

Global Needle-Punched Preform Market Growth 2026-2032

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Abstracts

The global Needle-Punched Preform market size is predicted to grow from US\$ 279 million in 2025 to US\$ 520 million in 2032; it is expected to grow at a CAGR of 8.8% from 2026 to 2032.

Needle punched preforms are high temperature composite reinforcement structures manufactured using high performance continuous fibers such as carbon fiber, silicon carbide fiber, quartz fiber and oxide fiber through multilayer layup, fiber web forming, needle punching reinforcement, three dimensional reinforcement structure forming and subsequent stabilization processes. These products are primarily used for the densification and structural reinforcement of carbon carbon composites, ceramic matrix composites and other heat resistant composite systems. Needle punched composite preforms generally exhibit high interlaminar bonding strength, excellent thermal shock resistance, low density and stable high temperature performance, and can be designed into two dimensional laminated needled structures, semi structural needled architectures and three dimensional needled reinforcement structures according to different application requirements. Key technical specifications mainly include fiber volume fraction, needling density, porosity distribution, interlaminar shear strength, thickness uniformity and thermal expansion compatibility. The products are widely applied in aircraft carbon ceramic brake systems, aeroengine hot section components, aerospace thermal protection systems, solid rocket motor nozzles, high temperature furnace thermal fields and advanced friction materials. In 2025, the global needle punched composite preform industry is estimated to maintain an average gross margin of approximately 25% to 35%, while the average industry selling price is generally estimated at around USD 420 to USD 950 per square meter depending on fiber system, thickness configuration and aerospace qualification requirements, with high end aerospace grade products exceeding USD 1,500 per square meter.

Needle punched composite preforms represent a highly specialized segment within the advanced high temperature composite materials industry, where the core value lies in the formation of stable three dimensional reinforcement architectures capable of operating under extreme thermal, mechanical and aerodynamic conditions. The global supply chain remains strongly aerospace oriented, with upstream activities concentrated in high performance carbon fibers, silicon carbide fibers, quartz fibers and oxide fibers, while midstream manufacturing focuses on needled preform production and densification compatible structures. Downstream demand is mainly driven by aircraft carbon ceramic braking systems, aeroengine hot section components, aerospace thermal protection systems and high temperature industrial thermal fields. Due to the combination of military related applications, complex manufacturing integration and long qualification cycles, the number of companies capable of industrial scale production remains relatively limited, resulting in a market characterized by customized production, high technical concentration and project based supply relationships.

The global competitive landscape is currently shaped by rapid capacity expansion in China alongside continued technological leadership in Europe and North America for high end aerospace applications. China has accelerated investment in high temperature composite materials under the combined influence of domestic aeroengine programs, hypersonic vehicle development, aerospace thermal protection projects and increasing penetration of carbon ceramic braking systems. Multiple industrial clusters are emerging around key manufacturing regions, supported by ongoing expansion projects and localized supply chain development. Western suppliers continue focusing on ceramic matrix composite applications for next generation turbine engines and aerospace braking systems, while several manufacturers maintain vertically integrated internal preform production capabilities to strengthen process confidentiality and supply chain security. At the same time, increasing requirements for lightweight structures and higher operating temperatures are driving the industry toward denser reinforcement architectures, more complex geometries and lower defect manufacturing technologies.

Over the coming years, the needle punched composite preform industry is expected to maintain solid growth momentum while remaining a relatively niche but strategically important advanced materials sector. Industry expansion will continue to depend heavily on the availability of high performance fibers, investment in densification equipment, qualification timelines and access to specialized engineering talent. Capital expenditure is increasingly directed toward silicon carbide fiber systems, automated multilayer needling technologies, advanced thermal processing infrastructure and large scale ceramic matrix composite integration capability. In parallel, regional supply chain

security strategies are encouraging additional localization of high temperature composite manufacturing capabilities across multiple countries. As aerospace propulsion systems, commercial space platforms and hypersonic technologies move into broader deployment stages, the industry is expected to evolve toward higher operating temperatures, longer service life, more sophisticated reinforcement structures and tighter manufacturing consistency, further increasing the technical barriers and value added characteristics of the sector.

LP Information, Inc. (LPI) ' newest research report, the ?Needle-Punched Preform Industry Forecast? looks at past sales and reviews total world Needle-Punched Preform sales in 2025, providing a comprehensive analysis by region and market sector of projected Needle-Punched Preform sales for 2026 through 2032. With Needle-Punched Preform sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Needle-Punched Preform industry.

