

Global PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. PAN-based Carbon Fibre Precursor refers to the raw material used in the production of high-performance carbon fibers, made primarily from polyacrylonitrile (PAN). It is the most widely used precursor for carbon fiber manufacturing due to its ability to produce fibers with high tensile strength, high modulus, and excellent chemical resistance. In 2024, the global production of PAN-based carbon fiber precursor reached 510,300 tons, with an average selling price of US\$3,703 per ton. PAN-based carbon fiber precursor fibers are produced using polyacrylonitrile (PAN) as the upstream raw material polymer, and processed through spinning, orientation, stabilization and other manufacturing steps, serving as the key starting material for carbon fiber production. The manufacturing route is complex and involves high technical barriers, and PAN-based precursor fibers account for the mainstream share of the carbon fiber precursor market. In terms of capacity structure, a typical single production line has an annual capacity of around 50,000-60,000 tons, while advanced large-scale facilities may reach or exceed 100,000 tons per year. This reflects how precursor manufacturers are expanding to meet the rising carbon fiber demand and downstream composite materials market. Regarding cost and profitability, the cost structure for producing PAN-based precursor fibers generally covers upstream acrylonitrile feedstock, spinning and stabilization equipment energy consumption, process additives, labor and depreciation. The feedstock and energy costs typically account for 60%-70% of total cost. Benefitting from technological and scale advantages, industry participants typically achieve a gross margin in the range of 20%-30% for precursor products. In terms of regional and competitive landscape, the Asia-Pacific region (especially China, Japan and South

Korea) is the major production and application zone for PAN-based precursor fibers. Global leading companies hold key technology and global supply-chain advantages, while Chinese and other emerging-market manufacturers offer catching-up potential in terms of scale, cost control and local downstream integration. Looking ahead, accelerated demand from electric vehicles, wind-turbine blades and aerospace composites will further drive expansion and technological upgrading in the PAN-based precursor industry.

The global PAN-based Carbon Fibre Precursor market size was estimated at USD 1889.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor market.

Global PAN-based Carbon Fibre Precursor 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.

Newtech Group Co., Ltd.

Aksa Carbon

Sinopec Shanghai Petrochemical Company Limited

Jiangsu Hengshen Co.,Ltd.

Sinofibers Technology Co., Ltd.

Formosa Plastic Group

Shanxi Gangke Carbon Materials Co., Ltd

Syensqo

UMATEX

Changsheng (Langfang) Technology Co., Ltd

Taekwang

Lanzhou Blue Star Fiber Co., Ltd

China National Petroleum Corporation Jilin Petrochemical Branch

Henan Yongmei Carbon Fiber Co., Ltd

Market Segmentation (by Type)

Small-tow

Large-tow

Market Segmentation (by Application)

Aerospace & Military
Wind Turbine Blades
Sports & Leisure
Pressure Vessels
Molding & Composite Materials
Automotive
Carbon-Carbon Composites
Construction
Electronics & Electrical
Others

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 PAN-based Carbon Fibre Precursor Market
Overview of the regional outlook of the PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor, 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 PAN-based Carbon Fibre Precursor
- 1.2 Key Market Segments
 - 1.2.1 PAN-based Carbon Fibre Precursor Segment by Type
 - 1.2.2 PAN-based Carbon Fibre Precursor 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 PAN-BASED CARBON FIBRE PRECURSOR MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global PAN-based Carbon Fibre Precursor Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global PAN-based Carbon Fibre Precursor Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 PAN-BASED CARBON FIBRE PRECURSOR MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global PAN-based Carbon Fibre Precursor Product Life Cycle
- 3.3 Global PAN-based Carbon Fibre Precursor Sales by Manufacturers (2020-2025)
- 3.4 Global PAN-based Carbon Fibre Precursor Revenue Market Share by Manufacturers (2020-2025)
- 3.5 PAN-based Carbon Fibre Precursor Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global PAN-based Carbon Fibre Precursor Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 PAN-based Carbon Fibre Precursor Market Competitive Situation and Trends

- 3.8.1 PAN-based Carbon Fibre Precursor Market Concentration Rate
- 3.8.2 Global 5 and 10 Largest PAN-based Carbon Fibre Precursor Players Market Share by Revenue
- 3.8.3 Mergers & Acquisitions, Expansion

