

Global Polyacrylonitrile Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyacrylonitrile market size is expected to reach \$ 7119 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032). Global polyacrylonitrile sales reached 2.23 million tons in 2025, with an average price of US\$2,342 per ton.

Polyacrylonitrile is a semicrystalline synthetic polymer resin (acrylic resin). Commonly abbreviated as PAN, Polyacrylonitrile's empirical formula is $(C_3H_4N)_n$. It is a hard rigid thermoplastic material that is resistant to most solvents and chemicals, slow to burn and has low permeability to gases. Polyacrylonitrile can also be carbonized for battery applications.

Global Polyacrylonitrile (PAN) key players include AKSA, Montefibre, Dralon, Mitsubishi Rayon Group, TAF, etc. Global top five manufacturers hold a share over 25%. China is the largest market, with a share over 35%, followed by Europe, and Japan, both have a share about 40 percent. In terms of product, Acrylic Staple Fiber is the largest segment, with a share about 56%. And in terms of application, the largest application is Filtration, followed by Textiles, Fiber-reinforced concrete, carbon fiber, etc.

The supply of raw materials for polyacrylonitrile exhibits significant dependence on petrochemicals and is technology-intensive, resulting in a cost structure that varies considerably depending on product grade. Raw material costs account for 65-70% of the total cost, with acrylonitrile monomer accounting for the largest share (approximately 50-55%). Acrylonitrile prices are directly affected by fluctuations in oil and natural gas prices, with an average price of approximately 12,000-15,000 yuan/ton in 2024. Solvents (DMF, DMSO, etc.) account for 10-15%, while initiators, chain transfer agents, and other auxiliaries account for 5-10%. Energy and equipment costs account for 15-20%. The polymerization reaction requires precise control of temperature (60-80?)

and stirring speed. Solution polymerization technology is mature, but solvent recovery is energy-intensive. Notably, through large-scale production, the production cost of carbon fiber can be reduced from \$9.88/kg to \$2.03/kg, a reduction of 79.5%. The processing and manufacturing cost accounts for approximately 10-15%, including multiple processes such as polymerization, monomer removal, defoaming, spinning, washing, stretching, drying, and heat setting. The quality of the PAN precursor fiber directly determines the carbon fiber performance ('what kind of fiber, what kind of carbon'), requiring extremely high process control. Quality control and testing costs account for 5-10%, requiring testing of indicators such as molecular weight distribution, residual monomer content, fiber fineness, strength, and modulus. Overall, polyacrylonitrile (PA) is a mid-priced polymer material with significant economies of scale and high downstream added value. Its cost structure is influenced by multiple factors, including acrylonitrile price fluctuations, energy costs, the level of large-scale production, and downstream applications (acrylic fiber vs. carbon fiber). China holds a dominant position globally due to its complete petrochemical industry chain and production capacity advantages, but it still lags behind Japan and the United States in the quality and cost of high-performance carbon fiber-grade PAN.

This report studies the global Polyacrylonitrile production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Polyacrylonitrile total production and demand, 2021-2032, (MT)

Global Polyacrylonitrile total production value, 2021-2032, (USD Million)

Global Polyacrylonitrile production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)

Global Polyacrylonitrile consumption by region & country, CAGR, 2021-2032 & (MT)

U.S. VS China: Polyacrylonitrile domestic production, consumption, key domestic manufacturers and share

Global Polyacrylonitrile production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)

Global Polyacrylonitrile production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Polyacrylonitrile production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Polyacrylonitrile 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 Akxa Carbon, Mitsubishi Chemical, Aditya Birla Group, Formosa M, Japan Exlan, Taekwang, Toray, Kaltex, Pasupati Acrylon, SGL Carbon, 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 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/Kg) 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 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyacrylonitrile Market, Segmentation by Type:

Acrylic Staple Fiber

Acrylic Tow

Others

Global Polyacrylonitrile Market, Segmentation by Polymerization Processes:

Solution Polymerization

Aqueous Suspension Polymerization

Emulsion Polymerization

Global Polyacrylonitrile Market, Segmentation by Copolymer Modification:

Homopolymer PAN

Copolymer PAN

Global Polyacrylonitrile Market, Segmentation by Application:

Textiles

Precursors to carbon fiber

Fiber-reinforced concrete

Others

Companies Profiled:

Aksa Carbon

Mitsubishi Chemical

Aditya Birla Group

Formosa M

Japan Exlan

Taekwang

Toray

Kaltex

Pasupati Acrylon

SGL Carbon

Sudamericana De Fibras

Indian Acrylics

Sinopec

Jilin Chemical Fiber

CNPC

Ningbo Zhongxin Acrylic Fibers

Key Questions Answered:

1. How big is the global Polyacrylonitrile market?
2. What is the demand of the global Polyacrylonitrile market?
3. What is the year over year growth of the global Polyacrylonitrile market?

4. What is the production and production value of the global Polyacrylonitrile market?
5. Who are the key producers in the global Polyacrylonitrile market?
6. What are the growth factors driving the market demand?

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