

Global Carbon Fiber Composite Sizing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Fiber Composite Sizing market size is expected to reach \$ 879 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

In 2025, the global carbon fiber composite sizing agent industry maintains an average gross margin of approximately 28%–45%. Carbon fiber composite sizing agents are high-performance interfacial functional chemicals designed for surface modification and interface engineering of carbon fibers used in advanced composite materials. These products are typically formulated as water-based emulsions, polymer dispersions, resin-compatible coating systems, or multifunctional surface treatment chemistries applied during carbon fiber manufacturing, oxidation, surface activation, or winding processes. Their primary function is to improve interfacial adhesion, wettability, resin impregnation efficiency, fiber protection, dispersion stability, and downstream composite processing compatibility between carbon fibers and thermoset or thermoplastic resin matrices. This research mainly focuses on sizing systems compatible with epoxy, polyamide (PA), polyether ether ketone (PEEK), polyphenylene sulfide (PPS), polyurethane (PU), and other high-performance composite resin systems, including aerospace-grade, wind energy-grade, pressure vessel-grade, automotive lightweighting-grade, and industrial-grade carbon fiber composite applications. Key performance indicators generally include interfacial shear strength (IFSS), thermal resistance, surface energy matching capability, fiber handling protection, resin compatibility, and fatigue durability enhancement. These materials are widely used in aerospace structures, wind turbine blades, hydrogen storage vessels, automotive lightweighting, rail transportation, sporting goods, and high-end industrial composite systems.

According to our research, the carbon fiber composite sizing agent industry represents

a highly specialized, high-value-added interfacial chemistry segment characterized by relatively small market volume but exceptionally high technical barriers. The strategic value of sizing agents lies not in consumption volume, but in their decisive impact on final composite performance, including interfacial adhesion, resin wettability, impregnation efficiency, fatigue durability, and downstream processing stability. From a product technology perspective, sizing systems have become increasingly application-specific, especially in aerospace, hydrogen storage vessels, and advanced thermoplastic composites where different resin systems require customized interfacial engineering solutions. High-end customers generally adopt long qualification and certification cycles, resulting in strong customer stickiness, high switching costs, and significant technical entry barriers. From the supply-side perspective, the number of companies capable of commercial-scale development and manufacturing of advanced carbon fiber sizing systems remains very limited compared with the broader composite chemicals industry, with the market historically dominated by a small group of Japanese, American, and European suppliers.

From the demand structure perspective, wind energy large-tow carbon fiber, hydrogen storage pressure vessels, and thermoplastic composites are becoming the three fastest-growing application segments. The trend toward larger wind turbine blades is accelerating demand for low-cost industrial carbon fibers and highly wettable, fatigue-resistant sizing systems. Meanwhile, hydrogen storage applications are driving demand for high-strength, pressure-resistant, and highly stable interfacial chemistries. In addition, the increasing penetration of thermoplastic composites is significantly raising the importance of sizing systems compatible with high-temperature engineering resins such as PEEK and PPS. According to our research, the industry growth model is gradually shifting away from its historical dependence on aerospace demand toward a more diversified structure driven by wind energy industrialization, hydrogen economy expansion, and thermoplastic composite upgrading. Demand growth is also increasingly shifting from North America and Europe toward China and broader Asian industrial markets.

From a regional competition standpoint, Japanese suppliers continue to dominate the global high-end aerospace-grade and advanced thermoplastic composite sizing market, particularly in areas such as interfacial stability, fatigue resistance, and resin compatibility. American companies primarily benefit from close integration with aerospace composite and prepreg supply chains, while European players are more focused on specialty composite chemistry and industrial-grade applications. China has rapidly emerged as a growing regional supply hub in recent years, driven not only by large-scale carbon fiber capacity expansion but also by accelerating localization of

sizing systems. According to our research, Chinese suppliers are transitioning from laboratory-scale and captive support roles toward industrialized and commercialized production models, with several companies already capable of supplying industrial-grade and wind-energy-grade sizing systems. However, gaps remain in aerospace qualification capability, high-end thermoplastic systems, and long-term interfacial durability compared with established global leaders.