4 PAN-BASED CARBON FIBRE PRECURSOR INDUSTRY CHAIN ANALYSIS

- 4.1 PAN-based Carbon Fibre Precursor 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 PAN-BASED CARBON FIBRE PRECURSOR 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 PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Market
- 5.7 ESG Ratings of Leading Companies

6 PAN-BASED CARBON FIBRE PRECURSOR MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global PAN-based Carbon Fibre Precursor Sales Market Share by Type

(2020-2025)

6.3 Global PAN-based Carbon Fibre Precursor Market Size by Type (2020-2025)

6.4 Global PAN-based Carbon Fibre Precursor Price by Type (2020-2025)

7 PAN-BASED CARBON FIBRE PRECURSOR MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global PAN-based Carbon Fibre Precursor Market Sales by Application
(2020-2025)

7.3 Global PAN-based Carbon Fibre Precursor Market Size (M USD) by Application
(2020-2025)

7.4 Global PAN-based Carbon Fibre Precursor Sales Growth Rate by Application
(2020-2025)

8 PAN-BASED CARBON FIBRE PRECURSOR MARKET SALES BY REGION

8.1 Global PAN-based Carbon Fibre Precursor Sales by Region

8.1.1 Global PAN-based Carbon Fibre Precursor Sales by Region

8.1.2 Global PAN-based Carbon Fibre Precursor Sales Market Share by Region

8.2 Global PAN-based Carbon Fibre Precursor Market Size by Region

8.2.1 Global PAN-based Carbon Fibre Precursor Market Size by Region

8.2.2 Global PAN-based Carbon Fibre Precursor Market Size by Region

8.3 North America

8.3.1 North America PAN-based Carbon Fibre Precursor Sales by Country

8.3.2 North America PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Sales by Country

8.4.2 Europe PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Sales by Region

- 8.5.2 Asia Pacific PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Sales by Country
 - 8.6.2 South America PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Sales by Region
 - 8.7.2 Middle East and Africa PAN-based Carbon Fibre Precursor 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 PAN-BASED CARBON FIBRE PRECURSOR MARKET PRODUCTION BY REGION

- 9.1 Global Production of PAN-based Carbon Fibre Precursor by Region(2020-2025)
- 9.2 Global PAN-based Carbon Fibre Precursor Revenue Market Share by Region (2020-2025)
- 9.3 Global PAN-based Carbon Fibre Precursor Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America PAN-based Carbon Fibre Precursor Production
 - 9.4.1 North America PAN-based Carbon Fibre Precursor Production Growth Rate (2020-2025)
 - 9.4.2 North America PAN-based Carbon Fibre Precursor Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe PAN-based Carbon Fibre Precursor Production
 - 9.5.1 Europe PAN-based Carbon Fibre Precursor Production Growth Rate (2020-2025)
 - 9.5.2 Europe PAN-based Carbon Fibre Precursor Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan PAN-based Carbon Fibre Precursor Production (2020-2025)

9.6.1 Japan PAN-based Carbon Fibre Precursor Production Growth Rate (2020-2025)

9.6.2 Japan PAN-based Carbon Fibre Precursor Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China PAN-based Carbon Fibre Precursor Production (2020-2025)

9.7.1 China PAN-based Carbon Fibre Precursor Production Growth Rate (2020-2025)

9.7.2 China PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview

10.1.3 Toray Industries, Inc. PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

10.2.3 Hexcel PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview

10.3.3 Jilin Tangu Carbon Fiber Co., Ltd. PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

10.4.3 Mitsubishi Chemical PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview
- 10.5.3 Teijin PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview
- 10.6.3 Hyosung Advanced Materials PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview
- 10.7.3 SGL Carbon PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview
- 10.8.3 Zhongfu Shenying Carbon Fiber Co.,Ltd. PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview
- 10.9.3 Weihai Guangwei Composites Co., Ltd. PAN-based Carbon Fibre Precursor 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 Newtech Group Co., Ltd.

