

Global Thermosetting Direct Roving Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermosetting Direct Roving market size is expected to reach \$ 3944 million by 2032, rising at a market growth of 2.0% CAGR during the forecast period (2026-2032).

Thermosetting direct roving is an untwisted continuous fiberglass roving made by gathering continuous glass filaments, applying a thermoset-compatible sizing system and winding the strand onto packages. It is mainly designed for unsaturated polyester, vinyl ester, epoxy, phenolic and polyurethane resin systems. Key upstream materials include silica sand, pyrophyllite, limestone, boron minerals, soda ash, kaolin, alumina, silane coupling agents, epoxy or polyurethane film formers, lubricants and thermoset-compatible sizing formulations. The product is valued for low fuzz, stable tension, fast wet-out, resin bonding and mechanical performance. It is widely used in pultrusion, filament winding, weaving, knitting, prepregs, vacuum infusion and composite reinforcement, with downstream applications in pipes, tanks, pressure vessels, construction profiles, wind blades, marine, rail transit, industrial equipment, insulation components and corrosion-resistant composites.

In 2025, global thermosetting direct roving production reached approximately 4 million tons, with an average global market price is \$800 per ton.

From a global industry perspective, thermosetting direct roving is a core base material for continuous-fiber-reinforced thermoset composites. Compared with assembled roving, direct roving is generally supplied as a single-end continuous package, offering more stable unwinding tension, lower fuzz and better fiber-orientation consistency, making it particularly suitable for pultrusion, filament winding, weaving and other continuous reinforcement processes. Johns Manville describes direct roving as single-

end roving and states that direct roving for thermoset composites is used in pultrusion and woven fiberglass fabrics, with silane-based sizing to ensure compatibility with thermosets such as UP, VE and epoxy resins. Therefore, the value of this product is not limited to fiberglass strength; it directly affects resin impregnation, laminate quality, part strength, production efficiency and long-term durability.

In terms of industry trends, thermosetting direct roving is moving toward higher strength, more stable tex, faster wet-out, lower fuzz, fewer breaks, uniform unwinding, resin-specific sizing and higher glass-content processing compatibility. Traditional direct rovings focused mainly on tensile strength, linear density and price, while customers in pultruded profiles, filament-wound pipes and tanks, wind components, marine composites and multiaxial fabrics increasingly evaluate sizing formulation, unwinding tension, filament damage control, resin penetration speed, package formation and batch consistency. 3B Fibreglass describes direct rovings as continuous filaments bonded into a single strand and wound onto a bobbin, suitable for composite processes such as filament winding, pultrusion, knitting, weaving, texturisation and long-fiber technologies.

The main growth drivers come from three areas. First, pultruded profiles, gratings, composite rebar, cable trays, window and door profiles, electrical insulation parts, pipes, tanks and infrastructure composites continue to require high-strength, corrosion-resistant, dimensionally stable and continuously processable fiberglass reinforcement. Second, wind turbine blades, marine composites, pressure vessels, high-pressure pipes, rail transit and industrial structural parts are raising requirements for lightweighting, load-bearing capability and fatigue resistance, pushing direct roving toward higher strength, faster wet-out and stronger consistency. Third, downstream composite manufacturers increasingly focus on automation efficiency, mold turnover, resin wet-out speed, glass loading, laminate-defect control and batch stability, turning thermosetting direct roving from an ordinary fiberglass roving into a critical intermediate material affecting thermoset composite strength, appearance, processing efficiency and long-term reliability.

This report studies the global Thermosetting Direct Roving production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Thermosetting Direct Roving total production and demand, 2021-2032, (Kilotons)

Global Thermosetting Direct Roving total production value, 2021-2032, (USD Million)

Global Thermosetting Direct Roving production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Thermosetting Direct Roving consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Thermosetting Direct Roving domestic production, consumption, key domestic manufacturers and share

Global Thermosetting Direct Roving production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Thermosetting Direct Roving production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Thermosetting Direct Roving production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Thermosetting Direct Roving 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 China Jushi, Praana Group (Owens Corning), Saint-Gobain Vetrotex, Nippon Electric Glass, Taishan Fiberglass, CPIC, AGY Holding Corp., Valmiera Glass Group, Johns Manville, Taiwan Glass 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 Thermosetting Direct Roving 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 Thermosetting Direct Roving Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermosetting Direct Roving Market, Segmentation by Type:

Unsaturated Polyester Resin Matrix

Vinyl Ester Resin Matrix

Epoxy Resin Matrix

Others

Global Thermosetting Direct Roving Market, Segmentation by Glass Composition:

E-glass

ECR-glass

AR-glass

Others

Global Thermosetting Direct Roving Market, Segmentation by Linear Density:

Below 1200tex

1200?2400tex

2400tex and Above

Global Thermosetting Direct Roving Market, Segmentation by Application:

Construction and Infrastructure

Pipes and Tanks

Transportation

Industrial Equipment

Others

Companies Profiled:

China Jushi

Praana Group (Owens Corning)

Saint-Gobain Vetrotex

Nippon Electric Glass

Taishan Fiberglass

CPIC

AGY Holding Corp.

Valmiera Glass Group

Johns Manville

Taiwan Glass Group

3B Fibreglass

Sichuan Weibo New Material Group

Shandong Fiberglass Group

Key Questions Answered:

1. How big is the global Thermosetting Direct Roving market?
2. What is the demand of the global Thermosetting Direct Roving market?
3. What is the year over year growth of the global Thermosetting Direct Roving market?
4. What is the production and production value of the global Thermosetting Direct Roving market?
5. Who are the key producers in the global Thermosetting Direct Roving market?
6. What are the growth factors driving the market demand?

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