

The ELCAinternationalization project: the document summarizing lightweight opportunities and partnership competences is now available!

We are a member of **ELCA – European Lightweight Cluster Alliance** - a 2-year project funded under the “COSME” Programme. The aim of the project is to **prepare an international marketing strategy** by a consortium created by five European industry clusters, establish cooperation between member companies of all clusters, **prepare a joint offer and establish contacts** with automotive, aero&aeronautics, railway and maritime concerns and also to **promote European solutions in the field of light structures in transport**, which aims at the reduction of CO2 emission and increase recycling, and thus fits into the concept of the circular economy.

We can now share the **first report summarizing lightweight opportunities and partnership competences**. It is worth reading it in full, but below is a short summary of the first part of this report.

Worldwide, industry is looking for materials with a higher strength-to-weight ratio which reduces weight, while improving performance. The ELCA action seeks to foster the use of European lightweight products, technologies and services in four mobilities sectors: **aerospace & aeronautics, automotive, rail and maritime** outside of the European borders. However, there have been difficulties to find information on the lightweight market for the maritime sector and the consortium competences and knowledge on this sector being limited we have decided to focus on the three other mobility sectors.

The main aim of our first task was to **prepare the ground** for developing the rest of activities in a successful manner, by **identifying the lightweight opportunities in different mature & less mature markets**.

For analysing market opportunities, first we are going to focus on **aerospace & aeronautics market**. The matured market that we have focused on: Japan and US, are very advanced on other countries. These two countries are looking to continually modernize their industry. The US is a leader in the aviation industry and it's a very competitive market. Japan is a world leader in carbon fiber production and have many clusters.

On the less mature markets, the Indian aerospace composites market is expected to see significant growth opportunities in both local and export market developing in the years to come. For Latin American region, Brazil is the best positioned, Mexico is making steady progress. Moreover, Chile is not a highly developed aerospace market, but the country holds the largest aerospace fair in Latin America, which is well positioned and there are already foundations to promote this sector. On the other hand, the rest of the Latin American country, do not have a highly developed aeronautical sector. For Middle East, there is little information on the lightweight market.

For the automobile sector, the Asia Pacific and North America lightweight materials market were the largest in 2015 and are forecast to remain the leaders in 2026. Japan and the USA are among the most important players in their region in this sector but both markets are really competitive. Then, India is a fast-growing market but it less mature than Japan and USA motivated by innovation-price sensitive. On the other hand, Brazil is a consolidated market with few players and also a dominant market of carbon and glass fibers composites.

Regarding the Rail sector, American and Japanese market are extremely competitive with a limited number of global players. It's the same for India that is a more mature market than we



expected. The Brazilian rail sector is developing right now. New lightweight materials and technologies will then be more and more in demand and it could be an opportunity for our European brand to flourish in this region. For Middle East, there is little information on the lightweight market apart from Qatar and Saudi Arabia having seemingly many projects coming in this field.

The full document is available on the official ELCA website: [Deliverable 1.1](#). The second part of the summary of the report will be available soon.

We encourage you to read it and check the first project conclusions. We are proud to be a member of this project!

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