

# Global Carbon Fiber for Aerospace and Military Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Carbon Fiber for Aerospace and Military competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, global Carbon Fiber for Aerospace and Military production reached 38,703 tons, with an average global market price of around US\$ 80 per kg. Carbon fiber for aerospace and military applications refers to high-performance carbon fiber materials specifically developed for load-bearing, structural and thermal protection components in aircraft, spacecraft, missiles and defense systems. These materials offer extremely high specific strength and stiffness, excellent fatigue resistance, corrosion resistance and environmental durability, and are used to significantly reduce structural weight while enhancing payload capacity and system reliability. Carbon fiber for aerospace and military applications represents the highest-barrier and highest-value segment within the advanced composite materials industry. It is widely used in critical components such as fighter fuselages, missile shells, rocket structures, satellite antenna supports, and aircraft engine blades. With exceptional specific strength, stiffness, and fatigue resistance, it serves as a fundamental material enabling lightweight, stealthy, and highly maneuverable aircraft design. The global market has long been dominated by the United States and Japan, but in recent years, China and Russia have accelerated domestic development and application certification, driving the industry structure from a unipolar to a multipolar configuration where material security and supply autonomy are both strategic priorities. In terms of product structure, aerospace and military-grade carbon fibers mainly include high-strength types (T700/T800 series) and high-modulus types (M40/M55J series), with some advanced models extending to ultra-high-modulus grades (M60J and above) to meet diverse structural and mechanical requirements. PAN-based carbon fibers remain the

mainstream route, supplemented by limited volumes of pitch-based and phenolic-based fibers. The manufacturing process involves high-purity precursor production, stabilization, carbonization, graphitization, and surface sizing?each requiring precise control of temperature, tension, and atmosphere. Typical single-line production capacity ranges from 500 to 1,000 tons per year, reflecting a technology-intensive process chain with stringent quality assurance. From a cost and profitability perspective, the cost composition of aerospace-grade carbon fiber consists of approximately 35% PAN precursor, 30% energy and equipment depreciation, 15% labor and inspection, 10% sizing agents and auxiliary materials, and 10% management and quality control. The high-temperature carbonization and surface treatment stages are the major cost drivers. Due to the long certification cycle, strong customer loyalty, and stable supply relationships, gross profit margins typically remain in the 45%?55% range. Vertically integrated enterprises that combine precursor, carbonization, prepreg, and composite part production achieve higher efficiency and profitability, forming distinct competitive advantages. Across the industrial chain, the upstream segment includes acrylonitrile, DMF solvent, and high-performance PAN precursors; the midstream covers carbonization and surface modification; and the downstream extends to prepregs, composite structures, and final assembly applications. Customer concentration is extremely high?major demand is led by Boeing, Airbus, Lockheed Martin, China Aerospace Science and Technology Corporation (CASC), and AECC. International leaders such as Toray, Mitsubishi Chemical, and Hexcel retain technological dominance, while Chinese manufacturers like Guangwei Composites, Zhongfu Shenyang, and Hengshen Co. are rapidly advancing certification and integrated composite solutions, narrowing the global capability gap. The entire supply chain exhibits a ?high R&D investment ? high technical barrier ? high value-added? pyramid structure. Looking ahead, the aerospace and military carbon fiber industry will continue to evolve toward higher modulus, greater thermal stability, and multifunctional intelligent composite systems. Demand will expand with the progress of reusable launch vehicles, hypersonic weapons, and heavy-lift rocket programs. In parallel, innovations in digital manufacturing, intelligent inspection, low-energy carbonization, and recycling technologies will reshape production efficiency and sustainability. The global market will remain highly concentrated and entry-restricted, while China?s breakthroughs in key equipment, process software, and quality systems are expected to drive a shift from ?technology follower? to ?standards leader,? positioning it as one of the most dynamic forces in the future global aerospace carbon fiber landscape.

The global Carbon Fiber for Aerospace and Military market size was estimated at USD 3096.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.80% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Carbon Fiber for Aerospace and Military market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Carbon Fiber for Aerospace and Military market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Carbon Fiber for Aerospace and Military market.