10.10.1 Newtech Group Co., Ltd. Basic Information

10.10.2 Newtech Group Co., Ltd. PAN-based Carbon Fibre Precursor Product Overview

10.10.3 Newtech Group Co., Ltd. PAN-based Carbon Fibre Precursor Product Market Performance

10.10.4 Newtech Group Co., Ltd. Business Overview

10.10.5 Newtech Group Co., Ltd. Recent Developments

10.11 Aksa Carbon

10.11.1 Aksa Carbon Basic Information

10.11.2 Aksa Carbon PAN-based Carbon Fibre Precursor Product Overview

10.11.3 Aksa Carbon PAN-based Carbon Fibre Precursor Product Market Performance

10.11.4 Aksa Carbon Business Overview

10.11.5 Aksa Carbon Recent Developments

10.12 Sinopec Shanghai Petrochemical Company Limited

10.12.1 Sinopec Shanghai Petrochemical Company Limited Basic Information

10.12.2 Sinopec Shanghai Petrochemical Company Limited PAN-based Carbon Fibre Precursor Product Overview

10.12.3 Sinopec Shanghai Petrochemical Company Limited PAN-based Carbon Fibre Precursor Product Market Performance

10.12.4 Sinopec Shanghai Petrochemical Company Limited Business Overview

10.12.5 Sinopec Shanghai Petrochemical Company Limited Recent Developments

10.13 Jiangsu Hengshen Co.,Ltd.

10.13.1 Jiangsu Hengshen Co.,Ltd. Basic Information

10.13.2 Jiangsu Hengshen Co.,Ltd. PAN-based Carbon Fibre Precursor Product Overview

10.13.3 Jiangsu Hengshen Co.,Ltd. PAN-based Carbon Fibre Precursor Product Market Performance

10.13.4 Jiangsu Hengshen Co.,Ltd. Business Overview

10.13.5 Jiangsu Hengshen Co.,Ltd. Recent Developments

10.14 Sinofibers Technology Co., Ltd.

10.14.1 Sinofibers Technology Co., Ltd. Basic Information

10.14.2 Sinofibers Technology Co., Ltd. PAN-based Carbon Fibre Precursor Product Overview

10.14.3 Sinofibers Technology Co., Ltd. PAN-based Carbon Fibre Precursor Product Market Performance

10.14.4 Sinofibers Technology Co., Ltd. Business Overview

10.14.5 Sinofibers Technology Co., Ltd. Recent Developments

10.15 Formosa Plastic Group

10.15.1 Formosa Plastic Group Basic Information

10.15.2 Formosa Plastic Group PAN-based Carbon Fibre Precursor Product Overview

10.15.3 Formosa Plastic Group PAN-based Carbon Fibre Precursor Product Market

Performance

10.15.4 Formosa Plastic Group Business Overview

10.15.5 Formosa Plastic Group Recent Developments

10.16 Shanxi Gangke Carbon Materials Co., Ltd

10.16.1 Shanxi Gangke Carbon Materials Co., Ltd Basic Information

10.16.2 Shanxi Gangke Carbon Materials Co., Ltd PAN-based Carbon Fibre Precursor Product Overview

10.16.3 Shanxi Gangke Carbon Materials Co., Ltd PAN-based Carbon Fibre Precursor Product Market Performance

10.16.4 Shanxi Gangke Carbon Materials Co., Ltd Business Overview

10.16.5 Shanxi Gangke Carbon Materials Co., Ltd Recent Developments

10.17 Syensqo

10.17.1 Syensqo Basic Information

10.17.2 Syensqo PAN-based Carbon Fibre Precursor Product Overview

10.17.3 Syensqo PAN-based Carbon Fibre Precursor Product Market Performance

10.17.4 Syensqo Business Overview

10.17.5 Syensqo Recent Developments

10.18 UMATEX

10.18.1 UMATEX Basic Information

10.18.2 UMATEX PAN-based Carbon Fibre Precursor Product Overview

10.18.3 UMATEX PAN-based Carbon Fibre Precursor Product Market Performance

10.18.4 UMATEX Business Overview

10.18.5 UMATEX Recent Developments

10.19 Changsheng (Langfang) Technology Co., Ltd

10.19.1 Changsheng (Langfang) Technology Co., Ltd Basic Information

10.19.2 Changsheng (Langfang) Technology Co., Ltd PAN-based Carbon Fibre Precursor Product Overview

10.19.3 Changsheng (Langfang) Technology Co., Ltd PAN-based Carbon Fibre Precursor Product Market Performance

10.19.4 Changsheng (Langfang) Technology Co., Ltd Business Overview

10.19.5 Changsheng (Langfang) Technology Co., Ltd Recent Developments

