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Profile of SGL Carbon Fibers and Composites

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Abstracts

SGL Group is a specialist in carbon fibres and composites based in Germany with sales in 2009 of Euro1,226 mn (US$1,708 mn). The company's operations are grouped into three business areas, namely Performance Products (PP), Graphite Materials & Systems (GMS), and Carbon Fibers and Composites (CFC). The CFC unit—which is in turn divided into Carbon Fibers and Composite Materials, and Composite Components—accounted for 17% of total group sales in 2009.

In the past few years, SGL Group has taken steps to strengthen its position in the aerospace, wind energy and automotive sectors by acquiring a majority stake in Abeking & Rasmussen Rotec and forming partnerships with Denel Saab Aerostructures, Bard Emden Energy, Benteler, and BMW. Also, its acquisition of Abeking & Rasmussen Rotec has forward-integrated the group into rotor blade production, and established it as the sole European manufacturer of integrated carbon fibres and composites for the wind energy sector.

In fibres, the group is on course to take advantage of the growing substitution of basic materials such as steel and aluminium with components made from carbon fibre by doubling its carbon fibre production capacity by 2012. Its carbon fibres are sold under various brand names. Panox is an oxidised, thermally stabilised polyacrylonitrile (PAN) flame resistant fibre. Sigrafil C is a heavy tow carbon fibre derived from a polyacrylonitrile (PAN) precursor. And Sigrafil T is a partially carbonised polyacrylonitrile (PAN) fibre which is used as an asbestos replacement. The company also sells textiles under various brand names, including Sigratex woven fabrics and tapes, unidirectional reinforcement materials, multiaxial fabrics and nonwovens, and Udo unidirectional and multiaxial reinforcement materials.

In 2009 SGL Group registered its first net loss since 2003 as temporary surplus capacity in the carbon fibre market put pressure on prices and margins and made it impossible

for it to achieve its sales targets. The excess capacity was caused partly by delays in major projects in the aerospace and wind energy sectors as a result of the global financial crisis. Looking ahead, the CFC business requires a lot of investment and it is likely to be some time until demand returns to pre-crisis levels. However, it continued in 2009 to secure additional orders and turned a loss in the previous year into an operating profit. Bearing in mind the growth expected in wind energy and the growing use of carbon fibre components in the aerospace and automotive sectors, the long-term prospects for this business remain positive.

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