## **Global Carbon Fiber for Aerospace and Military Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

## **Key Company**

Toray Industries, Inc.  
Hexcel  
Jilin Tangu Carbon Fiber Co., Ltd.  
Mitsubishi Chemical  
Teijin  
Hyosung Advanced Materials  
SGL Carbon  
Zhongfu Shenying Carbon Fiber Co.,Ltd.  
Weihai Guangwei Composites Co., Ltd.  
Aksa Carbon  
Jiangsu Hengshen Co.,Ltd.  
Sinofibers Technology Co., Ltd.  
Formosa Plastic Group  
Syensqo  
UMATEX  
Changsheng (Langfang) Technology Co., Ltd

### **Market Segmentation (by Type)**

Small-tow  
Large-tow

### **Market Segmentation (by Application)**

Commercial Aerospace  
Defense

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the Carbon Fiber for Aerospace and Military Market  
Overview of the regional outlook of the Carbon Fiber for Aerospace and Military Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Carbon Fiber for Aerospace and Military Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Carbon Fiber for Aerospace and Military, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of Carbon Fiber for Aerospace and Military
- 1.2 Key Market Segments
  - 1.2.1 Carbon Fiber for Aerospace and Military Segment by Type
  - 1.2.2 Carbon Fiber for Aerospace and Military Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global Carbon Fiber for Aerospace and Military Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global Carbon Fiber for Aerospace and Military Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global Carbon Fiber for Aerospace and Military Product Life Cycle
- 3.3 Global Carbon Fiber for Aerospace and Military Sales by Manufacturers (2020-2025)
- 3.4 Global Carbon Fiber for Aerospace and Military Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Carbon Fiber for Aerospace and Military Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Carbon Fiber for Aerospace and Military Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

- 3.8 Carbon Fiber for Aerospace and Military Market Competitive Situation and Trends
  - 3.8.1 Carbon Fiber for Aerospace and Military Market Concentration Rate
  - 3.8.2 Global 5 and 10 Largest Carbon Fiber for Aerospace and Military Players Market Share by Revenue
  - 3.8.3 Mergers & Acquisitions, Expansion

## **4 CARBON FIBER FOR AEROSPACE AND MILITARY INDUSTRY CHAIN ANALYSIS**

- 4.1 Carbon Fiber for Aerospace and Military Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF CARBON FIBER FOR AEROSPACE AND MILITARY MARKET**

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
  - 5.4.1 New Product Developments
  - 5.4.2 Mergers & Acquisitions
  - 5.4.3 Expansions
  - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
  - 5.5.1 Industry Policies Analysis
  - 5.5.2 Economic Environment Analysis
  - 5.5.3 Social Environment Analysis
  - 5.5.4 Technological Environment Analysis
- 5.6 Global Carbon Fiber for Aerospace and Military Market Porter's Five Forces Analysis
  - 5.6.1 Global Trade Frictions
  - 5.6.2 U.S. Tariff Policy ? April 2025
  - 5.6.3 Global Trade Frictions and Their Impacts to Carbon Fiber for Aerospace and Military Market
- 5.7 ESG Ratings of Leading Companies

## **6 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET SEGMENTATION**

## **BY TYPE**

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Carbon Fiber for Aerospace and Military Sales Market Share by Type (2020-2025)
- 6.3 Global Carbon Fiber for Aerospace and Military Market Size by Type (2020-2025)
- 6.4 Global Carbon Fiber for Aerospace and Military Price by Type (2020-2025)

## **7 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET SEGMENTATION BY APPLICATION**

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Carbon Fiber for Aerospace and Military Market Sales by Application (2020-2025)
- 7.3 Global Carbon Fiber for Aerospace and Military Market Size (M USD) by Application (2020-2025)
- 7.4 Global Carbon Fiber for Aerospace and Military Sales Growth Rate by Application (2020-2025)

## **8 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET SALES BY REGION**

- 8.1 Global Carbon Fiber for Aerospace and Military Sales by Region
  - 8.1.1 Global Carbon Fiber for Aerospace and Military Sales by Region
  - 8.1.2 Global Carbon Fiber for Aerospace and Military Sales Market Share by Region
- 8.2 Global Carbon Fiber for Aerospace and Military Market Size by Region
  - 8.2.1 Global Carbon Fiber for Aerospace and Military Market Size by Region
  - 8.2.2 Global Carbon Fiber for Aerospace and Military Market Size by Region
- 8.3 North America
  - 8.3.1 North America Carbon Fiber for Aerospace and Military Sales by Country
  - 8.3.2 North America Carbon Fiber for Aerospace and Military Market Size by Country
  - 8.3.3 U.S. Market Overview
  - 8.3.4 Canada Market Overview
  - 8.3.5 Mexico Market Overview
- 8.4 Europe
  - 8.4.1 Europe Carbon Fiber for Aerospace and Military Sales by Country
  - 8.4.2 Europe Carbon Fiber for Aerospace and Military Market Size by Country
  - 8.4.3 Germany Market Overview
  - 8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Carbon Fiber for Aerospace and Military Sales by Region

