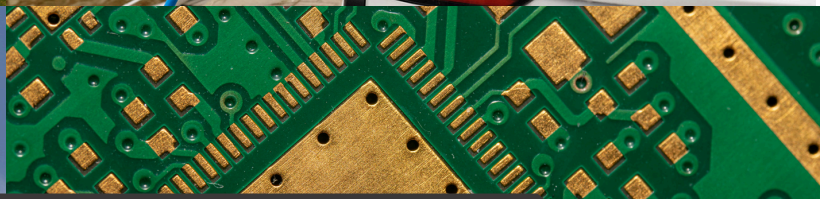


A composite supply chain for Europe

Building strategic autonomy through resilient & innovative materials

What are composites?

Composites are fibre-reinforced polymers, including thermoset and thermoplastic resins, reinforced with various fibres such as glass, carbon, aramid, and natural fibres. These durable engineered materials offer high mechanical strength, excellent chemical and heat resistance, and exceptional design flexibility.

Thanks to their versatility and advanced material properties, composites **provide high-performance alternatives to traditional materials**. The European composites supply chain is at the forefront of industry innovation, continuously developing **new applications and enabling the emergence of new sectors**.

Why composites matter for Europe?

Composites are **essential to the twin transitions** toward a **decarbonised and digital economy**. They enable lightweighting, energy efficiency, and sustainability across key industries such as **construction & infrastructure, transport, aerospace & defence, renewable energy generation and transmission, and electrical & electronics sectors**.

Composites are also vital components in **Net-Zero Technology.** This includes renewable energy, battery and energy storage, heat pumps, hydrogen, sustainable biogas, carbon capture and storage, and electricity grids.

Did you know?

- Wind turbine blades are made of 60-70% glass fibre and 30-40% resin.
- Printed circuit boards in computers & electronics are made from composite materials.
- The Eurofighter Typhoon has 40% composite share.

In numbers[1]

2.5 million tons – EU composite market

€10 billion – EU market

200,000 – EU employees

Keeping Europe competitive in the composites race

The composites supply chain is a key driver of the EU's green and digital transitions, supporting jobs, economic growth, and innovation in a fast-growing global market. However, high operating and regulatory costs, unfair international competition, and limited domestic demand have undermined competitiveness, shrinking the EU's global market share of the global composites' market from **21% in 2019 to 18% in 2024**.[1]

Epoxy Europe, represents the interests of the major European epoxy resins manufacturers since the early 1980s. www.epoxy-europe.eu. The **UPR/VE Resin Association**, represents unsaturated polyester (UPR) and Vinyl Ester (VE) resins producers of Europe. www.upresins.org. Both are sector groups of Cefic, the European Chemical Industry Council (EU transparency Register n° 64879/42323-90)

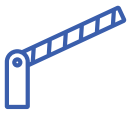
Glass Fibre Europe, founded in 1987, is the voice of the European continuous filament glass fibre industry www.glassfibreeurope.eu

The **European Composites Industry Association (EuCIA)** represents European national composites associations and industry-specific sector groups at EU level www.eucia.eu

Challenges to address now

A level playing field for EU manufacturers is essential

the composite supply chain is facing increasing pressure from unfair trade practices and market distortions that harm the industry. The EU must effectively tackle these issues by using its trade defence instruments (TDIs).[2]



Customs controls need to be strengthened

to ensure that the import of materials that fail to meet EU regulatory requirements – particularly those related to REACH regulation, sustainability, safety and social standards do not enter the single market. Without effective enforcement, EU producers face unfair disadvantages due to higher compliance costs compared to non-EU regions.[3]

The circularity and recyclability of composites must be fully recognised

in end-of-life legislation (e.g. the End-of-Life Vehicles Regulation). Supportive measures include facilitation of trans-border shipment of composites wastes within the EU, support for scaling up recycling technologies, market incentives for recycled content from EU-sourced secondary materials and equivalent feedstock from trusted trade partners, legal clarity on chemical recycling, the adoption of the mass balance approach, and recognition of cement co-processing as open-loop recycling.

Addressing high energy costs is also a critical priority

EU industry urgently needs access to abundant and affordable low-carbon energy sources such as renewable electricity, green hydrogen, and decarbonised fuels. Massive investment is needed to modernise and expand energy grids and infrastructure across Europe.

The ongoing EU ETS reform

must offer predictable and robust carbon leakage protection for energy-intensive sectors exposed to international competition.

The market uptake of European-made low-carbon products

should be supported with the consideration of measures such as an “EU origin” certification for different steps in the value chain, and policies that favour local content e.g. in public procurement and in sectors critical for EU strategic autonomy.

Chemical regulation must be proportionate, and outcome focused

regulatory approaches should focus on delivering the intended results – environmental and health protection – without creating unnecessary complexity that stifles innovation or hinders sustainable industrial development.

References

1 JEC Observer 2024, Estin & Co analysis and estimates
2 The European Commission is currently conducting trade investigations in the epoxy resins sector (AD711) and glass fibre sectors (AD728, R824 and R825)
3 European Chemicals Industry Action Plan, July 2025