

Global Carbon Fiber Composite Rocket Propellant Tanks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Fiber Composite Rocket Propellant Tanks market size is expected to reach \$ 309 million by 2032, rising at a market growth of 13.2% CAGR during the forecast period (2026-2032).

Carbon fiber composite rocket propellant tanks are lightweight propellant storage components used in liquid launch vehicles, reusable rockets, upper stages, and rocket propulsion test systems. They focus on fuel tanks, oxidizer tanks, common bulkhead tanks, and engineering validation tanks that carry liquid oxygen, liquid hydrogen, liquid methane, kerosene, and other liquid propellants. These products use carbon fiber reinforced polymer composites as the main structural material and integrate processes such as automated fiber placement, filament winding, prepreg layup, co curing, cryogenic sealing, liner matching, nondestructive testing, and pressure cycle validation to achieve low structural mass, high specific strength, cryogenic adaptability, leakage resistance, and safe pressure bearing performance under launch conditions. Key specifications include tank volume, operating pressure, burst pressure, cryogenic cycle life, propellant compatibility, structural efficiency, dry mass, permeability, interface accuracy, and flight qualification level. They are mainly used in commercial space launch, reusable rockets, cryogenic upper stages, new liquid oxygen methane rockets, and deep space launch systems. In 2025, the global carbon fiber composite rocket propellant tank industry had an average gross margin of about 28% to 42%.

The upstream supply chain for carbon fiber composite rocket propellant tanks includes aerospace grade carbon fiber, cryogenic resin systems, prepregs, liner materials, sealing materials, sensors, and nondestructive testing equipment. The midstream segment covers tank design, composite forming, curing, assembly, cryogenic qualification, pressure cycling, and flight certification. Downstream demand comes

mainly from commercial launch vehicles, reusable rockets, government deep space missions, and next generation liquid launch systems. The product is not simply a composite material replacement. It is a high reliability rocket structure that aims to reduce dry mass, improve payload efficiency, and support the transition toward cryogenic and reusable propulsion architectures.

The competitive landscape remains at an early stage. Only a limited number of companies have credible capability in large composite propellant tank manufacturing, cryogenic validation, and rocket level integration. Supply is concentrated in regions with strong aerospace engineering bases, especially the United States, Europe, China, Japan, and Australia. Traditional aerospace suppliers tend to move through government funded development and qualification programs, while commercial launch companies often develop captive manufacturing routes to fit their own vehicle designs. The industry is moving from laboratory demonstrators to engineering articles, limited production, and flight test preparation, but low temperature leakage control, structural reliability, material compatibility, and certification cycles remain major constraints.

Policy support and capital expenditure are improving the conditions for commercialization. Commercial space policies, deep space exploration programs, low cost launch demand, and regional supply chain localization are pushing continued investment in composite tank technologies. Future growth will depend on the pace of new rocket programs, the success rate of cryogenic composite tank flight validation, and improvements in manufacturing yield. Over the medium to long term, carbon fiber composite rocket propellant tanks have meaningful substitution potential, but they are unlikely to replace metal tanks across all launch vehicles quickly. Adoption is more likely to start in upper stages, liquid oxygen methane rockets, lightweight launch systems, and selected high performance vehicle programs.

This report studies the global Carbon Fiber Composite Rocket Propellant Tanks production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon Fiber Composite Rocket Propellant Tanks and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Carbon Fiber Composite Rocket Propellant Tanks that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon Fiber Composite Rocket Propellant Tanks total production and demand, 2021-2032, (Units)

Global Carbon Fiber Composite Rocket Propellant Tanks total production value, 2021-2032, (USD Million)

Global Carbon Fiber Composite Rocket Propellant Tanks production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Carbon Fiber Composite Rocket Propellant Tanks consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Carbon Fiber Composite Rocket Propellant Tanks domestic production, consumption, key domestic manufacturers and share

Global Carbon Fiber Composite Rocket Propellant Tanks production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Carbon Fiber Composite Rocket Propellant Tanks production by Stored Medium, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Carbon Fiber Composite Rocket Propellant Tanks production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Carbon Fiber Composite Rocket Propellant Tanks market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include L3Harris Technologies, Inc., General Dynamics Ordnance and Tactical Systems, Eaton Corporation plc, Steelhead Composites, Inc., HyPerComp Engineering, Inc., Infinite Composites, Inc., Scorpius Space Launch Company, Blackwave GmbH, MT Aerospace AG, The Boeing Company, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Carbon Fiber Composite Rocket Propellant Tanks market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Stored Medium, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and

2027-2032 as the forecast year.

Global Carbon Fiber Composite Rocket Propellant Tanks Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon Fiber Composite Rocket Propellant Tanks Market, Segmentation by Stored Medium:

Liquid Oxygen Tanks

Liquid Hydrogen Tanks

Liquid Methane Tanks

Pressurant Gas Tanks

Others

Global Carbon Fiber Composite Rocket Propellant Tanks Market, Segmentation by Manufacturing Process:

Filament-wound Tanks

Automated Fiber Placement Tanks

Prepreg Layup Tanks

Hybrid Process Tanks

Others

Global Carbon Fiber Composite Rocket Propellant Tanks Market, Segmentation by Capacity Class:

Small Tanks (5,000 L)

Others

Global Carbon Fiber Composite Rocket Propellant Tanks Market, Segmentation by Application:

Commercial Space Launch

Government Civil Space

Defense and National Security Space

Research and Technology Demonstration

Others

Companies Profiled:

L3Harris Technologies, Inc.

General Dynamics Ordnance and Tactical Systems

Eaton Corporation plc

Steelhead Composites, Inc.

HyPerComp Engineering, Inc.

Infinite Composites, Inc.

Scorpius Space Launch Company

Blackwave GmbH

MT Aerospace AG

The Boeing Company

Rocket Lab USA, Inc.

Firefly Aerospace Inc.

Hanwha Cimarron LLC

APEX Space & Defense Systems

Reaction Dynamics

Omni Tanker Pty Ltd

Gilmour Space Technologies Pty Ltd

MaruHachi Corporation

China Aerospace Science and Technology Corporation

Beijing Weiguang Qihang Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Carbon Fiber Composite Rocket Propellant Tanks market?
2. What is the demand of the global Carbon Fiber Composite Rocket Propellant Tanks

market?

3. What is the year over year growth of the global Carbon Fiber Composite Rocket Propellant Tanks market?
4. What is the production and production value of the global Carbon Fiber Composite Rocket Propellant Tanks market?
5. Who are the key producers in the global Carbon Fiber Composite Rocket Propellant Tanks market?
6. What are the growth factors driving the market demand?

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