This Insight Report provides a comprehensive analysis of the global Needle-Punched Preform landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Needle-Punched Preform portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Needle-Punched Preform market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Needle-Punched Preform and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Needle-Punched Preform.

This report presents a comprehensive overview, market shares, and growth opportunities of Needle-Punched Preform market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Carbon Fiber

Ceramic Fiber

Hybrid Fiber

Others

Segmentation by Needling Density Level:

Low Density?12?15?/cm??

Medium Density?22?/cm??

High Density?27?35?/cm??

Ultra-high Density?>35?/cm??

Segmentation by Structure:

Needled Mat (2.5D)

Fine Weave Pierced (3D)

Axial Rod Braided (4D)

Hybrid Composite

Others

Segmentation by Application:

Solid Rocket Motor (SRM) Nozzle

Aircraft Brake Disc

Aerospace Thermal Protection

High-temperature Furnace Hot Zone

Aeroengine Hot Section

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Jiangsu Tianniao High Technology Co., Ltd.

Hunan Boyun New Materials Co., Ltd.

Xi'an Xinyao Ceramic Composites Co., Ltd.

AVIC Composite Corporation Ltd.

Nanjing Fiberglass Research & Design Institute Co., Ltd.

Shaanxi Yuanfeng Textile Technology Research Co., Ltd.

Safran

SGL Carbon SE

Fiber Materials Inc.

GE Aerospace

CTE Carbon Composites

Sinosteel Corporation

KORCARB Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Needle-Punched Preform market?

What factors are driving Needle-Punched Preform market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Needle-Punched Preform market opportunities vary by end market size?

How does Needle-Punched Preform break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Needle-Punched Preform Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Needle-Punched Preform by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Needle-Punched Preform by Country/Region, 2021, 2025 & 2032
- 2.2 Needle-Punched Preform Segment by Type
 - 2.2.1 Carbon Fiber
 - 2.2.2 Ceramic Fiber
 - 2.2.3 Hybrid Fiber
 - 2.2.4 Others
 - 2.2.5 Needle-Punched Preform Sales by Type
 - 2.2.5.1 Global Needle-Punched Preform Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Needle-Punched Preform Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Needle-Punched Preform Sale Price by Type (2021-2026)
- 2.3 Needle-Punched Preform Segment by Needling Density Level
 - 2.3.1 Low Density?12?15?/cm??
 - 2.3.2 Medium Density?22?/cm??
 - 2.3.3 High Density?27?35?/cm??
 - 2.3.4 Ultra-high Density?>35?/cm??
 - 2.3.5 Needle-Punched Preform Sales by Needling Density Level
 - 2.3.5.1 Global Needle-Punched Preform Sales Market Share by Needling Density Level (2021-2026)

2.3.5.2 Global Needle-Punched Preform Revenue and Market Share by Needling Density Level (2021-2026)

2.3.5.3 Global Needle-Punched Preform Sale Price by Needling Density Level (2021-2026)

2.4 Needle-Punched Preform Segment by Structure

2.4.1 Needled Mat (2.5D)

2.4.2 Fine Weave Pierced (3D)

2.4.3 Axial Rod Braided (4D)

2.4.4 Hybrid Composite

2.4.5 Others

2.4.6 Needle-Punched Preform Sales by Structure

2.4.6.1 Global Needle-Punched Preform Sales Market Share by Structure (2021-2026)

2.4.6.2 Global Needle-Punched Preform Revenue and Market Share by Structure (2021-2026)

2.4.6.3 Global Needle-Punched Preform Sale Price by Structure (2021-2026)

2.5 Needle-Punched Preform Segment by Application

2.5.1 Solid Rocket Motor (SRM) Nozzle

2.5.2 Aircraft Brake Disc

2.5.3 Aerospace Thermal Protection

2.5.4 High-temperature Furnace Hot Zone

2.5.5 Aeroengine Hot Section

2.5.6 Others

2.5.7 Needle-Punched Preform Sales by Application

2.5.7.1 Global Needle-Punched Preform Sale Market Share by Application (2021-2026)

2.5.7.2 Global Needle-Punched Preform Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Needle-Punched Preform Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Needle-Punched Preform Breakdown Data by Company

