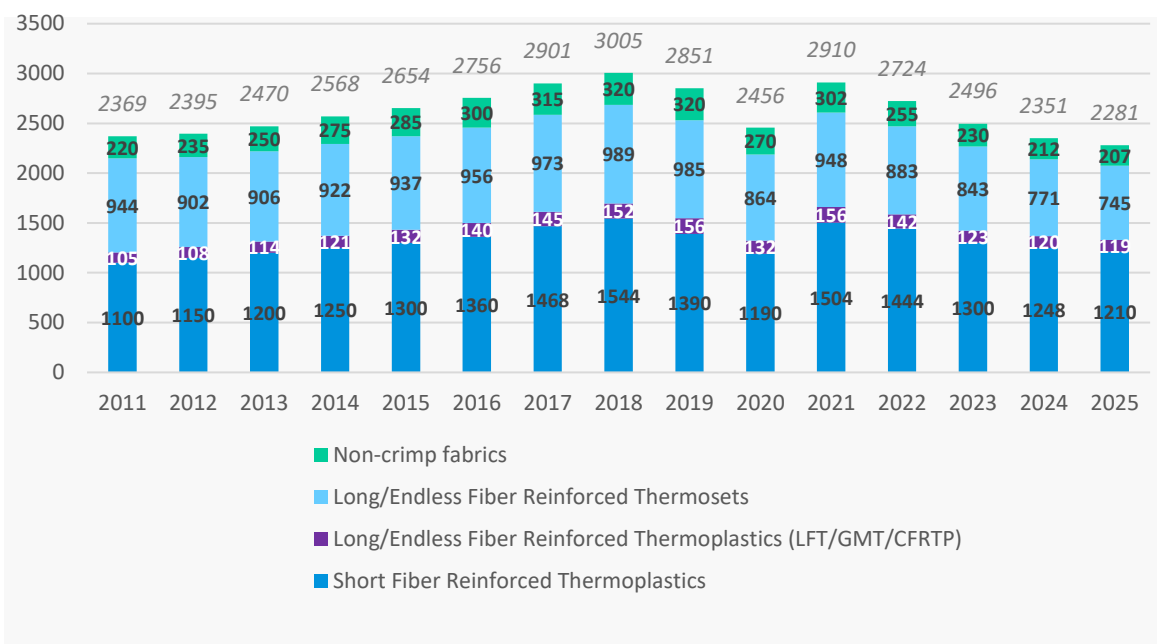


Figure 1: Composites production volume in Europe since 2011 (in kt)

In terms of volume, the largest share of total composites production goes to the transportation sector, which accounts for almost 50% of the market volume (see Fig. 2). Other major areas are the electrical/electronics sector and applications in infrastructure and construction.