10.20 Taekwang

10.20.1 Taekwang Basic Information

10.20.2 Taekwang PAN-based Carbon Fibre Precursor Product Overview

10.20.3 Taekwang PAN-based Carbon Fibre Precursor Product Market Performance

- 10.20.4 Taekwang Business Overview
- 10.20.5 Taekwang Recent Developments
- 10.21 Lanzhou Blue Star Fiber Co., Ltd
 - 10.21.1 Lanzhou Blue Star Fiber Co., Ltd Basic Information
 - 10.21.2 Lanzhou Blue Star Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Overview
 - 10.21.3 Lanzhou Blue Star Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Market Performance
 - 10.21.4 Lanzhou Blue Star Fiber Co., Ltd Business Overview
 - 10.21.5 Lanzhou Blue Star Fiber Co., Ltd Recent Developments
- 10.22 China National Petroleum Corporation Jilin Petrochemical Branch
 - 10.22.1 China National Petroleum Corporation Jilin Petrochemical Branch Basic Information
 - 10.22.2 China National Petroleum Corporation Jilin Petrochemical Branch PAN-based Carbon Fibre Precursor Product Overview
 - 10.22.3 China National Petroleum Corporation Jilin Petrochemical Branch PAN-based Carbon Fibre Precursor Product Market Performance
 - 10.22.4 China National Petroleum Corporation Jilin Petrochemical Branch Business Overview
 - 10.22.5 China National Petroleum Corporation Jilin Petrochemical Branch Recent Developments
- 10.23 Henan Yongmei Carbon Fiber Co., Ltd
 - 10.23.1 Henan Yongmei Carbon Fiber Co., Ltd Basic Information
 - 10.23.2 Henan Yongmei Carbon Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Overview
 - 10.23.3 Henan Yongmei Carbon Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Market Performance
 - 10.23.4 Henan Yongmei Carbon Fiber Co., Ltd Business Overview
 - 10.23.5 Henan Yongmei Carbon Fiber Co., Ltd Recent Developments

11 PAN-BASED CARBON FIBRE PRECURSOR MARKET FORECAST BY REGION

- 11.1 Global PAN-based Carbon Fibre Precursor Market Size Forecast
- 11.2 Global PAN-based Carbon Fibre Precursor Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe PAN-based Carbon Fibre Precursor Market Size Forecast by Country
 - 11.2.3 Asia Pacific PAN-based Carbon Fibre Precursor Market Size Forecast by Region
 - 11.2.4 South America PAN-based Carbon Fibre Precursor Market Size Forecast by

Country

11.2.5 Middle East and Africa Forecasted Sales of PAN-based Carbon Fibre Precursor by Country

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

12.1 Global PAN-based Carbon Fibre Precursor Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of PAN-based Carbon Fibre Precursor by Type (2026-2035)

12.1.2 Global PAN-based Carbon Fibre Precursor Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of PAN-based Carbon Fibre Precursor by Type (2026-2035)

12.2 Global PAN-based Carbon Fibre Precursor Market Forecast by Application (2026-2035)

12.2.1 Global PAN-based Carbon Fibre Precursor Sales (K MT) Forecast by Application

12.2.2 Global PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Market Size by Type (M USD)
- Table 4. Global PAN-based Carbon Fibre Precursor Market Size by Application
- Table 5. PAN-based Carbon Fibre Precursor Market Size Comparison by Region (M USD)
- Table 6. Global PAN-based Carbon Fibre Precursor Sales (K MT) by Manufacturers (2020-2025)
- Table 7. Global PAN-based Carbon Fibre Precursor Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global PAN-based Carbon Fibre Precursor Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global PAN-based Carbon Fibre Precursor Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in PAN-based Carbon Fibre Precursor as of 2025)
- Table 11. Global Market PAN-based Carbon Fibre Precursor Average Price (USD/KG) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Sales by Type (K MT)