3.1.1 Global Needle-Punched Preform Annual Sales by Company (2021-2026)

3.1.2 Global Needle-Punched Preform Sales Market Share by Company (2021-2026)

3.2 Global Needle-Punched Preform Annual Revenue by Company (2021-2026)

3.2.1 Global Needle-Punched Preform Revenue by Company (2021-2026)

3.2.2 Global Needle-Punched Preform Revenue Market Share by Company (2021-2026)

- 3.3 Global Needle-Punched Preform Sale Price by Company
- 3.4 Key Manufacturers Needle-Punched Preform Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Needle-Punched Preform Product Location Distribution
 - 3.4.2 Players Needle-Punched Preform Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NEEDLE-PUNCHED PREFORM BY GEOGRAPHIC REGION

- 4.1 World Historic Needle-Punched Preform Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Needle-Punched Preform Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Needle-Punched Preform Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Needle-Punched Preform Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Needle-Punched Preform Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Needle-Punched Preform Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Needle-Punched Preform Sales Growth
- 4.4 APAC Needle-Punched Preform Sales Growth
- 4.5 Europe Needle-Punched Preform Sales Growth
- 4.6 Middle East & Africa Needle-Punched Preform Sales Growth

5 AMERICAS

- 5.1 Americas Needle-Punched Preform Sales by Country
 - 5.1.1 Americas Needle-Punched Preform Sales by Country (2021-2026)
 - 5.1.2 Americas Needle-Punched Preform Revenue by Country (2021-2026)
- 5.2 Americas Needle-Punched Preform Sales by Type (2021-2026)
- 5.3 Americas Needle-Punched Preform Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Needle-Punched Preform Sales by Region

6.1.1 APAC Needle-Punched Preform Sales by Region (2021-2026)

6.1.2 APAC Needle-Punched Preform Revenue by Region (2021-2026)

6.2 APAC Needle-Punched Preform Sales by Type (2021-2026)

6.3 APAC Needle-Punched Preform Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Needle-Punched Preform by Country

7.1.1 Europe Needle-Punched Preform Sales by Country (2021-2026)

7.1.2 Europe Needle-Punched Preform Revenue by Country (2021-2026)

7.2 Europe Needle-Punched Preform Sales by Type (2021-2026)

7.3 Europe Needle-Punched Preform Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Needle-Punched Preform by Country

8.1.1 Middle East & Africa Needle-Punched Preform Sales by Country (2021-2026)

8.1.2 Middle East & Africa Needle-Punched Preform Revenue by Country (2021-2026)

8.2 Middle East & Africa Needle-Punched Preform Sales by Type (2021-2026)

8.3 Middle East & Africa Needle-Punched Preform Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Needle-Punched Preform

10.3 Manufacturing Process Analysis of Needle-Punched Preform

10.4 Industry Chain Structure of Needle-Punched Preform

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Needle-Punched Preform Distributors

11.3 Needle-Punched Preform Customer

12 WORLD FORECAST REVIEW FOR NEEDLE-PUNCHED PREFORM BY GEOGRAPHIC REGION

12.1 Global Needle-Punched Preform Market Size Forecast by Region

12.1.1 Global Needle-Punched Preform Forecast by Region (2027-2032)

12.1.2 Global Needle-Punched Preform Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Needle-Punched Preform Forecast by Type (2027-2032)

12.7 Global Needle-Punched Preform Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Jiangsu Tianniao High Technology Co., Ltd.

13.1.1 Jiangsu Tianniao High Technology Co., Ltd. Company Information

13.1.2 Jiangsu Tianniao High Technology Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.1.3 Jiangsu Tianniao High Technology Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Jiangsu Tianniao High Technology Co., Ltd. Main Business Overview

13.1.5 Jiangsu Tianniao High Technology Co., Ltd. Latest Developments

13.2 Hunan Boyun New Materials Co., Ltd.

13.2.1 Hunan Boyun New Materials Co., Ltd. Company Information

13.2.2 Hunan Boyun New Materials Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.2.3 Hunan Boyun New Materials Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Hunan Boyun New Materials Co., Ltd. Main Business Overview

13.2.5 Hunan Boyun New Materials Co., Ltd. Latest Developments

13.3 Xi'an Xinyao Ceramic Composites Co., Ltd.

13.3.1 Xi'an Xinyao Ceramic Composites Co., Ltd. Company Information

13.3.2 Xi'an Xinyao Ceramic Composites Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.3.3 Xi'an Xinyao Ceramic Composites Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Xi'an Xinyao Ceramic Composites Co., Ltd. Main Business Overview