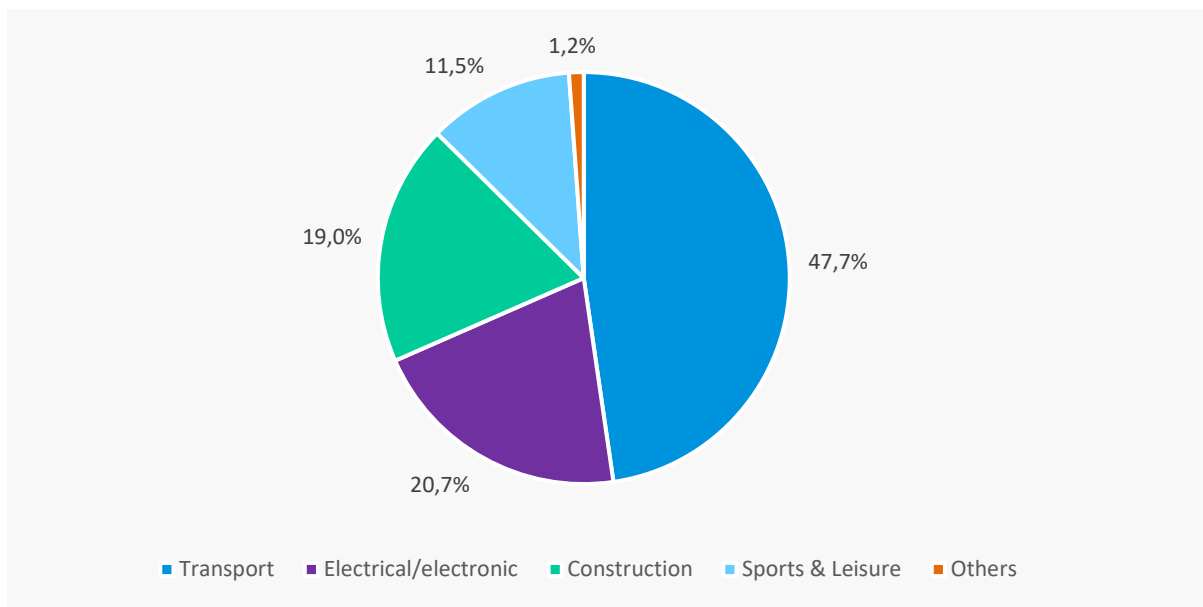


Figure 2: Total composites market by application area in 2025 (in %)

Development of the market for thermosetting composites

The total production volume of thermoset composites in 2025 was 952 kt, down from 983 kt in the previous year. This means that this material group accounted for 41.7% of the total market in Europe.

Compared to the long-term trend, there has been a slowdown in the shift from thermoset to thermoplastic materials. This is due to the high dependence of thermoplastics on the automotive industry. Currently, more than 60% of the materials used are in the transportation sector.

The two main areas of application for thermoset composites remain construction/infrastructure and transportation (see Fig. 3). Compared to the previous year, declines are expected in the transportation and electrical/electronic sectors in 2025.

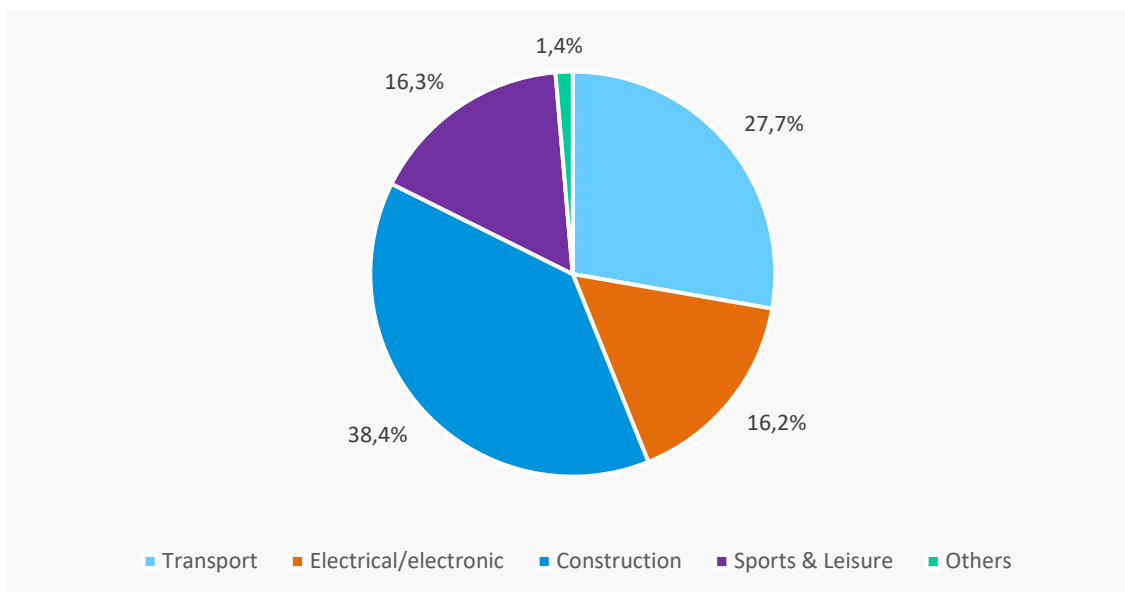


Figure 3: Thermoset composites by area of application in 2025 (in %)

Development of the market for thermoplastic composites

The market for thermoplastic composites in Europe had a total volume of 1,329 kt in 2025, down from 1,368 kt in the previous year.

The market share of these systems in the overall European market rose to 58.3% after 58.2% in 2024. Compared to the previous year, the market volume fell by 2.9%, which is roughly the same as the overall market.

The main area of application for thermoplastic composites is the transportation sector, which accounts for almost two-thirds of the market. Within this segment, the passenger car and commercial vehicle sectors dominate. Together with electrical/electronic applications, this results in a market share of 86% for 2025 (see Fig. 4).

