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Global PAN-based Carbon Fiber and Fabrics Market Growth 2026-2032

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Abstracts

The global PAN-based Carbon Fiber and Fabrics market size is predicted to grow from US$ 9044 million in 2025 to US$ 15110 million in 2032; it is expected to grow at a CAGR of 7.8% from 2026 to 2032.

In 2024, global Carbon Fiber and Fabrics production reached 255,765 tons, with an average global market price of around US$ 33.90 per kg. PAN-based carbon fiber and fabrics refer to high-performance reinforcement materials produced from polyacrylonitrile (PAN) precursor fibers through stabilization, carbonization and graphitization processes, and subsequently formed into woven, knitted or multiaxial fabric structures. This material system offers exceptionally high specific strength, stiffness, fatigue resistance and corrosion resistance, enabling lightweight and high-strength composite solutions for aerospace, wind turbines, rail transit, sports equipment and advanced structural components. It represents a fundamental combined material platform in modern composite manufacturing.

PAN-based carbon fiber and fabrics constitute a unified high-performance material system produced from polyacrylonitrile (PAN) precursor polymers through spinning, stabilization, carbonization, graphitization and surface-treatment processes, and subsequently formed into reinforced textile structures such as plain weave, twill, satin, stitched mats, multiaxial fabrics or pultruded sheet materials. Featuring a typical filament diameter of 5–10 microns, this material system offers extremely high specific strength and stiffness, excellent fatigue resistance, corrosion resistance and thermal stability, serving as the core reinforcement platform for advanced composite applications and high-end structural components. Performance grades—including High Strength (HS), Intermediate Modulus (IM), High Modulus (HM) and Ultra-High Modulus (UHM)—are reflected consistently across both carbon fiber tow and corresponding fabric

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products. PAN-based carbon fiber and fabrics are widely used in aerospace structures, automotive lightweighting, wind turbine blades, rail transit components, civil-engineering strengthening, electronic device housings and sporting goods. In recent years, driven by global lightweighting and carbon-neutral trends, their penetration has accelerated in emerging fields such as new-energy vehicle structures, hydrogen storage and transportation vessels, and large-scale wind power blades.

The cost structure of PAN-based carbon fiber and fabrics is characterized by PAN precursor accounting for roughly 20% of total cost, manufacturing expenses—including energy consumption, oxidation and carbonization losses, solvent recovery, equipment depreciation and surface-treatment chemicals—representing around 65%, and labor contributing approximately 15%. A typical carbon-fiber production line (from precursor spinning to carbonization) provides an annual capacity of 500–1,000 tons, while integrated high-end facilities may reach 1,000–2,000 tons per line. Fabric-production capacity varies widely depending on weave architecture, width and automation level, generally ranging from several tons to several tens of tons per year. Industry gross margins typically fall between 25% and 35%, and can exceed 40% for companies with in-house precursor supply, advanced continuous equipment and high-end aerospace-grade product portfolios.

Within the industry value chain, upstream segments include acrylonitrile monomer, solvents such as DMF, auxiliaries and polymerization systems; midstream encompasses precursor fiber preparation, stabilization, carbonization, graphitization and fabric weaving; downstream extends to prepregs, molded components, pultruded structures and thermoset/thermoplastic composite products. Global production is concentrated in Japan, the United States and China, with leading companies such as Toray Industries, Mitsubishi Chemical, Teijin, Hexcel and SGL Carbon, alongside major Chinese producers including Zhongfu Shenying, Guangwei Composites and Jilin Chemical Fiber. While aerospace-grade products remain dominated by Japanese and U.S. manufacturers, Chinese companies continue to expand rapidly in industrial-grade large-tow products and mid-range structural applications such as wind turbine blades.

Looking ahead, the PAN-based carbon fiber and fabric industry will continue advancing toward higher performance, lower energy consumption, greener processes and intelligent manufacturing. Key technological directions include low-energy stabilization, short-process carbonization, bio-based PAN precursors, solvent-free polymerization, carbon-fiber recycling (rCF) and automated spreading/weaving technologies. Downstream growth will be driven by aerospace upgrades, next-generation wind blades, hydrogen-storage composite cylinders, rail-transit structures and new-energy

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vehicle chassis systems. As global competition shifts from a few dominant players to a more regionally diversified landscape, technological barriers, equipment integration capability and vertically integrated industrial-chain layouts will define the competitive edge of future market leaders.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global PAN-based Carbon Fiber and Fabrics 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 PAN-based Carbon Fiber and Fabrics portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global PAN-based Carbon Fiber and Fabrics market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PAN-based Carbon Fiber and Fabrics 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 PAN-based Carbon Fiber and Fabrics.

This report presents a comprehensive overview, market shares, and growth opportunities of PAN-based Carbon Fiber and Fabrics market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

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Small Tow

Large Tow

Segmentation by Production Process:

Dry-jet Wet Spinning

Wet Spinning

Segmentation by Sales Channel:

Direct Sales

Distribution

Segmentation by Application:

Aerospace & Military

Wind Turbine Blades

Sports & Leisure

Pressure Vessels

Molding & Composite Materials

Automotive

Carbon-Carbon Composites

Construction

Electronics & Electrical

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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

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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.

Toray Industries, Inc.

Hexcel

Jilin Chemical Fiber Group

Mitsubishi Chemical

Teijin

Hyosung Advanced Materials

SGL Carbon

Zhongfu Shenying Carbon Fiber Co.,Ltd.

Weihai Guangwei Composites Co., Ltd.

Newtech Group Co., Ltd.

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Aksa Carbon

Sinopec Shanghai Petrochemical Company Limited

Jiangsu Hengshen Co.,Ltd.

Sinofibers Technology Co., Ltd.

Formosa Plastic Group

Shanxi Gangke Carbon Materials Co., Ltd

Syensqo

UMATEX

Changsheng (Langfang) Technology Co., Ltd

Taekwang

Lanzhou Blue Star Fiber Co., Ltd

China National Petroleum Corporation Jilin Petrochemical Branch

Henan Yongmei Carbon Fiber Co., Ltd

Key Questions Addressed in this Report

What is the 10-year outlook for the global PAN-based Carbon Fiber and Fabrics market?

What factors are driving PAN-based Carbon Fiber and Fabrics market growth, globally and by region?

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

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How do PAN-based Carbon Fiber and Fabrics market opportunities vary by end market size?

How does PAN-based Carbon Fiber and Fabrics break out by Type, by Application?

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