8.5.2 Asia Pacific Carbon Fiber for Aerospace and Military Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

8.5.5 South Korea Market Overview

8.5.6 India Market Overview

8.5.7 Southeast Asia Market Overview

8.6 South America

8.6.1 South America Carbon Fiber for Aerospace and Military Sales by Country

8.6.2 South America Carbon Fiber for Aerospace and Military Market Size by Country

8.6.3 Brazil Market Overview

8.6.4 Argentina Market Overview

8.6.5 Columbia Market Overview

8.7 Middle East and Africa

8.7.1 Middle East and Africa Carbon Fiber for Aerospace and Military Sales by Region

8.7.2 Middle East and Africa Carbon Fiber for Aerospace and Military Market Size by Region

8.7.3 Saudi Arabia Market Overview

8.7.4 UAE Market Overview

8.7.5 Egypt Market Overview

8.7.6 Nigeria Market Overview

8.7.7 South Africa Market Overview

## **9 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET PRODUCTION BY REGION**

9.1 Global Production of Carbon Fiber for Aerospace and Military by Region(2020-2025)

9.2 Global Carbon Fiber for Aerospace and Military Revenue Market Share by Region (2020-2025)

9.3 Global Carbon Fiber for Aerospace and Military Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America Carbon Fiber for Aerospace and Military Production

