

Global Polyacrylonitrile Based (PAN) Carbon Fiber Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyacrylonitrile Based (PAN) Carbon Fiber market size is expected to reach \$ 6345 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Polyacrylonitrile Based (PAN) Carbon Fiber is a high-performance fibrous material produced from carbon-fiber-grade PAN precursor through oxidative stabilization in air, low- and high-temperature carbonization in an inert atmosphere, and, where required, graphitization, surface treatment, sizing and winding. Its carbon content is generally at least 92%, while individual filaments typically measure approximately 5 to 10 micrometers in diameter. Thousands or tens of thousands of filaments are bundled into continuous tows such as 1K, 3K, 12K, 24K, 48K, 50K and larger formats.

PAN-based carbon fiber combines low density with high specific strength, high specific modulus, fatigue resistance, corrosion resistance, electrical conductivity, low thermal expansion and high-temperature stability. It is primarily used as reinforcement in polymer-matrix, carbon-matrix, ceramic-matrix and metal-matrix composites. Product performance is determined by precursor defects, molecular orientation, stabilization uniformity, carbonization temperature, graphitic microstructure, surface activity and sizing chemistry. The scope excludes PAN precursor, oxidized PAN fiber, pitch-based carbon fiber, recycled carbon fiber, carbon-fiber fabrics, prepregs and finished composite components. Global Polyacrylonitrile Based (PAN) Carbon Fiber shipments were approximately 216,000 metric tons in 2025, with a weighted average equivalent FOB price of approximately USD 16,000 per metric ton and a gross margin of approximately 15% to 30%.

The PAN-based carbon-fiber market is evolving from a high-value niche material

dominated by aerospace and sporting goods toward large-scale deployment in wind energy, pressure vessels, transportation equipment and industrial structural components. Demand for lightweight and rigid spar caps in larger wind-turbine blades, expansion of high-pressure hydrogen and natural-gas cylinders, recovery in commercial-aircraft production and lightweight structures for unmanned and low-altitude aircraft are major growth drivers. Robotic structures, rollers, drive shafts, offshore engineering, structural reinforcement and high-end electronic equipment are also extending the industrial application boundary.

The market is developing a more pronounced two-track structure. The first route comprises lower-cost industrial products represented by 48K, 50K and 60K large tows. Producers are increasing single-line capacity, reducing energy consumption and expanding pultrusion, filament-winding and compression-molding applications in wind energy, automotive and infrastructure. The second route comprises high-strength intermediate-modulus and high-modulus products equivalent to T800, T1100, M40J and higher grades for aerospace, defense, low-altitude aircraft and advanced pressure vessels. Procurement criteria are shifting from nominal product grades toward variation in strength and modulus, fuzz rates, sizing compatibility, composite conversion yield and long-term batch consistency.

Major risks include temporary overcapacity in commodity grades, aggressive pricing and low plant utilization. China has established the world's largest carbon-fiber production capacity, although some large-tow and standard-modulus lines remain under profitability pressure. High-end products continue to face lengthy qualification cycles, high equipment investment, strict aerospace supply-chain entry requirements and intellectual-property barriers. Energy costs, acrylonitrile prices, export controls and supply-chain localization will also reshape regional competition. Future competitiveness will depend less on nominal capacity and more on precursor quality, stable carbonization, low-cost manufacturing, specialized sizing, application development and recycling capabilities.

This report studies the global Polyacrylonitrile Based (PAN) Carbon Fiber production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polyacrylonitrile Based (PAN) Carbon 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 Polyacrylonitrile Based (PAN) Carbon Fiber that contribute to its increasing demand across many

markets.

Highlights and key features of the study

Global Polyacrylonitrile Based (PAN) Carbon Fiber total production and demand, 2021-2032, (Kilotons)

Global Polyacrylonitrile Based (PAN) Carbon Fiber total production value, 2021-2032, (USD Million)

Global Polyacrylonitrile Based (PAN) Carbon Fiber production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Polyacrylonitrile Based (PAN) Carbon Fiber consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Polyacrylonitrile Based (PAN) Carbon Fiber domestic production, consumption, key domestic manufacturers and share

Global Polyacrylonitrile Based (PAN) Carbon Fiber production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Polyacrylonitrile Based (PAN) Carbon Fiber production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Polyacrylonitrile Based (PAN) Carbon Fiber production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Polyacrylonitrile Based (PAN) Carbon 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 Toray Industries, Inc., Teijin Limited, Mitsubishi Chemical Corporation, Hexcel Corporation, Syensqo SA/NV, SGL Carbon SE, HS Hyosung Advanced Materials Corporation, Taekwang Industrial Co., Ltd., Aksa Karbon ve ?leri Kompozit Malzemeler San. Ltd. ?ti., UMATEX Group, 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 Polyacrylonitrile Based (PAN) Carbon 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 Polyacrylonitrile Based (PAN) Carbon Fiber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyacrylonitrile Based (PAN) Carbon Fiber Market, Segmentation by Type:

?12K

12K-24K

24K-50K

?50K

Global Polyacrylonitrile Based (PAN) Carbon Fiber Market, Segmentation by Target Carbon Fiber Grade:

Standard-Modulus Grade

High-Strength Standard-Modulus Grade

High-Strength Intermediate-Modulus Grade

High-Modulus Grade

Others

Global Polyacrylonitrile Based (PAN) Carbon Fiber Market, Segmentation by Tensile Strength:

?4.5 GPa

4.5-5.5 GPa

5.5-6.5 GPa

?6.5 GPa

Global Polyacrylonitrile Based (PAN) Carbon Fiber Market, Segmentation by Application:

Aerospace and Defense

Wind Energy

Pressure Vessels and Hydrogen Storage

Automotive, Sports and General Industry

Others

Companies Profiled:

Toray Industries, Inc.

Teijin Limited

Mitsubishi Chemical Corporation

Hexcel Corporation

Syensqo SA/NV

SGL Carbon SE

HS Hyosung Advanced Materials Corporation

Taekwang Industrial Co., Ltd.

Aksa Karbon ve ?leri Kompozit Malzemeler San. Ltd. ?ti.

UMATEX Group

Zhongfu Shenying Carbon Fiber Co., Ltd.

Weihai Guangwei Composites Co., Ltd.

Jiangsu Hengshen Co., Ltd.

Sinopec Shanghai Petrochemical Company Limited

Jilin Chemical Fibre Co., Ltd.

Sinofibers Technology Co., Ltd.

Newtech Group Co., Ltd.

Lanzhou Bluestar Fibres Co., Ltd.

Shanxi Gangke Carbon Materials Co., Ltd.

Xinjiang Longju New Materials Co., Ltd.

Formosa Plastics Corporation

Key Questions Answered:

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

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