13.3.5 Xi'an Xinyao Ceramic Composites Co., Ltd. Latest Developments

13.4 AVIC Composite Corporation Ltd.

13.4.1 AVIC Composite Corporation Ltd. Company Information

13.4.2 AVIC Composite Corporation Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.4.3 AVIC Composite Corporation Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 AVIC Composite Corporation Ltd. Main Business Overview

13.4.5 AVIC Composite Corporation Ltd. Latest Developments

13.5 Nanjing Fiberglass Research & Design Institute Co., Ltd.

13.5.1 Nanjing Fiberglass Research & Design Institute Co., Ltd. Company Information

13.5.2 Nanjing Fiberglass Research & Design Institute Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.5.3 Nanjing Fiberglass Research & Design Institute Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Nanjing Fiberglass Research & Design Institute Co., Ltd. Main Business Overview

13.5.5 Nanjing Fiberglass Research & Design Institute Co., Ltd. Latest Developments

13.6 Shaanxi Yuanfeng Textile Technology Research Co., Ltd.

13.6.1 Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Company Information

13.6.2 Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.6.3 Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Main Business Overview

13.6.5 Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Latest Developments

13.7 Safran

13.7.1 Safran Company Information

13.7.2 Safran Needle-Punched Preform Product Portfolios and Specifications

13.7.3 Safran Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Safran Main Business Overview

13.7.5 Safran Latest Developments

13.8 SGL Carbon SE

13.8.1 SGL Carbon SE Company Information

13.8.2 SGL Carbon SE Needle-Punched Preform Product Portfolios and Specifications

13.8.3 SGL Carbon SE Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 SGL Carbon SE Main Business Overview

13.8.5 SGL Carbon SE Latest Developments

13.9 Fiber Materials Inc.

13.9.1 Fiber Materials Inc. Company Information

13.9.2 Fiber Materials Inc. Needle-Punched Preform Product Portfolios and Specifications

13.9.3 Fiber Materials Inc. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Fiber Materials Inc. Main Business Overview

13.9.5 Fiber Materials Inc. Latest Developments

13.10 GE Aerospace

13.10.1 GE Aerospace Company Information

13.10.2 GE Aerospace Needle-Punched Preform Product Portfolios and Specifications

13.10.3 GE Aerospace Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 GE Aerospace Main Business Overview

13.10.5 GE Aerospace Latest Developments

13.11 CTE Carbon Composites

13.11.1 CTE Carbon Composites Company Information

13.11.2 CTE Carbon Composites Needle-Punched Preform Product Portfolios and Specifications

13.11.3 CTE Carbon Composites Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 CTE Carbon Composites Main Business Overview

13.11.5 CTE Carbon Composites Latest Developments

13.12 Sinosteel Corporation

13.12.1 Sinosteel Corporation Company Information

13.12.2 Sinosteel Corporation Needle-Punched Preform Product Portfolios and Specifications

13.12.3 Sinosteel Corporation Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Sinosteel Corporation Main Business Overview

13.12.5 Sinosteel Corporation Latest Developments

13.13 KORCARB Co., Ltd.

13.13.1 KORCARB Co., Ltd. Company Information

13.13.2 KORCARB Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

13.13.3 KORCARB Co., Ltd. Needle-Punched Preform Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 KORCARB Co., Ltd. Main Business Overview

13.13.5 KORCARB Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Needle-Punched Preform Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Needle-Punched Preform Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Carbon Fiber

Table 4. Major Players of Ceramic Fiber

Table 5. Major Players of Hybrid Fiber

Table 6. Major Players of Others

Table 7. Global Needle-Punched Preform Sales by Type (2021-2026) & (Sq m)

Table 8. Global Needle-Punched Preform Sales Market Share by Type (2021-2026)

Table 9. Global Needle-Punched Preform Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Needle-Punched Preform Revenue Market Share by Type (2021-2026)

Table 11. Global Needle-Punched Preform Sale Price by Type (2021-2026) & (US\$/Sq m)

Table 12. Major Players of Low Density?12?15?/cm??

Table 13. Major Players of Medium Density?22?/cm??

Table 14. Major Players of High Density?27?35?/cm??