9.4.1 North America Carbon Fiber for Aerospace and Military Production Growth Rate (2020-2025)

9.4.2 North America Carbon Fiber for Aerospace and Military Production, Revenue,

## Price and Gross Margin (2020-2025)

### 9.5 Europe Carbon Fiber for Aerospace and Military Production

#### 9.5.1 Europe Carbon Fiber for Aerospace and Military Production Growth Rate (2020-2025)

#### 9.5.2 Europe Carbon Fiber for Aerospace and Military Production, Revenue, Price and Gross Margin (2020-2025)

### 9.6 Japan Carbon Fiber for Aerospace and Military Production (2020-2025)

#### 9.6.1 Japan Carbon Fiber for Aerospace and Military Production Growth Rate (2020-2025)

#### 9.6.2 Japan Carbon Fiber for Aerospace and Military Production, Revenue, Price and Gross Margin (2020-2025)

### 9.7 China Carbon Fiber for Aerospace and Military Production (2020-2025)

#### 9.7.1 China Carbon Fiber for Aerospace and Military Production Growth Rate (2020-2025)

#### 9.7.2 China Carbon Fiber for Aerospace and Military Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

### 10.1 Toray Industries, Inc.

#### 10.1.1 Toray Industries, Inc. Basic Information

#### 10.1.2 Toray Industries, Inc. Carbon Fiber for Aerospace and Military Product Overview

#### 10.1.3 Toray Industries, Inc. Carbon Fiber for Aerospace and Military Product Market Performance

#### 10.1.4 Toray Industries, Inc. Business Overview

#### 10.1.5 Toray Industries, Inc. SWOT Analysis

#### 10.1.6 Toray Industries, Inc. Recent Developments

### 10.2 Hexcel

#### 10.2.1 Hexcel Basic Information

#### 10.2.2 Hexcel Carbon Fiber for Aerospace and Military Product Overview

#### 10.2.3 Hexcel Carbon Fiber for Aerospace and Military Product Market Performance

#### 10.2.4 Hexcel Business Overview

#### 10.2.5 Hexcel SWOT Analysis

#### 10.2.6 Hexcel Recent Developments

### 10.3 Jilin Tangu Carbon Fiber Co., Ltd.

#### 10.3.1 Jilin Tangu Carbon Fiber Co., Ltd. Basic Information

#### 10.3.2 Jilin Tangu Carbon Fiber Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview

10.3.3 Jilin Tangu Carbon Fiber Co., Ltd. Carbon Fiber for Aerospace and Military Product Market Performance

10.3.4 Jilin Tangu Carbon Fiber Co., Ltd. Business Overview

10.3.5 Jilin Tangu Carbon Fiber Co., Ltd. SWOT Analysis

10.3.6 Jilin Tangu Carbon Fiber Co., Ltd. Recent Developments

10.4 Mitsubishi Chemical

10.4.1 Mitsubishi Chemical Basic Information

10.4.2 Mitsubishi Chemical Carbon Fiber for Aerospace and Military Product Overview

10.4.3 Mitsubishi Chemical Carbon Fiber for Aerospace and Military Product Market Performance

10.4.4 Mitsubishi Chemical Business Overview

10.4.5 Mitsubishi Chemical Recent Developments

10.5 Teijin

10.5.1 Teijin Basic Information

10.5.2 Teijin Carbon Fiber for Aerospace and Military Product Overview

10.5.3 Teijin Carbon Fiber for Aerospace and Military Product Market Performance

10.5.4 Teijin Business Overview

10.5.5 Teijin Recent Developments

10.6 Hyosung Advanced Materials

10.6.1 Hyosung Advanced Materials Basic Information

10.6.2 Hyosung Advanced Materials Carbon Fiber for Aerospace and Military Product Overview

10.6.3 Hyosung Advanced Materials Carbon Fiber for Aerospace and Military Product Market Performance

10.6.4 Hyosung Advanced Materials Business Overview

10.6.5 Hyosung Advanced Materials Recent Developments

10.7 SGL Carbon

10.7.1 SGL Carbon Basic Information

10.7.2 SGL Carbon Carbon Fiber for Aerospace and Military Product Overview

10.7.3 SGL Carbon Carbon Fiber for Aerospace and Military Product Market Performance

10.7.4 SGL Carbon Business Overview

10.7.5 SGL Carbon Recent Developments

10.8 Zhongfu Shenying Carbon Fiber Co.,Ltd.

10.8.1 Zhongfu Shenying Carbon Fiber Co.,Ltd. Basic Information

10.8.2 Zhongfu Shenying Carbon Fiber Co.,Ltd. Carbon Fiber for Aerospace and Military Product Overview

10.8.3 Zhongfu Shenying Carbon Fiber Co.,Ltd. Carbon Fiber for Aerospace and Military Product Market Performance

- 10.8.4 Zhongfu Shenying Carbon Fiber Co.,Ltd. Business Overview
- 10.8.5 Zhongfu Shenying Carbon Fiber Co.,Ltd. Recent Developments
- 10.9 Weihai Guangwei Composites Co., Ltd.
  - 10.9.1 Weihai Guangwei Composites Co., Ltd. Basic Information
  - 10.9.2 Weihai Guangwei Composites Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview
  - 10.9.3 Weihai Guangwei Composites Co., Ltd. Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.9.4 Weihai Guangwei Composites Co., Ltd. Business Overview
  - 10.9.5 Weihai Guangwei Composites Co., Ltd. Recent Developments
- 10.10 Aksa Carbon
  - 10.10.1 Aksa Carbon Basic Information
  - 10.10.2 Aksa Carbon Carbon Fiber for Aerospace and Military Product Overview
  - 10.10.3 Aksa Carbon Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.10.4 Aksa Carbon Business Overview
  - 10.10.5 Aksa Carbon Recent Developments
- 10.11 Jiangsu Hengshen Co.,Ltd.
  - 10.11.1 Jiangsu Hengshen Co.,Ltd. Basic Information
  - 10.11.2 Jiangsu Hengshen Co.,Ltd. Carbon Fiber for Aerospace and Military Product Overview
  - 10.11.3 Jiangsu Hengshen Co.,Ltd. Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.11.4 Jiangsu Hengshen Co.,Ltd. Business Overview
  - 10.11.5 Jiangsu Hengshen Co.,Ltd. Recent Developments
- 10.12 Sinofibers Technology Co., Ltd.
  - 10.12.1 Sinofibers Technology Co., Ltd. Basic Information
  - 10.12.2 Sinofibers Technology Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview
  - 10.12.3 Sinofibers Technology Co., Ltd. Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.12.4 Sinofibers Technology Co., Ltd. Business Overview
  - 10.12.5 Sinofibers Technology Co., Ltd. Recent Developments
- 10.13 Formosa Plastic Group
  - 10.13.1 Formosa Plastic Group Basic Information
  - 10.13.2 Formosa Plastic Group Carbon Fiber for Aerospace and Military Product Overview
  - 10.13.3 Formosa Plastic Group Carbon Fiber for Aerospace and Military Product Market Performance

- 10.13.4 Formosa Plastic Group Business Overview
- 10.13.5 Formosa Plastic Group Recent Developments
- 10.14 Syensqo
  - 10.14.1 Syensqo Basic Information
  - 10.14.2 Syensqo Carbon Fiber for Aerospace and Military Product Overview
  - 10.14.3 Syensqo Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.14.4 Syensqo Business Overview
  - 10.14.5 Syensqo Recent Developments
- 10.15 UMATEX
  - 10.15.1 UMATEX Basic Information
  - 10.15.2 UMATEX Carbon Fiber for Aerospace and Military Product Overview
  - 10.15.3 UMATEX Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.15.4 UMATEX Business Overview
  - 10.15.5 UMATEX Recent Developments
- 10.16 Changsheng (Langfang) Technology Co., Ltd
  - 10.16.1 Changsheng (Langfang) Technology Co., Ltd Basic Information
  - 10.16.2 Changsheng (Langfang) Technology Co., Ltd Carbon Fiber for Aerospace and Military Product Overview
  - 10.16.3 Changsheng (Langfang) Technology Co., Ltd Carbon Fiber for Aerospace and Military Product Market Performance
  - 10.16.4 Changsheng (Langfang) Technology Co., Ltd Business Overview
  - 10.16.5 Changsheng (Langfang) Technology Co., Ltd Recent Developments

