

Global Carbon Fiber Composite Sizing Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Carbon Fiber Composite Sizing market size was valued at US\$ 499 million in 2025 and is forecast to a readjusted size of US\$ 879 million by 2032 with a CAGR of 8.5% during review period.

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 is a detailed and comprehensive analysis for global Carbon Fiber Composite Sizing market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Resin Compatibility and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Carbon Fiber Composite Sizing market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Carbon Fiber Composite Sizing market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Carbon Fiber Composite Sizing market size and forecasts, by Resin Compatibility and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Carbon Fiber Composite Sizing market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Carbon Fiber Composite Sizing

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Carbon Fiber Composite Sizing market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Carbon Fiber Composite Sizing market is split by Resin Compatibility and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Resin Compatibility, and by Application in terms of volume and value. This analysis can help you expand your

business by targeting qualified niche markets.

Market segment by Resin Compatibility

Epoxy-compatible Sizing

Polyurethane-compatible Sizing

Vinyl Ester Compatible Sizing

Others

Market segment by Function

Adhesion-enhancing Sizing

Toughness-enhancing Sizing

High-temperature-resistant Sizing

Conductive Sizing

Others

Market segment by Thermal Performance

Standard Thermal Stability (Td \geq 250°C)

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

High Temperature Resistant (Td $>$ 300°C)

Market segment by Application

Aerospace & Defense

Energy & Power

Automotive & Transportation

Industrial Equipment

Sports & Leisure

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Carbon Fiber Composite Sizing product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Carbon Fiber Composite Sizing, with price, sales quantity, revenue, and global market share of Carbon Fiber Composite Sizing from 2021 to 2026.

Chapter 3, the Carbon Fiber Composite Sizing competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Carbon Fiber Composite Sizing breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Resin Compatibility and by Application, with sales market share and growth rate by Resin Compatibility, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Carbon Fiber Composite Sizing market forecast, by regions, by Resin Compatibility, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Carbon Fiber Composite Sizing.

Chapter 14 and 15, to describe Carbon Fiber Composite Sizing sales channel, distributors, customers, research findings and conclusion.

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