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

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Abstracts

The global Polyacrylonitrile (PAN) Precursor for Carbon Fiber market size is expected to reach $ 2968 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

Polyacrylonitrile (PAN) Precursor for Carbon Fiber is a continuous white-fiber tow produced mainly from acrylonitrile with small quantities of comonomers through polymerization, dope preparation, wet spinning or dry-jet wet spinning, coagulation, washing, drawing, drying, surface finishing and winding. It is the direct precursor material used before oxidative stabilization, low-temperature carbonization, high-temperature carbonization and surface treatment. The scope excludes conventional textile acrylic fiber, PAN resin, oxidized PAN fiber and finished carbon fiber.

The molecular weight and distribution, comonomer composition, molecular-chain orientation, filament fineness, internal voids, surface defects, residual solvent, impurity content and tow uniformity of the precursor determine the stabilization exothermic window, carbon yield, filament-breakage rate and the strength, modulus and property dispersion of the resulting carbon fiber. Carbon-fiber-grade PAN precursor is therefore a performance-critical intermediate rather than a conventional acrylic textile fiber. In 2025, the global production of Polyacrylonitrile (PAN) Precursor for Carbon Fiber is estimated at 330,000 tons, with a price of approximately US$4,600 per ton and a gross margin of approximately 16% to 30%.
Global carbon-fiber demand is expanding beyond aerospace and sporting goods into wind-turbine blades, high-pressure hydrogen vessels, compressed-natural-gas cylinders, low-altitude aircraft, automotive lightweighting, robotic structural components and industrial equipment. PAN precursor controls defect inheritance, achievable strength and carbonization stability and is one of the most technically demanding stages

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of the carbon-fiber value chain. The adoption of carbon-fiber spar caps in larger wind blades, growth in high-pressure hydrogen storage and material upgrades in commercial aviation and unmanned aircraft will support parallel growth in low-cost large-tow precursor and high-performance dry-jet wet-spun precursor.

Customer qualification is shifting from nominal T300 or T700 grades and tow counts toward filament-diameter distribution, linear-density variation, fuzz and filament-breakage rates, residual solvents, metallic impurities, finish content, boiling-water shrinkage, stabilization exothermic behavior and actual carbon yield. Carbon-fiber manufacturers are expected to strengthen vertical integration between precursor and carbonization operations and lock in polymer formulations and spinning parameters through long-term joint development. For independent precursor suppliers, repeatable compatibility with a customer's stabilization ovens and carbonization lines will carry greater commercial value than laboratory-scale peak properties.

The principal risks include temporary overcapacity in commodity large-tow precursor, aggressive pricing and low utilization at downstream carbon-fiber plants. High-end precursor remains constrained by polymerization uniformity, micro-defect control, lengthy aerospace qualification and intellectual-property barriers. Micron-scale defects can be amplified during drawing and carbonization and reduce the performance of an entire tow. Volatility in acrylonitrile, solvent, steam and electricity costs, together with solvent-recovery and wastewater-treatment requirements, will continue to affect production economics. Alternative precursors based on lignin, polyethylene and textile-grade PAN remain under development, and carbon-fiber-grade PAN is expected to retain its dominant position over the foreseeable future.

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

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

Highlights and key features of the study

Global Polyacrylonitrile (PAN) Precursor for Carbon Fiber total production and demand,

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

This report profiles key players in the global Polyacrylonitrile (PAN) Precursor for 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, HS Hyosung Advanced Materials Corporation, Taekwang Industrial Co., Ltd., Aksa Karbon Ve ?leri Kompozit Malzemeler San. Ltd. ?ti., UMATEX JSC, Jilin Tangu Carbon Fiber 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 Polyacrylonitrile (PAN) Precursor for 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.

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Global Polyacrylonitrile (PAN) Precursor for Carbon Fiber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

?12K

12K-24K

24K-50K

?50K

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

Standard-Modulus Grade

High-Strength Standard-Modulus Grade

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High-Strength Intermediate-Modulus Grade

High-Modulus Grade

Others

Global Polyacrylonitrile (PAN) Precursor for Carbon Fiber Market, Segmentation by Spinning Process:

Wet Spinning

Dry-Jet Wet Spinning

Dry Spinning

Others

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

Wind Energy

Aerospace and Defense

Pressure Vessels and Transportation

Sports, Leisure and General Industry

Others

Companies Profiled:

Toray Industries, Inc.

Teijin Limited

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Mitsubishi Chemical Corporation

Hexcel Corporation

Syensqo SA

HS Hyosung Advanced Materials Corporation

Taekwang Industrial Co., Ltd.

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

UMATEX JSC

Jilin Tangu Carbon Fiber Co., Ltd.

Zhongfu Shenying Carbon Fiber Co., Ltd.

Weihai Guangwei Composites Co., Ltd.

Jiangsu Hengshen Co., Ltd.

Sinopec Shanghai Petrochemical Company Limited

Lanzhou Bluestar Fibres Co., Ltd.

Newtech Group Co., Ltd.

Zhejiang Jinggong Carbon Materials Technology Co., Ltd.

Sinofibers Technology Co., Ltd.

Formosa Plastics Corporation

Key Questions Answered:
1. How big is the global Polyacrylonitrile (PAN) Precursor for Carbon Fiber market?
2. What is the demand of the global Polyacrylonitrile (PAN) Precursor for Carbon Fiber market?

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

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