## **11 CARBON FIBER FOR AEROSPACE AND MILITARY MARKET FORECAST BY REGION**

- 11.1 Global Carbon Fiber for Aerospace and Military Market Size Forecast
- 11.2 Global Carbon Fiber for Aerospace and Military Market Forecast by Region
  - 11.2.1 North America Market Size Forecast by Country
  - 11.2.2 Europe Carbon Fiber for Aerospace and Military Market Size Forecast by Country
  - 11.2.3 Asia Pacific Carbon Fiber for Aerospace and Military Market Size Forecast by Region
  - 11.2.4 South America Carbon Fiber for Aerospace and Military Market Size Forecast by Country
  - 11.2.5 Middle East and Africa Forecasted Sales of Carbon Fiber for Aerospace and Military by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

12.1 Global Carbon Fiber for Aerospace and Military Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Carbon Fiber for Aerospace and Military by Type (2026-2035)

12.1.2 Global Carbon Fiber for Aerospace and Military Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Carbon Fiber for Aerospace and Military by Type (2026-2035)

12.2 Global Carbon Fiber for Aerospace and Military Market Forecast by Application (2026-2035)

12.2.1 Global Carbon Fiber for Aerospace and Military Sales (K MT) Forecast by Application

12.2.2 Global Carbon Fiber for Aerospace and Military Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Carbon Fiber for Aerospace and Military Market Size by Type (M USD)

Table 4. Global Carbon Fiber for Aerospace and Military Market Size by Application

Table 5. Carbon Fiber for Aerospace and Military Market Size Comparison by Region (M USD)

Table 6. Global Carbon Fiber for Aerospace and Military Sales (K MT) by Manufacturers (2020-2025)

Table 7. Global Carbon Fiber for Aerospace and Military Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Carbon Fiber for Aerospace and Military Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Carbon Fiber for Aerospace and Military Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Carbon Fiber for Aerospace and Military as of 2025)

Table 11. Global Market Carbon Fiber for Aerospace and Military Average Price (USD/KG) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Carbon Fiber for Aerospace and Military Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Carbon Fiber for Aerospace and Military Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Carbon Fiber for Aerospace and Military Sales by Type (K MT)

Table 27. Global Carbon Fiber for Aerospace and Military Market Size by Type (M USD)

Table 28. Global Carbon Fiber for Aerospace and Military Sales (K MT) by Type (2020-2025)

Table 29. Global Carbon Fiber for Aerospace and Military Sales Market Share by Type (2020-2025)

Table 30. Global Carbon Fiber for Aerospace and Military Market Size (M USD) by Type (2020-2025)

Table 31. Global Carbon Fiber for Aerospace and Military Market Share by Type (2020-2025)

Table 32. Global Carbon Fiber for Aerospace and Military Price (USD/KG) by Type (2020-2025)

Table 33. Global Carbon Fiber for Aerospace and Military Sales (K MT) by Application

Table 34. Global Carbon Fiber for Aerospace and Military Market Size by Application

Table 35. Global Carbon Fiber for Aerospace and Military Sales by Application (2020-2025) & (K MT)

Table 36. Global Carbon Fiber for Aerospace and Military Sales Market Share by Application (2020-2025)

Table 37. Global Carbon Fiber for Aerospace and Military Market Size by Application (2020-2025) & (M USD)

Table 38. Global Carbon Fiber for Aerospace and Military Market Share by Application (2020-2025)

Table 39. Global Carbon Fiber for Aerospace and Military Sales Growth Rate by Application (2020-2025)

Table 40. Global Carbon Fiber for Aerospace and Military Sales by Region (2020-2025) & (K MT)

Table 41. Global Carbon Fiber for Aerospace and Military Sales Market Share by Region (2020-2025)

Table 42. Global Carbon Fiber for Aerospace and Military Market Size by Region (2020-2025) & (M USD)

Table 43. Global Carbon Fiber for Aerospace and Military Market Size by Region (2020-2025)

Table 44. North America Carbon Fiber for Aerospace and Military Sales by Country (2020-2025) & (K MT)

Table 45. North America Carbon Fiber for Aerospace and Military Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Carbon Fiber for Aerospace and Military Sales by Country (2020-2025) & (K MT)