Table 27. Global PAN-based Carbon Fibre Precursor Market Size by Type (M USD)

Table 28. Global PAN-based Carbon Fibre Precursor Sales (K MT) by Type (2020-2025)

Table 29. Global PAN-based Carbon Fibre Precursor Sales Market Share by Type (2020-2025)

Table 30. Global PAN-based Carbon Fibre Precursor Market Size (M USD) by Type (2020-2025)

Table 31. Global PAN-based Carbon Fibre Precursor Market Share by Type (2020-2025)

Table 32. Global PAN-based Carbon Fibre Precursor Price (USD/KG) by Type (2020-2025)

Table 33. Global PAN-based Carbon Fibre Precursor Sales (K MT) by Application

Table 34. Global PAN-based Carbon Fibre Precursor Market Size by Application

Table 35. Global PAN-based Carbon Fibre Precursor Sales by Application (2020-2025) & (K MT)

Table 36. Global PAN-based Carbon Fibre Precursor Sales Market Share by Application (2020-2025)

Table 37. Global PAN-based Carbon Fibre Precursor Market Size by Application (2020-2025) & (M USD)

Table 38. Global PAN-based Carbon Fibre Precursor Market Share by Application (2020-2025)

Table 39. Global PAN-based Carbon Fibre Precursor Sales Growth Rate by Application (2020-2025)

Table 40. Global PAN-based Carbon Fibre Precursor Sales by Region (2020-2025) & (K MT)

Table 41. Global PAN-based Carbon Fibre Precursor Sales Market Share by Region (2020-2025)

Table 42. Global PAN-based Carbon Fibre Precursor Market Size by Region (2020-2025) & (M USD)

Table 43. Global PAN-based Carbon Fibre Precursor Market Size by Region (2020-2025)

Table 44. North America PAN-based Carbon Fibre Precursor Sales by Country (2020-2025) & (K MT)

Table 45. North America PAN-based Carbon Fibre Precursor Market Size by Country (2020-2025) & (M USD)

Table 46. Europe PAN-based Carbon Fibre Precursor Sales by Country (2020-2025) & (K MT)

Table 47. Europe PAN-based Carbon Fibre Precursor Market Size by Country (2020-2025) & (M USD)

- Table 48. Asia Pacific PAN-based Carbon Fibre Precursor Sales by Region (2020-2025) & (K MT)
- Table 49. Asia Pacific PAN-based Carbon Fibre Precursor Market Size by Region (2020-2025) & (M USD)
- Table 50. South America PAN-based Carbon Fibre Precursor Sales by Country (2020-2025) & (K MT)
- Table 51. South America PAN-based Carbon Fibre Precursor Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa PAN-based Carbon Fibre Precursor Sales by Region (2020-2025) & (K MT)
- Table 53. Middle East and Africa PAN-based Carbon Fibre Precursor Market Size by Region (2020-2025) & (M USD)
- Table 54. Global PAN-based Carbon Fibre Precursor Production (K MT) by Region(2020-2025)
- Table 55. Global PAN-based Carbon Fibre Precursor Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global PAN-based Carbon Fibre Precursor Revenue Market Share by Region (2020-2025)
- Table 57. Global PAN-based Carbon Fibre Precursor Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 58. North America PAN-based Carbon Fibre Precursor Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 59. Europe PAN-based Carbon Fibre Precursor Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 60. Japan PAN-based Carbon Fibre Precursor Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 61. China PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview
- Table 64. Toray Industries, Inc. PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview
- Table 70. Hexcel PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview

Table 76. Jilin Tangu Carbon Fiber Co., Ltd. PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

Table 82. Mitsubishi Chemical PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

Table 87. Teijin PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

Table 92. Hyosung Advanced Materials PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Product Overview

Table 97. SGL Carbon PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview

Table 102. Zhongfu Shenying Carbon Fiber Co.,Ltd. PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Product Overview

Table 107. Weihai Guangwei Composites Co., Ltd. PAN-based Carbon Fibre Precursor 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. Newtech Group Co., Ltd. Basic Information

Table 111. Newtech Group Co., Ltd. PAN-based Carbon Fibre Precursor Product Overview

