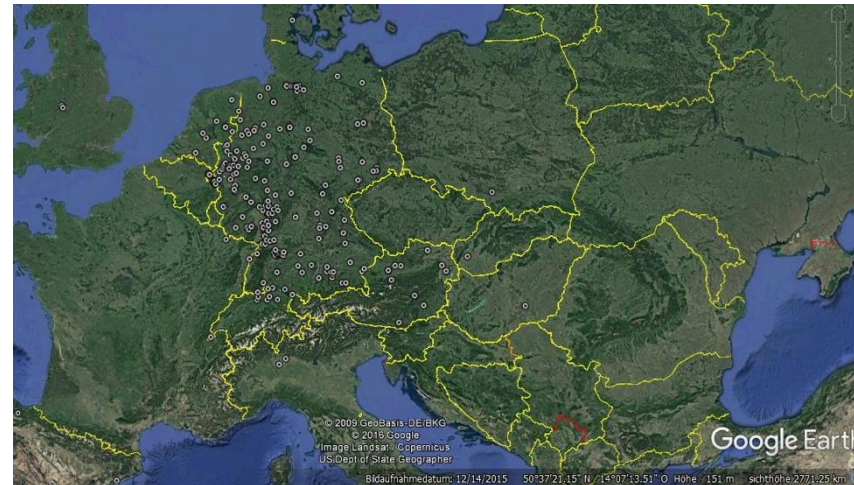


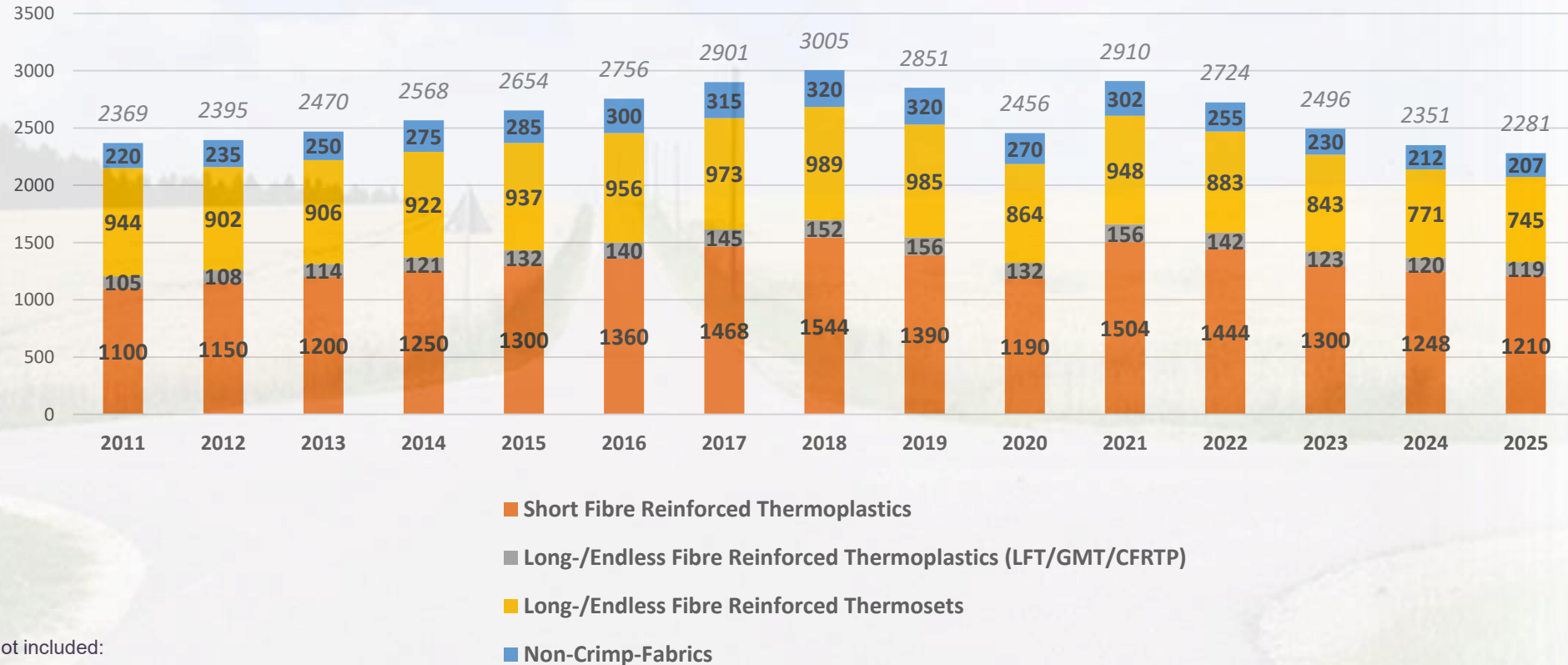
AVK - Our Organisation

- **Founded in 1924**
- **Members across the entire value chain of reinforced plastics**
- **More than 220 (inter)national member companies (1/4 non German)**
- **> 1700 personal contacts inside the companies**
- **„Full service provider for our members“**



European Composites Industry - The initial situation

➤ The European (composites) industry is at a crossroads



* Not included:

CRP & Natural Fibre Reinforced
Plastics

The initial situation

- **Challenges vs. Chances**
- **High dependence on macroeconomic influences**
- **Overall economic (esp. Industrial weakness)**
- **Currently, increasingly rapid market dynamics with many uncertainties**
- **High/increasing international competitive pressure**
- **Core markets (automotive, construction/infrastructure) with weak development/underperformance**
- **...**

European Composites Market – Trends

➤ Challenges & Chances

- **The European (composites) industry is at a crossroads**
- ~~High dependence on macroeconomic influences~~
- ~~Overall economic (esp. industrial weakness)~~
- ~~Currently, increasingly rapid market dynamics with many uncertainties~~
- ~~High/increasing international competitive pressure~~
- ~~Core markets (automotive, construction/infrastructure) with weak development~~
- **Future opportunities & challenges?**
 - **Sustainability as a key issue?**
 - **Renewable energies = growth drivers?**
 - **Innovation vs. price war**
 - **Process optimization & digitalization**
 - **Government spending programs**
 - ...

Let's actively shape the future

Composites in Europe

Can the (composites) industry in Europe still be saved, or are we already at the end of the road?

It's time to take action - actively!

Sustainability, R&D, and process innovations are our opportunity to overcome the current price war and the shift of manufacturing overseas!