Table 47. Europe Carbon Fiber for Aerospace and Military Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Carbon Fiber for Aerospace and Military Sales by Region (2020-2025) & (K MT)

Table 49. Asia Pacific Carbon Fiber for Aerospace and Military Market Size by Region (2020-2025) & (M USD)

Table 50. South America Carbon Fiber for Aerospace and Military Sales by Country (2020-2025) & (K MT)

Table 51. South America Carbon Fiber for Aerospace and Military Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Carbon Fiber for Aerospace and Military Sales by Region (2020-2025) & (K MT)

Table 53. Middle East and Africa Carbon Fiber for Aerospace and Military Market Size by Region (2020-2025) & (M USD)

Table 54. Global Carbon Fiber for Aerospace and Military Production (K MT) by Region(2020-2025)

Table 55. Global Carbon Fiber for Aerospace and Military Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Carbon Fiber for Aerospace and Military Revenue Market Share by Region (2020-2025)

Table 57. Global Carbon Fiber for Aerospace and Military Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 58. North America Carbon Fiber for Aerospace and Military Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 59. Europe Carbon Fiber for Aerospace and Military Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 60. Japan Carbon Fiber for Aerospace and Military Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 61. China Carbon Fiber for Aerospace and Military Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 62. Toray Industries, Inc. Basic Information

Table 63. Toray Industries, Inc. Carbon Fiber for Aerospace and Military Product Overview

Table 64. Toray Industries, Inc. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. Toray Industries, Inc. Business Overview

Table 66. Toray Industries, Inc. SWOT Analysis

Table 67. Toray Industries, Inc. Recent Developments

Table 68. Hexcel Basic Information

Table 69. Hexcel Carbon Fiber for Aerospace and Military Product Overview

Table 70. Hexcel Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M

USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. Hexcel Business Overview

Table 72. Hexcel SWOT Analysis

Table 73. Hexcel Recent Developments

Table 74. Jilin Tangu Carbon Fiber Co., Ltd. Basic Information

Table 75. Jilin Tangu Carbon Fiber Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview

Table 76. Jilin Tangu Carbon Fiber Co., Ltd. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 77. Jilin Tangu Carbon Fiber Co., Ltd. Business Overview

Table 78. Jilin Tangu Carbon Fiber Co., Ltd. SWOT Analysis

Table 79. Jilin Tangu Carbon Fiber Co., Ltd. Recent Developments

Table 80. Mitsubishi Chemical Basic Information

Table 81. Mitsubishi Chemical Carbon Fiber for Aerospace and Military Product Overview

Table 82. Mitsubishi Chemical Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 83. Mitsubishi Chemical Business Overview

Table 84. Mitsubishi Chemical Recent Developments

Table 85. Teijin Basic Information

Table 86. Teijin Carbon Fiber for Aerospace and Military Product Overview

Table 87. Teijin Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 88. Teijin Business Overview

Table 89. Teijin Recent Developments

Table 90. Hyosung Advanced Materials Basic Information

Table 91. Hyosung Advanced Materials Carbon Fiber for Aerospace and Military Product Overview

Table 92. Hyosung Advanced Materials Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 93. Hyosung Advanced Materials Business Overview

Table 94. Hyosung Advanced Materials Recent Developments

Table 95. SGL Carbon Basic Information

Table 96. SGL Carbon Carbon Fiber for Aerospace and Military Product Overview

Table 97. SGL Carbon Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 98. SGL Carbon Business Overview

Table 99. SGL Carbon Recent Developments

Table 100. Zhongfu Shenying Carbon Fiber Co.,Ltd. Basic Information

Table 101. Zhongfu Shenying Carbon Fiber Co.,Ltd. Carbon Fiber for Aerospace and Military Product Overview

Table 102. Zhongfu Shenying Carbon Fiber Co.,Ltd. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 103. Zhongfu Shenying Carbon Fiber Co.,Ltd. Business Overview

Table 104. Zhongfu Shenying Carbon Fiber Co.,Ltd. Recent Developments

Table 105. Weihai Guangwei Composites Co., Ltd. Basic Information

Table 106. Weihai Guangwei Composites Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview

Table 107. Weihai Guangwei Composites Co., Ltd. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 108. Weihai Guangwei Composites Co., Ltd. Business Overview

Table 109. Weihai Guangwei Composites Co., Ltd. Recent Developments

Table 110. Aksa Carbon Basic Information

Table 111. Aksa Carbon Carbon Fiber for Aerospace and Military Product Overview

Table 112. Aksa Carbon Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 113. Aksa Carbon Business Overview

Table 114. Aksa Carbon Recent Developments

Table 115. Jiangsu Hengshen Co.,Ltd. Basic Information

Table 116. Jiangsu Hengshen Co.,Ltd. Carbon Fiber for Aerospace and Military Product Overview