Table 112. Newtech Group Co., Ltd. PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 113. Newtech Group Co., Ltd. Business Overview

Table 114. Newtech Group Co., Ltd. Recent Developments

Table 115. Aksa Carbon Basic Information

Table 116. Aksa Carbon PAN-based Carbon Fibre Precursor Product Overview

Table 117. Aksa Carbon PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 118. Aksa Carbon Business Overview

Table 119. Aksa Carbon Recent Developments

Table 120. Sinopec Shanghai Petrochemical Company Limited Basic Information

Table 121. Sinopec Shanghai Petrochemical Company Limited PAN-based Carbon Fibre Precursor Product Overview

Table 122. Sinopec Shanghai Petrochemical Company Limited PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 123. Sinopec Shanghai Petrochemical Company Limited Business Overview

Table 124. Sinopec Shanghai Petrochemical Company Limited Recent Developments

Table 125. Jiangsu Hengshen Co.,Ltd. Basic Information

Table 126. Jiangsu Hengshen Co.,Ltd. PAN-based Carbon Fibre Precursor Product Overview

Table 127. Jiangsu Hengshen Co.,Ltd. PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 128. Jiangsu Hengshen Co.,Ltd. Business Overview

- Table 129. Jiangsu Hengshen Co.,Ltd. Recent Developments
- Table 130. Sinofibers Technology Co., Ltd. Basic Information
- Table 131. Sinofibers Technology Co., Ltd. PAN-based Carbon Fibre Precursor Product Overview
- Table 132. Sinofibers Technology Co., Ltd. PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 133. Sinofibers Technology Co., Ltd. Business Overview
- Table 134. Sinofibers Technology Co., Ltd. Recent Developments
- Table 135. Formosa Plastic Group Basic Information
- Table 136. Formosa Plastic Group PAN-based Carbon Fibre Precursor Product Overview
- Table 137. Formosa Plastic Group PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 138. Formosa Plastic Group Business Overview
- Table 139. Formosa Plastic Group Recent Developments
- Table 140. Shanxi Gangke Carbon Materials Co., Ltd Basic Information
- Table 141. Shanxi Gangke Carbon Materials Co., Ltd PAN-based Carbon Fibre Precursor Product Overview
- Table 142. Shanxi Gangke Carbon Materials Co., Ltd PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 143. Shanxi Gangke Carbon Materials Co., Ltd Business Overview
- Table 144. Shanxi Gangke Carbon Materials Co., Ltd Recent Developments
- Table 145. Syensqo Basic Information
- Table 146. Syensqo PAN-based Carbon Fibre Precursor Product Overview
- Table 147. Syensqo PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 148. Syensqo Business Overview
- Table 149. Syensqo Recent Developments
- Table 150. UMATEX Basic Information
- Table 151. UMATEX PAN-based Carbon Fibre Precursor Product Overview
- Table 152. UMATEX PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 153. UMATEX Business Overview
- Table 154. UMATEX Recent Developments
- Table 155. Changsheng (Langfang) Technology Co., Ltd Basic Information
- Table 156. Changsheng (Langfang) Technology Co., Ltd PAN-based Carbon Fibre Precursor Product Overview
- Table 157. Changsheng (Langfang) Technology Co., Ltd PAN-based Carbon Fibre

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

Table 158. Changsheng (Langfang) Technology Co., Ltd Business Overview

Table 159. Changsheng (Langfang) Technology Co., Ltd Recent Developments

Table 160. Taekwang Basic Information

Table 161. Taekwang PAN-based Carbon Fibre Precursor Product Overview

Table 162. Taekwang PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 163. Taekwang Business Overview

Table 164. Taekwang Recent Developments

Table 165. Lanzhou Blue Star Fiber Co., Ltd Basic Information

Table 166. Lanzhou Blue Star Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Overview

Table 167. Lanzhou Blue Star Fiber Co., Ltd PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 168. Lanzhou Blue Star Fiber Co., Ltd Business Overview

Table 169. Lanzhou Blue Star Fiber Co., Ltd Recent Developments

Table 170. China National Petroleum Corporation Jilin Petrochemical Branch Basic Information

