

Global Oxidized Polyacrylonitrile (OPAN) Fiber Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Oxidized Polyacrylonitrile (OPAN) Fiber market size is expected to reach \$ 401 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Oxidized Polyacrylonitrile (OPAN) Fiber is an inherently flame-resistant fiber produced by subjecting polyacrylonitrile precursor fiber to tension-controlled cyclization, oxidation and thermal stabilization, generally in an air or oxygen-containing atmosphere at approximately 200 to 300 degrees Celsius. During stabilization, the linear PAN molecular structure is converted into a thermally stable conjugated ladder structure. The resulting fiber does not readily support combustion, melt or drip when exposed to flame and offers low thermal conductivity, a high limiting oxygen index, dimensional stability, chemical resistance and electrical insulation.

Commercial OPAN products are supplied as continuous tow, crimped staple fiber, chopped fiber, milled fiber and recycled fiber. They can subsequently be converted into yarns, woven fabrics, needle-punched felts, wet-laid papers and composite materials. Principal applications include fire and thermal barriers, protective apparel, transportation thermal and acoustic insulation, aircraft and railway brake preforms, friction materials, high-temperature seals and filtration, as well as precursors for carbon felt, graphite felt and electrode materials. Unoxidized PAN precursor, carbon fiber, activated carbon fiber and captive oxidized intermediates that are not commercially sold are excluded.

In 2025, global Oxidized Polyacrylonitrile (OPAN) Fiber output was approximately 20,500 metric tons, the weighted-average price was approximately USD 11,800 per metric ton, and manufacturing gross margins were approximately 23% to 32%.

New-Energy Thermal Safety Is Moving OPAN From Traditional Flame Protection Toward Higher-Value Functional Materials

The global OPAN fiber market is expanding beyond conventional fire blankets, welding fabrics and high-temperature sealing materials into electric vehicles, energy storage, aircraft braking and advanced carbon materials. OPAN does not melt or drip under flame exposure and provides inherent flame resistance without relying on brominated or halogenated additives. These characteristics make it suitable for battery-module thermal barriers, aerogel-reinforced felts, transportation fire-blocking layers and protective equipment for high-temperature work. As battery-pack requirements for delaying thermal propagation become more stringent, OPAN needle-punched felts and OPAN-aerogel composites are expected to represent some of the fastest-growing downstream applications.

Competition is shifting from general flame resistance toward limiting oxygen index, fiber density, oxidation uniformity, low impurity levels, staple-fiber processability and consistency during subsequent carbonization. Aircraft carbon-brake preforms, high-performance friction materials and electrode materials require stable tow structures and tightly controlled heat treatment. Protective textiles place greater emphasis on crimp, softness, blending performance and low-smoke characteristics. Price differentiation among continuous tow, crimped staple and milled fibers is consequently expected to widen, and suppliers capable of application development, customized cutting, surface treatment and certification support will command higher project margins.

Major constraints include long stabilization cycles, relatively high energy consumption, difficulties in maintaining uniform oxidation and volatility in PAN precursor and acrylonitrile costs. OPAN also has lower mechanical strength and abrasion resistance than aramid and certain other high-performance fibers, so protective apparel commonly uses blends with aramid, flame-resistant viscose or other fibers. In insulation applications, OPAN competes with glass, silica, ceramic and flame-retardant polyester fibers. The future market is therefore expected to develop a layered structure in which a limited number of integrated producers control primary OPAN capacity, while regional companies specialize in staple conversion, recycled fiber, needle-punched felts and composite thermal-barrier materials.

This report studies the global Oxidized Polyacrylonitrile (OPAN) Fiber production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Oxidized

Polyacrylonitrile (OPAN) Fiber 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 Oxidized Polyacrylonitrile (OPAN) Fiber that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Oxidized Polyacrylonitrile (OPAN) Fiber total production and demand, 2021-2032, (Kilotons)
Global Oxidized Polyacrylonitrile (OPAN) Fiber total production value, 2021-2032, (USD Million)
Global Oxidized Polyacrylonitrile (OPAN) Fiber production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)
Global Oxidized Polyacrylonitrile (OPAN) Fiber consumption by region & country, CAGR, 2021-2032 & (Kilotons)
U.S. VS China: Oxidized Polyacrylonitrile (OPAN) Fiber domestic production, consumption, key domestic manufacturers and share
Global Oxidized Polyacrylonitrile (OPAN) Fiber production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)
Global Oxidized Polyacrylonitrile (OPAN) Fiber production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)
Global Oxidized Polyacrylonitrile (OPAN) Fiber production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Oxidized Polyacrylonitrile (OPAN) Fiber 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 ZOLTEK Corporation, SGL Carbon SE, Teijin Limited, Multiv?cuo Aeroespacial, Lanzhou Bluestar Fiber Co., Ltd., Jiangsu Wanrun New Material Technology Co., Ltd., 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 Oxidized Polyacrylonitrile (OPAN) Fiber market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, 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 Oxidized Polyacrylonitrile (OPAN) Fiber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Oxidized Polyacrylonitrile (OPAN) Fiber Market, Segmentation by Type:

Continuous Tow

Crimped Staple Fiber

Chopped and Milled Fiber

Recycled OPAN Fiber

Others

Global Oxidized Polyacrylonitrile (OPAN) Fiber Market, Segmentation by Limiting Oxygen Index:

40%-45%

45%-50%

50%-55%

55%-60%

≥60%

Global Oxidized Polyacrylonitrile (OPAN) Fiber Market, Segmentation by Fiber Fineness:

≤1.7 dtex

1.7 dtex-2.2 dtex

2.2 dtex-5.0 dtex

≥5.0 dtex

Global Oxidized Polyacrylonitrile (OPAN) Fiber Market, Segmentation by Application:

Thermal and Fire Barriers

Friction and Brake Materials

Carbon and Graphite Material Precursors

Protective Textiles

Others

Companies Profiled:

ZOLTEK Corporation

SGL Carbon SE

Teijin Limited

Multiv?cuo Aeroespacial

Lanzhou Bluestar Fiber Co., Ltd.

Jiangsu Wanrun New Material Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Oxidized Polyacrylonitrile (OPAN) Fiber market?
2. What is the demand of the global Oxidized Polyacrylonitrile (OPAN) Fiber market?
3. What is the year over year growth of the global Oxidized Polyacrylonitrile (OPAN) Fiber market?
4. What is the production and production value of the global Oxidized Polyacrylonitrile (OPAN) Fiber market?
5. Who are the key producers in the global Oxidized Polyacrylonitrile (OPAN) Fiber market?
6. What are the growth factors driving the market demand?

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