Table 117. Jiangsu Hengshen Co.,Ltd. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 118. Jiangsu Hengshen Co.,Ltd. Business Overview

Table 119. Jiangsu Hengshen Co.,Ltd. Recent Developments

Table 120. Sinofibers Technology Co., Ltd. Basic Information

Table 121. Sinofibers Technology Co., Ltd. Carbon Fiber for Aerospace and Military Product Overview

Table 122. Sinofibers Technology Co., Ltd. Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 123. Sinofibers Technology Co., Ltd. Business Overview

Table 124. Sinofibers Technology Co., Ltd. Recent Developments

Table 125. Formosa Plastic Group Basic Information

Table 126. Formosa Plastic Group Carbon Fiber for Aerospace and Military Product Overview

Table 127. Formosa Plastic Group Carbon Fiber for Aerospace and Military Sales (K

MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 128. Formosa Plastic Group Business Overview

Table 129. Formosa Plastic Group Recent Developments

Table 130. Syensqo Basic Information

Table 131. Syensqo Carbon Fiber for Aerospace and Military Product Overview

Table 132. Syensqo Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 133. Syensqo Business Overview

Table 134. Syensqo Recent Developments

Table 135. UMATEX Basic Information

Table 136. UMATEX Carbon Fiber for Aerospace and Military Product Overview

Table 137. UMATEX Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 138. UMATEX Business Overview

Table 139. UMATEX Recent Developments

Table 140. Changsheng (Langfang) Technology Co., Ltd Basic Information

Table 141. Changsheng (Langfang) Technology Co., Ltd Carbon Fiber for Aerospace and Military Product Overview

Table 142. Changsheng (Langfang) Technology Co., Ltd Carbon Fiber for Aerospace and Military Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 143. Changsheng (Langfang) Technology Co., Ltd Business Overview

Table 144. Changsheng (Langfang) Technology Co., Ltd Recent Developments

Table 145. Global Carbon Fiber for Aerospace and Military Sales Forecast by Region (2026-2035) & (K MT)

Table 146. Global Carbon Fiber for Aerospace and Military Market Size Forecast by Region (2026-2035) & (M USD)

Table 147. North America Carbon Fiber for Aerospace and Military Sales Forecast by Country (2026-2035) & (K MT)

Table 148. North America Carbon Fiber for Aerospace and Military Market Size Forecast by Country (2026-2035) & (M USD)

Table 149. Europe Carbon Fiber for Aerospace and Military Sales Forecast by Country (2026-2035) & (K MT)

Table 150. Europe Carbon Fiber for Aerospace and Military Market Size Forecast by Country (2026-2035) & (M USD)

Table 151. Asia Pacific Carbon Fiber for Aerospace and Military Sales Forecast by Region (2026-2035) & (K MT)

Table 152. Asia Pacific Carbon Fiber for Aerospace and Military Market Size Forecast by Region (2026-2035) & (M USD)

Table 153. South America Carbon Fiber for Aerospace and Military Sales Forecast by Country (2026-2035) & (K MT)

Table 154. South America Carbon Fiber for Aerospace and Military Market Size Forecast by Country (2026-2035) & (M USD)

Table 155. Middle East and Africa Carbon Fiber for Aerospace and Military Sales Forecast by Country (2026-2035) & (Units)

Table 156. Middle East and Africa Carbon Fiber for Aerospace and Military Market Size Forecast by Country (2026-2035) & (M USD)

Table 157. Global Carbon Fiber for Aerospace and Military Sales Forecast by Type (2026-2035) & (K MT)

Table 158. Global Carbon Fiber for Aerospace and Military Market Size Forecast by Type (2026-2035) & (M USD)

Table 159. Global Carbon Fiber for Aerospace and Military Price Forecast by Type (2026-2035) & (USD/KG)

Table 160. Global Carbon Fiber for Aerospace and Military Sales (K MT) Forecast by Application (2026-2035)

Table 161. Global Carbon Fiber for Aerospace and Military Market Size Forecast by Application (2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Carbon Fiber for Aerospace and Military
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Carbon Fiber for Aerospace and Military Market Size (M USD), 2025-2035
- Figure 5. Global Carbon Fiber for Aerospace and Military Market Size (M USD) (2020-2035)
- Figure 6. Global Carbon Fiber for Aerospace and Military Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Carbon Fiber for Aerospace and Military Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Carbon Fiber for Aerospace and Military Product Life Cycle
- Figure 13. Carbon Fiber for Aerospace and Military Sales Share by Manufacturers in 2025
- Figure 14. Global Carbon Fiber for Aerospace and Military Revenue Share by Manufacturers in 2025
- Figure 15. Carbon Fiber for Aerospace and Military Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Carbon Fiber for Aerospace and Military Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Carbon Fiber for Aerospace and Military Revenue in 2025
- Figure 18. Industry Chain Map of Carbon Fiber for Aerospace and Military
- Figure 19. Global Carbon Fiber for Aerospace and Military Market PEST Analysis
- Figure 20. Global Carbon Fiber for Aerospace and Military Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Carbon Fiber for Aerospace and Military Market Share by Type
- Figure 27. Sales Market Share of Carbon Fiber for Aerospace and Military by Type