Table 15. Major Players of Ultra-high Density?>35?/cm??

Table 16. Global Needle-Punched Preform Sales by Needling Density Level (2021-2026) & (Sq m)

Table 17. Global Needle-Punched Preform Sales Market Share by Needling Density Level (2021-2026)

Table 18. Global Needle-Punched Preform Revenue by Needling Density Level (2021-2026) & (\$ million)

Table 19. Global Needle-Punched Preform Revenue Market Share by Needling Density Level (2021-2026)

Table 20. Global Needle-Punched Preform Sale Price by Needling Density Level (2021-2026) & (US\$/Sq m)

Table 21. Major Players of Needled Mat (2.5D)

Table 22. Major Players of Fine Weave Pierced (3D)

Table 23. Major Players of Axial Rod Braided (4D)

Table 24. Major Players of Hybrid Composite

Table 25. Major Players of Others

Table 26. Global Needle-Punched Preform Sales by Structure (2021-2026) & (Sq m)

- Table 27. Global Needle-Punched Preform Sales Market Share by Structure (2021-2026)
- Table 28. Global Needle-Punched Preform Revenue by Structure (2021-2026) & (\$ million)
- Table 29. Global Needle-Punched Preform Revenue Market Share by Structure (2021-2026)
- Table 30. Global Needle-Punched Preform Sale Price by Structure (2021-2026) & (US\$/Sq m)
- Table 31. Global Needle-Punched Preform Sale by Application (2021-2026) & (Sq m)
- Table 32. Global Needle-Punched Preform Sale Market Share by Application (2021-2026)
- Table 33. Global Needle-Punched Preform Revenue by Application (2021-2026) & (\$ million)
- Table 34. Global Needle-Punched Preform Revenue Market Share by Application (2021-2026)
- Table 35. Global Needle-Punched Preform Sale Price by Application (2021-2026) & (US\$/Sq m)
- Table 36. Global Needle-Punched Preform Sales by Company (2021-2026) & (Sq m)
- Table 37. Global Needle-Punched Preform Sales Market Share by Company (2021-2026)
- Table 38. Global Needle-Punched Preform Revenue by Company (2021-2026) & (\$ millions)
- Table 39. Global Needle-Punched Preform Revenue Market Share by Company (2021-2026)
- Table 40. Global Needle-Punched Preform Sale Price by Company (2021-2026) & (US\$/Sq m)
- Table 41. Key Manufacturers Needle-Punched Preform Producing Area Distribution and Sales Area
- Table 42. Players Needle-Punched Preform Products Offered
- Table 43. Needle-Punched Preform Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- Table 44. New Products and Potential Entrants
- Table 45. Market M&A Activity & Strategy
- Table 46. Global Needle-Punched Preform Sales by Geographic Region (2021-2026) & (Sq m)
- Table 47. Global Needle-Punched Preform Sales Market Share Geographic Region (2021-2026)
- Table 48. Global Needle-Punched Preform Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 49. Global Needle-Punched Preform Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Needle-Punched Preform Sales by Country/Region (2021-2026) & (Sq m)

Table 51. Global Needle-Punched Preform Sales Market Share by Country/Region (2021-2026)

Table 52. Global Needle-Punched Preform Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Needle-Punched Preform Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Needle-Punched Preform Sales by Country (2021-2026) & (Sq m)

Table 55. Americas Needle-Punched Preform Sales Market Share by Country (2021-2026)

Table 56. Americas Needle-Punched Preform Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Needle-Punched Preform Sales by Type (2021-2026) & (Sq m)

Table 58. Americas Needle-Punched Preform Sales by Application (2021-2026) & (Sq m)

Table 59. APAC Needle-Punched Preform Sales by Region (2021-2026) & (Sq m)

Table 60. APAC Needle-Punched Preform Sales Market Share by Region (2021-2026)

Table 61. APAC Needle-Punched Preform Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Needle-Punched Preform Sales by Type (2021-2026) & (Sq m)

Table 63. APAC Needle-Punched Preform Sales by Application (2021-2026) & (Sq m)

Table 64. Europe Needle-Punched Preform Sales by Country (2021-2026) & (Sq m)

Table 65. Europe Needle-Punched Preform Revenue by Country (2021-2026) & (\$ millions)

Table 66. Europe Needle-Punched Preform Sales by Type (2021-2026) & (Sq m)