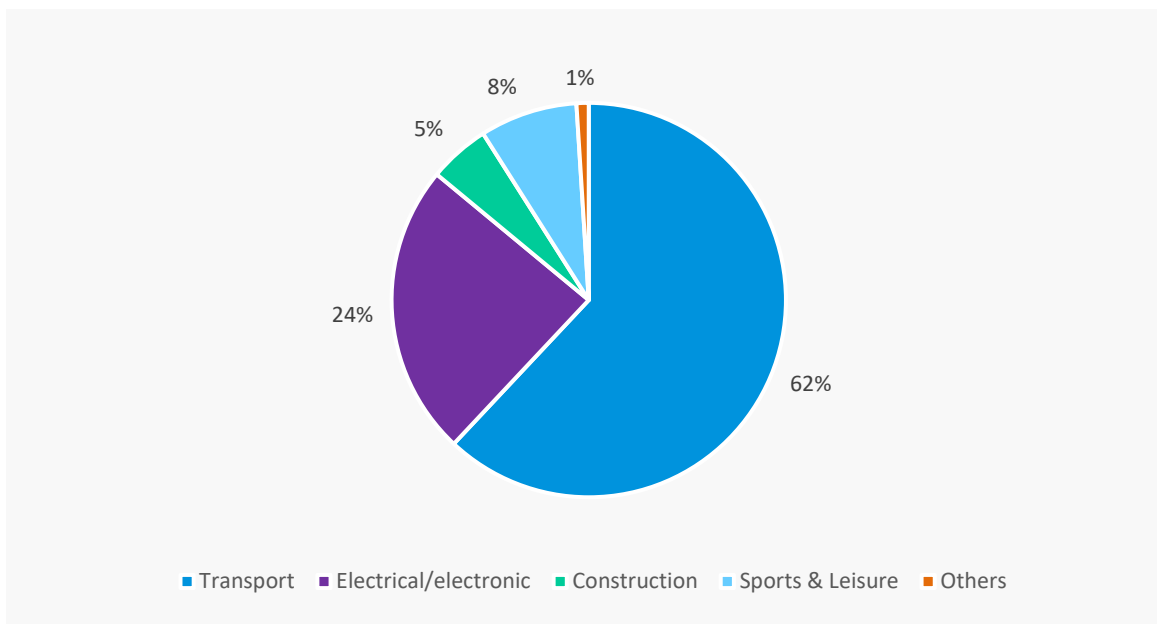


Figure 4: Thermoplastic composites by application area in 2025 (in %)

The passenger car market is of central importance for thermoplastic composites. While the automotive industry often spoke of economic weakness in the first two years after the coronavirus pandemic, 2025 will reveal the full extent of the structural problems facing the European and, above all, German automotive industry. This development is becoming an increasing problem for European manufacturers of composite components and the supplier industry.

A car that is not manufactured in Europe does not need European components. The figures illustrate the challenging market environment facing the transport sector, and the automotive sector in particular.

GRP market: Trends in processes/parts

As in the previous year, all segments covered in detail in the market report were affected by absolute declines in production volume (see Fig. 4). SMC/BMC was the largest single segment in the European GRP market (all thermosetting and long and continuous fiber-reinforced thermoplastic materials). These are often used in large-scale series applications in the electrical/electronic and transportation sectors, but also in the construction and infrastructure sectors.

Non-crimp fabrics (fabrics) formed the second-largest group. The so-called open mold processes followed in third place. In terms of volume, the other processes mentioned here were at a similar level.

The AVK market report examines and analyzes the individual material groups and processes in detail.