(2020-2025)

Figure 28. Sales Market Share of Carbon Fiber for Aerospace and Military by Type in 2025

Figure 29. Market Share of Carbon Fiber for Aerospace and Military by Type (2020-2025)

Figure 30. Market Share of Carbon Fiber for Aerospace and Military by Type in 2025

Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Carbon Fiber for Aerospace and Military Market Share by Application

Figure 33. Global Carbon Fiber for Aerospace and Military Sales Market Share by Application (2020-2025)

Figure 34. Global Carbon Fiber for Aerospace and Military Sales Market Share by Application in 2025

Figure 35. Global Carbon Fiber for Aerospace and Military Market Share by Application (2020-2025)

Figure 36. Global Carbon Fiber for Aerospace and Military Market Share by Application in 2025

Figure 37. Global Carbon Fiber for Aerospace and Military Sales Growth Rate by Application (2020-2025)

Figure 38. Global Carbon Fiber for Aerospace and Military Sales Market Share by Region (2020-2025)

Figure 39. Global Carbon Fiber for Aerospace and Military Market Size by Region (2020-2025)

Figure 40. North America Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 41. North America Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 42. North America Carbon Fiber for Aerospace and Military Sales Market Share by Country in 2024

Figure 43. North America Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Carbon Fiber for Aerospace and Military Market Size by Country in 2024

Figure 45. U.S. Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 46. U.S. Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Carbon Fiber for Aerospace and Military Sales (K MT) and Growth Rate (2020-2025)

Figure 48. Canada Carbon Fiber for Aerospace and Military Market Size (M USD) and

Growth Rate (2020-2025)

Figure 49. Mexico Carbon Fiber for Aerospace and Military Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Carbon Fiber for Aerospace and Military Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 52. Europe Carbon Fiber for Aerospace and Military Sales Market Share by Country in 2024

Figure 53. Europe Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Carbon Fiber for Aerospace and Military Market Size by Country in 2024

Figure 55. Germany Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 58. France Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Carbon Fiber for Aerospace and Military Sales and Growth Rate (K MT)

Figure 66. Asia Pacific Carbon Fiber for Aerospace and Military Sales Market Share by Region in 2024

Figure 67. Asia Pacific Carbon Fiber for Aerospace and Military Market Size by Region in 2024

Figure 68. China Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Carbon Fiber for Aerospace and Military Sales and Growth Rate (K MT)

Figure 79. South America Carbon Fiber for Aerospace and Military Sales Market Share by Country in 2024

Figure 80. South America Carbon Fiber for Aerospace and Military Market Size and Growth Rate (M USD)

Figure 81. South America Carbon Fiber for Aerospace and Military Market Size by Country in 2024

Figure 82. Brazil Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 85. Argentina Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 87. Columbia Carbon Fiber for Aerospace and Military Market Size and Growth

Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Carbon Fiber for Aerospace and Military Sales and Growth Rate (K MT)

Figure 89. Middle East and Africa Carbon Fiber for Aerospace and Military Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Carbon Fiber for Aerospace and Military Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Carbon Fiber for Aerospace and Military Market Size by Region in 2024

Figure 92. Saudi Arabia Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Carbon Fiber for Aerospace and Military Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa Carbon Fiber for Aerospace and Military Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Carbon Fiber for Aerospace and Military Production Market Share by Region (2020-2025)

Figure 103. North America Carbon Fiber for Aerospace and Military Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Carbon Fiber for Aerospace and Military Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Carbon Fiber for Aerospace and Military Production (K MT) Growth Rate (2020-2025)

Figure 106. China Carbon Fiber for Aerospace and Military Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Carbon Fiber for Aerospace and Military Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global Carbon Fiber for Aerospace and Military Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Carbon Fiber for Aerospace and Military Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Carbon Fiber for Aerospace and Military Market Share Forecast by Type (2026-2035)

Figure 111. Global Carbon Fiber for Aerospace and Military Sales Forecast by Application (2026-2035)

Figure 112. Global Carbon Fiber for Aerospace and Military Market Share Forecast by Application (2026-2035)

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