Table 67. Europe Needle-Punched Preform Sales by Application (2021-2026) & (Sq m)

Table 68. Middle East & Africa Needle-Punched Preform Sales by Country (2021-2026) & (Sq m)

Table 69. Middle East & Africa Needle-Punched Preform Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Needle-Punched Preform Sales by Type (2021-2026) & (Sq m)

Table 71. Middle East & Africa Needle-Punched Preform Sales by Application (2021-2026) & (Sq m)

Table 72. Key Market Drivers & Growth Opportunities of Needle-Punched Preform

Table 73. Key Market Challenges & Risks of Needle-Punched Preform

Table 74. Key Industry Trends of Needle-Punched Preform
Table 75. Needle-Punched Preform Raw Material
Table 76. Key Suppliers of Raw Materials
Table 77. Needle-Punched Preform Distributors List
Table 78. Needle-Punched Preform Customer List
Table 79. Global Needle-Punched Preform Sales Forecast by Region (2027-2032) & (Sq m)
Table 80. Global Needle-Punched Preform Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 81. Americas Needle-Punched Preform Sales Forecast by Country (2027-2032) & (Sq m)
Table 82. Americas Needle-Punched Preform Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 83. APAC Needle-Punched Preform Sales Forecast by Region (2027-2032) & (Sq m)
Table 84. APAC Needle-Punched Preform Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 85. Europe Needle-Punched Preform Sales Forecast by Country (2027-2032) & (Sq m)
Table 86. Europe Needle-Punched Preform Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 87. Middle East & Africa Needle-Punched Preform Sales Forecast by Country (2027-2032) & (Sq m)
Table 88. Middle East & Africa Needle-Punched Preform Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 89. Global Needle-Punched Preform Sales Forecast by Type (2027-2032) & (Sq m)
Table 90. Global Needle-Punched Preform Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 91. Global Needle-Punched Preform Sales Forecast by Application (2027-2032) & (Sq m)
Table 92. Global Needle-Punched Preform Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 93. Jiangsu Tianniao High Technology Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 94. Jiangsu Tianniao High Technology Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications
Table 95. Jiangsu Tianniao High Technology Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 96. Jiangsu Tianniao High Technology Co., Ltd. Main Business
Table 97. Jiangsu Tianniao High Technology Co., Ltd. Latest Developments
Table 98. Hunan Boyun New Materials Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 99. Hunan Boyun New Materials Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications
Table 100. Hunan Boyun New Materials Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 101. Hunan Boyun New Materials Co., Ltd. Main Business
Table 102. Hunan Boyun New Materials Co., Ltd. Latest Developments
Table 103. Xi'an Xinyao Ceramic Composites Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 104. Xi'an Xinyao Ceramic Composites Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications
Table 105. Xi'an Xinyao Ceramic Composites Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 106. Xi'an Xinyao Ceramic Composites Co., Ltd. Main Business
Table 107. Xi'an Xinyao Ceramic Composites Co., Ltd. Latest Developments
Table 108. AVIC Composite Corporation Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 109. AVIC Composite Corporation Ltd. Needle-Punched Preform Product Portfolios and Specifications
Table 110. AVIC Composite Corporation Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 111. AVIC Composite Corporation Ltd. Main Business
Table 112. AVIC Composite Corporation Ltd. Latest Developments
Table 113. Nanjing Fiberglass Research & Design Institute Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 114. Nanjing Fiberglass Research & Design Institute Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications
Table 115. Nanjing Fiberglass Research & Design Institute Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 116. Nanjing Fiberglass Research & Design Institute Co., Ltd. Main Business
Table 117. Nanjing Fiberglass Research & Design Institute Co., Ltd. Latest Developments
Table 118. Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors
Table 119. Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Needle-Punched

Preform Product Portfolios and Specifications

Table 120. Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 121. Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Main Business

Table 122. Shaanxi Yuanfeng Textile Technology Research Co., Ltd. Latest Developments

Table 123. Safran Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 124. Safran Needle-Punched Preform Product Portfolios and Specifications

Table 125. Safran Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 126. Safran Main Business

Table 127. Safran Latest Developments

Table 128. SGL Carbon SE Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 129. SGL Carbon SE Needle-Punched Preform Product Portfolios and Specifications

Table 130. SGL Carbon SE Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 131. SGL Carbon SE Main Business