Table 171. China National Petroleum Corporation Jilin Petrochemical Branch PAN-based Carbon Fibre Precursor Product Overview

Table 172. China National Petroleum Corporation Jilin Petrochemical Branch PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 173. China National Petroleum Corporation Jilin Petrochemical Branch Business Overview

Table 174. China National Petroleum Corporation Jilin Petrochemical Branch Recent Developments

Table 175. Henan Yongmei Carbon Fiber Co., Ltd Basic Information

Table 176. Henan Yongmei Carbon Fiber Co., Ltd PAN-based Carbon Fibre Precursor Product Overview

Table 177. Henan Yongmei Carbon Fiber Co., Ltd PAN-based Carbon Fibre Precursor Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 178. Henan Yongmei Carbon Fiber Co., Ltd Business Overview

Table 179. Henan Yongmei Carbon Fiber Co., Ltd Recent Developments

Table 180. Global PAN-based Carbon Fibre Precursor Sales Forecast by Region (2026-2035) & (K MT)

Table 181. Global PAN-based Carbon Fibre Precursor Market Size Forecast by Region (2026-2035) & (M USD)

Table 182. North America PAN-based Carbon Fibre Precursor Sales Forecast by Country (2026-2035) & (K MT)

Table 183. North America PAN-based Carbon Fibre Precursor Market Size Forecast by Country (2026-2035) & (M USD)

Table 184. Europe PAN-based Carbon Fibre Precursor Sales Forecast by Country (2026-2035) & (K MT)

Table 185. Europe PAN-based Carbon Fibre Precursor Market Size Forecast by Country (2026-2035) & (M USD)

Table 186. Asia Pacific PAN-based Carbon Fibre Precursor Sales Forecast by Region (2026-2035) & (K MT)

Table 187. Asia Pacific PAN-based Carbon Fibre Precursor Market Size Forecast by Region (2026-2035) & (M USD)

Table 188. South America PAN-based Carbon Fibre Precursor Sales Forecast by Country (2026-2035) & (K MT)

Table 189. South America PAN-based Carbon Fibre Precursor Market Size Forecast by Country (2026-2035) & (M USD)

Table 190. Middle East and Africa PAN-based Carbon Fibre Precursor Sales Forecast by Country (2026-2035) & (Units)

Table 191. Middle East and Africa PAN-based Carbon Fibre Precursor Market Size Forecast by Country (2026-2035) & (M USD)

Table 192. Global PAN-based Carbon Fibre Precursor Sales Forecast by Type (2026-2035) & (K MT)

Table 193. Global PAN-based Carbon Fibre Precursor Market Size Forecast by Type (2026-2035) & (M USD)

Table 194. Global PAN-based Carbon Fibre Precursor Price Forecast by Type (2026-2035) & (USD/KG)

Table 195. Global PAN-based Carbon Fibre Precursor Sales (K MT) Forecast by Application (2026-2035)

Table 196. Global PAN-based Carbon Fibre Precursor Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of PAN-based Carbon Fibre Precursor
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global PAN-based Carbon Fibre Precursor Market Size (M USD), 2025-2035
- Figure 5. Global PAN-based Carbon Fibre Precursor Market Size (M USD) (2020-2035)
- Figure 6. Global PAN-based Carbon Fibre Precursor 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. PAN-based Carbon Fibre Precursor Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global PAN-based Carbon Fibre Precursor Product Life Cycle
- Figure 13. PAN-based Carbon Fibre Precursor Sales Share by Manufacturers in 2025
- Figure 14. Global PAN-based Carbon Fibre Precursor Revenue Share by Manufacturers in 2025
- Figure 15. PAN-based Carbon Fibre Precursor Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market PAN-based Carbon Fibre Precursor Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by PAN-based Carbon Fibre Precursor Revenue in 2025
- Figure 18. Industry Chain Map of PAN-based Carbon Fibre Precursor
- Figure 19. Global PAN-based Carbon Fibre Precursor Market PEST Analysis
- Figure 20. Global PAN-based Carbon Fibre Precursor 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 PAN-based Carbon Fibre Precursor Market Share by Type
- Figure 27. Sales Market Share of PAN-based Carbon Fibre Precursor by Type (2020-2025)
- Figure 28. Sales Market Share of PAN-based Carbon Fibre Precursor by Type in 2025
- Figure 29. Market Share of PAN-based Carbon Fibre Precursor by Type (2020-2025)