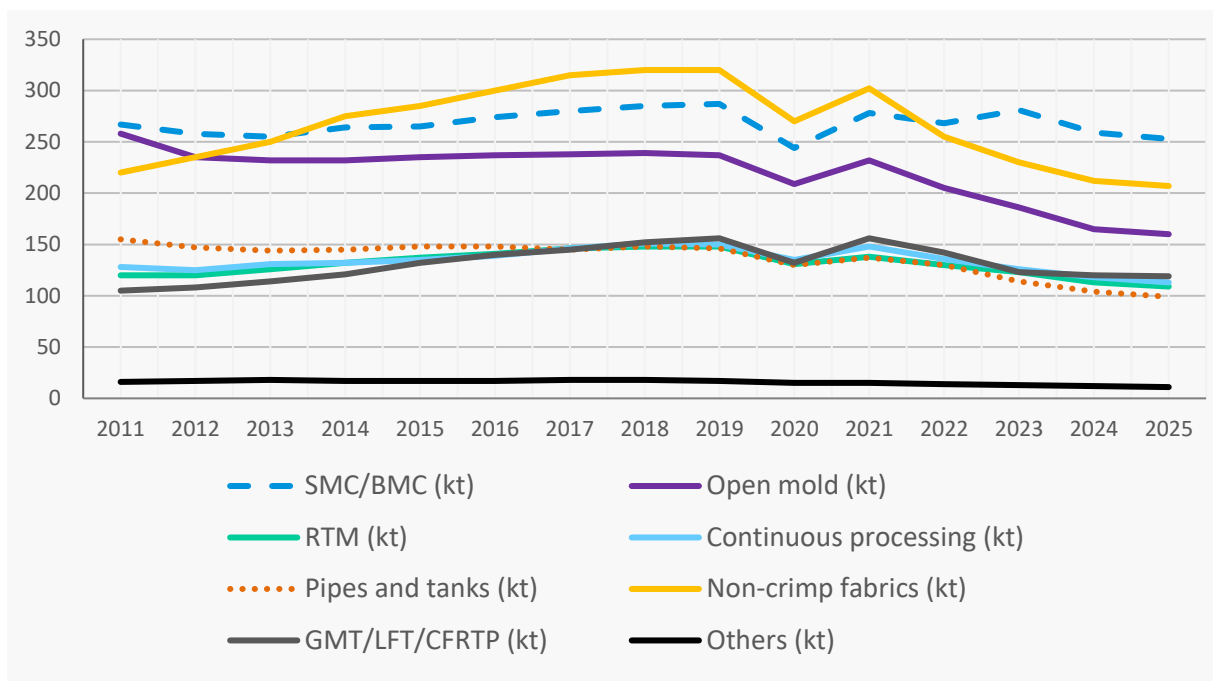


Figure 5: Long-term development of selected composites market segments (in kt)

Regional market development

The percentage shifts according to regional focus areas in 2025 compared to 2024 have again only changed in the decimal range. Overall, there were absolute declines in all regions covered. The German thermoset market reached a volume of 180 kt in 2025 (2024 = 187 kt), which corresponds to a share of 18.9% of the total market. Germany thus lost a small amount of market share but remained the largest manufacturer of composites in Europe. The declines are primarily attributable to the high dependence on the automotive market.

Although the Eastern European countries were larger than Germany for the first time, with a market share of 19.1% and an absolute volume of 182 kt, they comprise a region consisting of Poland, Czechia, Hungary, Romania, Serbia, Croatia, Macedonia, Latvia, Lithuania, Slovakia, and Slovenia.


With a processing volume of 141 kt (2024 = 143 kt), Spain/Portugal formed the third-largest group. Italy was just behind Spain/Portugal, with a market share of 14.1% and a composites processing volume of 134 kt (2024 = 140 kt). The four regions mentioned accounted for more than two-thirds of the European composites market. The next largest processing region was the UK/Ireland with a market share of 13.9% and a volume of 132 kt. France lagged significantly behind with a market share of 10.4% and an associated production volume of 99 kt.

The remaining three, rather smaller, processing regions were led by the Benelux countries with a share of 3.6%. The volume in the northern European countries (Denmark, Sweden, Norway, and Finland) was only slightly lower in 2025.

Austria/Switzerland accounted for the smallest share in percentage terms and thus also in terms of volume. The composites industry has very different focal points in almost all regions. Accordingly, the various countries/regions are often affected very differently by overall economic developments. A pan-European view can therefore only ever provide a rough indication of developments or point to fundamental trends.

The complete 2025 market report, including commentary, can be found on our website at <https://www.avk-tv.de/publikationen-2/>.

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About the AVK

AVK – Industrievereinigung Verstärkte Kunststoffe e.V. (Federation of Reinforced Plastics) is the German trade association for fiber-reinforced plastics/composites and represents the interests of manufacturers and processors at national and European level.

Its range of services includes specialist working groups, seminars, and conferences, as well as the provision of market-relevant information (www.avk-tv.de/).

Nationally, the AVK is one of the five supporting associations of the GKV (German Association of the Plastics Converters) and internationally a member of the European Composites Industry Association (EuCIA).

The AVK is a founding member of Composites Germany.