Table 132. SGL Carbon SE Latest Developments

Table 133. Fiber Materials Inc. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 134. Fiber Materials Inc. Needle-Punched Preform Product Portfolios and Specifications

Table 135. Fiber Materials Inc. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 136. Fiber Materials Inc. Main Business

Table 137. Fiber Materials Inc. Latest Developments

Table 138. GE Aerospace Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 139. GE Aerospace Needle-Punched Preform Product Portfolios and Specifications

Table 140. GE Aerospace Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 141. GE Aerospace Main Business

Table 142. GE Aerospace Latest Developments

Table 143. CTE Carbon Composites Basic Information, Needle-Punched Preform

Manufacturing Base, Sales Area and Its Competitors

Table 144. CTE Carbon Composites Needle-Punched Preform Product Portfolios and Specifications

Table 145. CTE Carbon Composites Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 146. CTE Carbon Composites Main Business

Table 147. CTE Carbon Composites Latest Developments

Table 148. Sinosteel Corporation Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 149. Sinosteel Corporation Needle-Punched Preform Product Portfolios and Specifications

Table 150. Sinosteel Corporation Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 151. Sinosteel Corporation Main Business

Table 152. Sinosteel Corporation Latest Developments

Table 153. KORCARB Co., Ltd. Basic Information, Needle-Punched Preform Manufacturing Base, Sales Area and Its Competitors

Table 154. KORCARB Co., Ltd. Needle-Punched Preform Product Portfolios and Specifications

Table 155. KORCARB Co., Ltd. Needle-Punched Preform Sales (Sq m), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 156. KORCARB Co., Ltd. Main Business

Table 157. KORCARB Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Needle-Punched Preform
- Figure 2. Needle-Punched Preform Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Needle-Punched Preform Sales Growth Rate 2021-2032 (Sq m)
- Figure 7. Global Needle-Punched Preform Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Needle-Punched Preform Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Needle-Punched Preform Sales Market Share by Country/Region (2025)
- Figure 10. Needle-Punched Preform Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Carbon Fiber
- Figure 12. Product Picture of Ceramic Fiber
- Figure 13. Product Picture of Hybrid Fiber
- Figure 14. Product Picture of Others
- Figure 15. Global Needle-Punched Preform Sales Market Share by Type in 2026
- Figure 16. Global Needle-Punched Preform Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Low Density?12?15?/cm??
- Figure 18. Product Picture of Medium Density?22?/cm??
- Figure 19. Product Picture of High Density?27?35?/cm??
- Figure 20. Product Picture of Ultra-high Density?>35?/cm??
- Figure 21. Global Needle-Punched Preform Sales Market Share by Needling Density Level in 2026
- Figure 22. Global Needle-Punched Preform Revenue Market Share by Needling Density Level (2021-2026)
- Figure 23. Product Picture of Needled Mat (2.5D)
- Figure 24. Product Picture of Fine Weave Pierced (3D)
- Figure 25. Product Picture of Axial Rod Braided (4D)
- Figure 26. Product Picture of Hybrid Composite
- Figure 27. Product Picture of Others
- Figure 28. Global Needle-Punched Preform Sales Market Share by Structure in 2026
- Figure 29. Global Needle-Punched Preform Revenue Market Share by Structure

(2021-2026)

Figure 30. Needle-Punched Preform Consumed in Solid Rocket Motor (SRM) Nozzle

Figure 31. Global Needle-Punched Preform Market: Solid Rocket Motor (SRM) Nozzle (2021-2026) & (Sq m)

Figure 32. Needle-Punched Preform Consumed in Aircraft Brake Disc

Figure 33. Global Needle-Punched Preform Market: Aircraft Brake Disc (2021-2026) & (Sq m)

Figure 34. Needle-Punched Preform Consumed in Aerospace Thermal Protection

Figure 35. Global Needle-Punched Preform Market: Aerospace Thermal Protection (2021-2026) & (Sq m)

Figure 36. Needle-Punched Preform Consumed in High-temperature Furnace Hot Zone

Figure 37. Global Needle-Punched Preform Market: High-temperature Furnace Hot Zone (2021-2026) & (Sq m)

Figure 38. Needle-Punched Preform Consumed in Aeroengine Hot Section

Figure 39. Global Needle-Punched Preform Market: Aeroengine Hot Section (2021-2026) & (Sq m)

Figure 40. Needle-Punched Preform Consumed in Others

Figure 41. Global Needle-Punched Preform Market: Others (2021-2026) & (Sq m)

