

Global Needle-Punched Preform 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 Needle-Punched Preform market size was valued at US\$ 293 million in 2025 and is forecast to a readjusted size of US\$ 531 million by 2032 with a CAGR of 8.3% during review period.

Needle punched preforms are high temperature composite reinforcement structures manufactured using high performance continuous fibers such as carbon fiber, silicon carbide fiber, quartz fiber and oxide fiber through multilayer layup, fiber web forming, needle punching reinforcement, three dimensional reinforcement structure forming and subsequent stabilization processes. These products are primarily used for the densification and structural reinforcement of carbon carbon composites, ceramic matrix composites and other heat resistant composite systems. Needle punched composite preforms generally exhibit high interlaminar bonding strength, excellent thermal shock resistance, low density and stable high temperature performance, and can be designed into two dimensional laminated needled structures, semi structural needled architectures and three dimensional needled reinforcement structures according to different application requirements. Key technical specifications mainly include fiber volume fraction, needling density, porosity distribution, interlaminar shear strength, thickness uniformity and thermal expansion compatibility. The products are widely applied in aircraft carbon ceramic brake systems, aeroengine hot section components, aerospace thermal protection systems, solid rocket motor nozzles, high temperature furnace thermal fields and advanced friction materials. In 2025, the global needle punched composite preform industry is estimated to maintain an average gross margin of approximately 25% to 35%, while the average industry selling price is generally estimated at around USD 420 to USD 950 per square meter depending on fiber system, thickness configuration and aerospace qualification requirements, with high end

aerospace grade products exceeding USD 1,500 per square meter.

Needle punched composite preforms represent a highly specialized segment within the advanced high temperature composite materials industry, where the core value lies in the formation of stable three dimensional reinforcement architectures capable of operating under extreme thermal, mechanical and aerodynamic conditions. The global supply chain remains strongly aerospace oriented, with upstream activities concentrated in high performance carbon fibers, silicon carbide fibers, quartz fibers and oxide fibers, while midstream manufacturing focuses on needled preform production and densification compatible structures. Downstream demand is mainly driven by aircraft carbon ceramic braking systems, aeroengine hot section components, aerospace thermal protection systems and high temperature industrial thermal fields. Due to the combination of military related applications, complex manufacturing integration and long qualification cycles, the number of companies capable of industrial scale production remains relatively limited, resulting in a market characterized by customized production, high technical concentration and project based supply relationships.

The global competitive landscape is currently shaped by rapid capacity expansion in China alongside continued technological leadership in Europe and North America for high end aerospace applications. China has accelerated investment in high temperature composite materials under the combined influence of domestic aeroengine programs, hypersonic vehicle development, aerospace thermal protection projects and increasing penetration of carbon ceramic braking systems. Multiple industrial clusters are emerging around key manufacturing regions, supported by ongoing expansion projects and localized supply chain development. Western suppliers continue focusing on ceramic matrix composite applications for next generation turbine engines and aerospace braking systems, while several manufacturers maintain vertically integrated internal preform production capabilities to strengthen process confidentiality and supply chain security. At the same time, increasing requirements for lightweight structures and higher operating temperatures are driving the industry toward denser reinforcement architectures, more complex geometries and lower defect manufacturing technologies.

Over the coming years, the needle punched composite preform industry is expected to maintain solid growth momentum while remaining a relatively niche but strategically important advanced materials sector. Industry expansion will continue to depend heavily on the availability of high performance fibers, investment in densification equipment, qualification timelines and access to specialized engineering talent. Capital expenditure is increasingly directed toward silicon carbide fiber systems, automated multilayer needling technologies, advanced thermal processing infrastructure and large scale

ceramic matrix composite integration capability. In parallel, regional supply chain security strategies are encouraging additional localization of high temperature composite manufacturing capabilities across multiple countries. As aerospace propulsion systems, commercial space platforms and hypersonic technologies move into broader deployment stages, the industry is expected to evolve toward higher operating temperatures, longer service life, more sophisticated reinforcement structures and tighter manufacturing consistency, further increasing the technical barriers and value added characteristics of the sector.

This report is a detailed and comprehensive analysis for global Needle-Punched Preform market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Needle-Punched Preform market size and forecasts, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Needle-Punched Preform market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Needle-Punched Preform market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Needle-Punched Preform market shares of main players, shipments in revenue (\$ Million), sales quantity (Sq m), and ASP (US\$/Sq m), 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 Needle-Punched Preform

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 Needle-Punched Preform 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 Jiangsu Tianniao High Technology Co., Ltd., Hunan Boyun New Materials Co., Ltd., Xi'an Xinyao Ceramic Composites Co., Ltd., AVIC Composite Corporation Ltd., Nanjing Fiberglass Research & Design Institute Co., Ltd., Shaanxi Yuanfeng Textile Technology Research Co., Ltd., Safran, SGL Carbon SE, Fiber Materials Inc., GE Aerospace, etc.

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

Market Segmentation

Needle-Punched Preform market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

Carbon Fiber

Ceramic Fiber

Hybrid Fiber

Others

Market segment by Needling Density Level

Low Density?12–15?/cm??

Medium Density?22?/cm??

High Density?27–35?/cm??

Ultra-high Density?>35?/cm??

Market segment by Structure

Needled Mat (2.5D)

Fine Weave Pierced (3D)

Axial Rod Braided (4D)

Hybrid Composite

Others

Market segment by Application

Solid Rocket Motor (SRM) Nozzle

Aircraft Brake Disc

Aerospace Thermal Protection

High-temperature Furnace Hot Zone

Aeroengine Hot Section

Others

Major players covered

Jiangsu Tianniao High Technology Co., Ltd.

Hunan Boyun New Materials Co., Ltd.

Xi'an Xinyao Ceramic Composites Co., Ltd.

AVIC Composite Corporation Ltd.

Nanjing Fiberglass Research & Design Institute Co., Ltd.

Shaanxi Yuanfeng Textile Technology Research Co., Ltd.

Safran

SGL Carbon SE

Fiber Materials Inc.

GE Aerospace

CTE Carbon Composites

Sinosteel Corporation

KORCARB Co., Ltd.

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 Needle-Punched Preform product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Needle-Punched Preform, with price, sales quantity, revenue, and global market share of Needle-Punched Preform from 2021 to 2026.

Chapter 3, the Needle-Punched Preform competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Needle-Punched Preform 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 Type and by Application, with sales market share and growth rate by Type, 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 Needle-Punched Preform market forecast, by regions, by Type, 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 Needle-Punched Preform.

Chapter 14 and 15, to describe Needle-Punched Preform sales channel, distributors, customers, research findings and conclusion.

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