- Figure 30. Market Share of PAN-based Carbon Fibre Precursor by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global PAN-based Carbon Fibre Precursor Market Share by Application
- Figure 33. Global PAN-based Carbon Fibre Precursor Sales Market Share by Application (2020-2025)
- Figure 34. Global PAN-based Carbon Fibre Precursor Sales Market Share by Application in 2025
- Figure 35. Global PAN-based Carbon Fibre Precursor Market Share by Application (2020-2025)
- Figure 36. Global PAN-based Carbon Fibre Precursor Market Share by Application in 2025
- Figure 37. Global PAN-based Carbon Fibre Precursor Sales Growth Rate by Application (2020-2025)
- Figure 38. Global PAN-based Carbon Fibre Precursor Sales Market Share by Region (2020-2025)
- Figure 39. Global PAN-based Carbon Fibre Precursor Market Size by Region (2020-2025)
- Figure 40. North America PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)
- Figure 41. North America PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)
- Figure 42. North America PAN-based Carbon Fibre Precursor Sales Market Share by Country in 2024
- Figure 43. North America PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America PAN-based Carbon Fibre Precursor Market Size by Country in 2024
- Figure 45. U.S. PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)
- Figure 46. U.S. PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada PAN-based Carbon Fibre Precursor Sales (K MT) and Growth Rate (2020-2025)
- Figure 48. Canada PAN-based Carbon Fibre Precursor Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico PAN-based Carbon Fibre Precursor Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico PAN-based Carbon Fibre Precursor Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 52. Europe PAN-based Carbon Fibre Precursor Sales Market Share by Country in 2024

Figure 53. Europe PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe PAN-based Carbon Fibre Precursor Market Size by Country in 2024

Figure 55. Germany PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 58. France PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific PAN-based Carbon Fibre Precursor Sales and Growth Rate (K MT)

Figure 66. Asia Pacific PAN-based Carbon Fibre Precursor Sales Market Share by Region in 2024

Figure 67. Asia Pacific PAN-based Carbon Fibre Precursor Market Size by Region in 2024

Figure 68. China PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America PAN-based Carbon Fibre Precursor Sales and Growth Rate (K MT)

Figure 79. South America PAN-based Carbon Fibre Precursor Sales Market Share by Country in 2024

Figure 80. South America PAN-based Carbon Fibre Precursor Market Size and Growth Rate (M USD)

Figure 81. South America PAN-based Carbon Fibre Precursor Market Size by Country in 2024

Figure 82. Brazil PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 85. Argentina PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 87. Columbia PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa PAN-based Carbon Fibre Precursor Sales and Growth Rate (K MT)

Figure 89. Middle East and Africa PAN-based Carbon Fibre Precursor Sales Market Share by Region in 2024

Figure 90. Middle East and Africa PAN-based Carbon Fibre Precursor Market Size and

Growth Rate (M USD)

Figure 91. Middle East and Africa PAN-based Carbon Fibre Precursor Market Size by Region in 2024

Figure 92. Saudi Arabia PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa PAN-based Carbon Fibre Precursor Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa PAN-based Carbon Fibre Precursor Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global PAN-based Carbon Fibre Precursor Production Market Share by Region (2020-2025)

Figure 103. North America PAN-based Carbon Fibre Precursor Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe PAN-based Carbon Fibre Precursor Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan PAN-based Carbon Fibre Precursor Production (K MT) Growth Rate (2020-2025)

Figure 106. China PAN-based Carbon Fibre Precursor Production (K MT) Growth Rate (2020-2025)

Figure 107. Global PAN-based Carbon Fibre Precursor Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global PAN-based Carbon Fibre Precursor Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global PAN-based Carbon Fibre Precursor Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global PAN-based Carbon Fibre Precursor Market Share Forecast by Type (2026-2035)

Figure 111. Global PAN-based Carbon Fibre Precursor Sales Forecast by Application (2026-2035)

Figure 112. Global PAN-based Carbon Fibre Precursor Market Share Forecast by Application (2026-2035)

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