Figure 42. Global Needle-Punched Preform Sale Market Share by Application (2025)

Figure 43. Global Needle-Punched Preform Revenue Market Share by Application in 2025

Figure 44. Needle-Punched Preform Sales by Company in 2025 (Sq m)

Figure 45. Global Needle-Punched Preform Sales Market Share by Company in 2025

Figure 46. Needle-Punched Preform Revenue by Company in 2025 (\$ millions)

Figure 47. Global Needle-Punched Preform Revenue Market Share by Company in 2025

Figure 48. Global Needle-Punched Preform Sales Market Share by Geographic Region (2021-2026)

Figure 49. Global Needle-Punched Preform Revenue Market Share by Geographic Region in 2025

Figure 50. Americas Needle-Punched Preform Sales 2021-2026 (Sq m)

Figure 51. Americas Needle-Punched Preform Revenue 2021-2026 (\$ millions)

Figure 52. APAC Needle-Punched Preform Sales 2021-2026 (Sq m)

Figure 53. APAC Needle-Punched Preform Revenue 2021-2026 (\$ millions)

Figure 54. Europe Needle-Punched Preform Sales 2021-2026 (Sq m)

Figure 55. Europe Needle-Punched Preform Revenue 2021-2026 (\$ millions)

Figure 56. Middle East & Africa Needle-Punched Preform Sales 2021-2026 (Sq m)

Figure 57. Middle East & Africa Needle-Punched Preform Revenue 2021-2026 (\$ millions)

Figure 58. Americas Needle-Punched Preform Sales Market Share by Country in 2025

Figure 59. Americas Needle-Punched Preform Revenue Market Share by Country (2021-2026)

Figure 60. Americas Needle-Punched Preform Sales Market Share by Type (2021-2026)

Figure 61. Americas Needle-Punched Preform Sales Market Share by Application (2021-2026)

Figure 62. United States Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 63. Canada Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 64. Mexico Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 65. Brazil Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 66. APAC Needle-Punched Preform Sales Market Share by Region in 2025

Figure 67. APAC Needle-Punched Preform Revenue Market Share by Region (2021-2026)

Figure 68. APAC Needle-Punched Preform Sales Market Share by Type (2021-2026)

Figure 69. APAC Needle-Punched Preform Sales Market Share by Application (2021-2026)

Figure 70. China Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 71. Japan Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 72. South Korea Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 73. Southeast Asia Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 74. India Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 75. Australia Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 76. China Taiwan Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 77. Europe Needle-Punched Preform Sales Market Share by Country in 2025

Figure 78. Europe Needle-Punched Preform Revenue Market Share by Country (2021-2026)

Figure 79. Europe Needle-Punched Preform Sales Market Share by Type (2021-2026)

Figure 80. Europe Needle-Punched Preform Sales Market Share by Application (2021-2026)

Figure 81. Germany Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 82. France Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 83. UK Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 84. Italy Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 85. Russia Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 86. Middle East & Africa Needle-Punched Preform Sales Market Share by Country (2021-2026)

Figure 87. Middle East & Africa Needle-Punched Preform Sales Market Share by Type (2021-2026)

Figure 88. Middle East & Africa Needle-Punched Preform Sales Market Share by Application (2021-2026)

Figure 89. Egypt Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 90. South Africa Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 91. Israel Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 92. Turkey Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 93. GCC Countries Needle-Punched Preform Revenue Growth 2021-2026 (\$ millions)

Figure 94. Manufacturing Cost Structure Analysis of Needle-Punched Preform in 2026

Figure 95. Manufacturing Process Analysis of Needle-Punched Preform

Figure 96. Industry Chain Structure of Needle-Punched Preform

Figure 97. Channels of Distribution

Figure 98. Global Needle-Punched Preform Sales Market Forecast by Region (2027-2032)

Figure 99. Global Needle-Punched Preform Revenue Market Share Forecast by Region (2027-2032)

Figure 100. Global Needle-Punched Preform Sales Market Share Forecast by Type (2027-2032)

Figure 101. Global Needle-Punched Preform Revenue Market Share Forecast by Type (2027-2032)

Figure 102. Global Needle-Punched Preform Sales Market Share Forecast by Application (2027-2032)

Figure 103. Global Needle-Punched Preform Revenue Market Share Forecast by Application (2027-2032)

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