From an industry dynamics perspective, global capital expenditure across the carbon fiber value chain has increasingly shifted toward Asia, particularly China, where aggressive investments in wind energy, hydrogen storage vessels, and industrial composites are driving demand for both carbon fibers and associated interface materials. At the same time, the development of thermoplastic composites, eVTOL platforms, electric aviation, and next-generation lightweight transportation systems is significantly increasing the strategic importance of advanced interfacial engineering. Industry participants are increasingly emphasizing integrated “fiber-resin-interface” co-design strategies rather than focusing solely on standalone fiber performance optimization. Future competition is expected to concentrate on high-temperature thermoplastic compatibility, rapid processing capability, low-VOC waterborne systems, and high-fatigue-life interface technologies. Overall, the carbon fiber composite sizing agent industry is expected to maintain medium-to-high growth momentum over the coming years, although the market will likely remain highly concentrated due to substantial technical barriers, long qualification cycles, and stringent customer validation requirements.

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

This report is a detailed and comprehensive analysis of the world market for Carbon Fiber Composite Sizing 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 Sizing that contribute to its increasing demand across many markets.

Highlights and key features of the study

- Global Carbon Fiber Composite Sizing total production and demand, 2021-2032, (kg)
- Global Carbon Fiber Composite Sizing total production value, 2021-2032, (USD Million)
- Global Carbon Fiber Composite Sizing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)
- Global Carbon Fiber Composite Sizing consumption by region & country, CAGR,

2021-2032 & (kg)

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

Global Carbon Fiber Composite Sizing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Carbon Fiber Composite Sizing production by Resin Compatibility, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Carbon Fiber Composite Sizing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Carbon Fiber Composite Sizing 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 Michelman, Sanyo Chemical Industries, Ltd., Toray Industries, Inc., Teijin Limited, Mitsubishi Chemical Group, Hexcel Corporation, Syensqo, Jiangsu Hengshen Co., Ltd., DAI ICHI KOGYO SEIYAKU CO., LTD., Hyosung Advanced Materials, 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 Sizing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) by manufacturer, by Resin Compatibility, 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 Sizing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon Fiber Composite Sizing Market, Segmentation by Resin Compatibility:

Epoxy-compatible Sizing

Polyurethane-compatible Sizing

Vinyl Ester Compatible Sizing

Others

Global Carbon Fiber Composite Sizing Market, Segmentation by Function:

Adhesion-enhancing Sizing

Toughness-enhancing Sizing

High-temperature-resistant Sizing

Conductive Sizing

Others

Global Carbon Fiber Composite Sizing Market, Segmentation by Thermal Performance:

Standard Thermal Stability (Td \geq 250°C)

Mid-range Thermal Stability (Td 250-300°C)

High Temperature Resistant (Td >300°C)

Global Carbon Fiber Composite Sizing Market, Segmentation by Application:

Aerospace & Defense

Energy & Power

Automotive & Transportation

Industrial Equipment

Sports & Leisure

Others

Companies Profiled:

Michelman

Sanyo Chemical Industries, Ltd.

Toray Industries, Inc.

Teijin Limited

Mitsubishi Chemical Group

Hexcel Corporation

Syensqo

Jiangsu Hengshen Co., Ltd.

DAI ICHI KOGYO SEIYAKU CO., LTD.

Hyosung Advanced Materials

SGL Carbon SE

Formosa Plastics Corporation

Beijing Zhongfang Haitian New Material Technology Co., Ltd.

Jilin Huayue Technology Co., Ltd.

Yangzhou Lihong Carbon Fiber Materials Co., Ltd.

Weihai Guangwei Composites Co., Ltd.

Zhongfu Shenying Carbon Fiber Co., Ltd.

Sinofibers Technology Co., Ltd.

Taekwang Industrial

UMATEX

Scott Bader

Key Questions Answered:

1. How big is the global Carbon Fiber Composite Sizing market?
2. What is the demand of the global Carbon Fiber Composite Sizing market?
3. What is the year over year growth of the global Carbon Fiber Composite Sizing market?
4. What is the production and production value of the global Carbon Fiber Composite Sizing market?
5. Who are the key producers in the global Carbon Fiber Composite Sizing market?
6. What are the growth factors driving the market demand?

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