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Global Thermoplastic Automated Fiber Placement Equipment Market Growth 2026-2032

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Abstracts

The global Thermoplastic Automated Fiber Placement Equipment market size is predicted to grow from US$ 194 million in 2025 to US$ 380 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Thermoplastic Automated Fiber Placement Equipment is an automated composite manufacturing system designed to place continuous fiber-reinforced thermoplastic prepreg tows or tapes along programmed paths on flat, curved or three-dimensional tooling surfaces. The equipment integrates material feeding, motion control, positioning, heating, compaction and tow cutting or restart functions, and typically uses laser, infrared or flash-lamp heating to rapidly soften or melt the thermoplastic matrix immediately before compaction. By coordinating heat input, placement speed, compaction pressure and fiber orientation, the system can form multilayer thermoplastic composite structures with high repeatability and, in suitable process configurations, achieve in-situ consolidation during deposition. Commercial equipment is supplied primarily in robotic and gantry configurations and may use single-tow or multi-tow placement heads. This study focuses on Thermoplastic Automated Fiber Placement Equipment used for automated manufacturing of continuous fiber-reinforced thermoplastic composite structures across aerospace, automotive, rail transit, energy, industrial manufacturing and other downstream applications.

Key Findings

Global Thermoplastic Automated Fiber Placement Equipment sales reached approximately 110 units in 2025

The global average selling price was approximately US$1.8 million per unit in 2025

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Average gross margin was estimated at approximately 28.0% in 2025

Laser heating is a major process route for high-temperature thermoplastic placement and in-situ consolidation

Aerospace remains the most technically demanding application for thermoplastic automated fiber placement systems

Market Trends

Thermoplastic Automated Fiber Placement Equipment is evolving from laboratory-oriented and customized systems toward higher-throughput, more stable and more digitally controlled industrial platforms. Equipment development is increasingly focused on accurate temperature management, closed-loop thermal control, higher placement speeds, improved compaction stability and better coordination between robot or gantry motion and the heating source. Laser heating remains important for high-performance polymers such as PEEK, PEKK and related high-temperature thermoplastics, while infrared and flash-lamp technologies provide alternatives for different material systems, cost structures and process windows. Another important direction is greater flexibility: multi-material compatibility, modular placement heads, interchangeable heating units and single-tow or multi-tow configurations allow users to adapt the same platform to different geometries and production scales. In-situ consolidation, online monitoring and process data traceability are also becoming more important as end users seek to reduce secondary consolidation steps and improve manufacturing repeatability.

Market Dynamics

Drivers

The market is primarily driven by growing demand for lightweight, high-strength and production-efficient thermoplastic composite structures. Aerospace manufacturers are pursuing faster composite processing, reduced dependence on long autoclave cycles and improved recyclability or weldability, while automotive, rail transit and industrial users are seeking automated alternatives to labor-intensive layup processes. Thermoplastic matrices can be repeatedly softened and consolidated, which makes automated placement particularly suitable for integrated heating and compaction. Increasing adoption of continuous fiber-reinforced PEEK, PEKK, PPS, PEI and other engineering thermoplastics further expands the addressable equipment base. At the

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same time, pressure to improve material utilization, repeatability and manufacturing traceability supports investment in automated placement equipment rather than manual or semi-automated production.

Restraints

High equipment cost and process complexity remain the principal constraints. A production-grade system requires coordinated control of multi-axis motion, tape or tow feeding, tension, high-power heating, compaction, temperature monitoring and software-generated placement paths, making capital expenditure substantially higher than conventional composite layup equipment. Thermoplastic processing also requires narrower thermal control windows: insufficient heating can reduce interlaminar bonding, while overheating may degrade the polymer or create surface defects. Different materials, tape widths and component geometries often require separate process development and qualification, increasing implementation time and engineering cost. For lower-volume users, the economic benefits of full automation may therefore be difficult to justify without sufficient equipment utilization.

Opportunities

The strongest opportunities are emerging in higher-productivity thermoplastic processing, large and complex structural components, and systems capable of more complete in-situ consolidation. Equipment that can maintain stable temperature and compaction at higher placement speeds may reduce subsequent press, oven or autoclave processing and improve production economics. Modular robotic systems create opportunities among research centers, tier suppliers and medium-volume manufacturers that do not require large gantry installations, while multi-tow gantry platforms remain relevant for large aerospace structures. New opportunities are also developing in hydrogen and pressure vessels, mobility structures, high-performance industrial components and localized reinforcement of thermoplastic parts. Suppliers that integrate process monitoring, automated path planning, defect detection and manufacturing data management can further increase equipment value beyond the mechanical placement function itself.

Challenges

The main technical challenge is maintaining consistent interlaminar bonding and laminate quality while increasing deposition speed. Thermal history, substrate temperature, tape quality, compaction force, tool geometry and cooling rate interact strongly during thermoplastic placement, making process stability more difficult than

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simple trajectory control. Equipment manufacturers must also handle multiple thermoplastic matrices with widely different melt temperatures and processing windows, while accommodating variations in tow width, curvature and laminate architecture. Qualification requirements are particularly demanding in aerospace and other safety-critical applications, where a new machine configuration, heating source or process parameter set may require extensive validation. Long equipment development cycles, customized project engineering and uneven downstream adoption can also create volatility in annual order intake.

Industry Chain Analysis

The upstream industry chain includes industrial robots, gantry structures, CNC and servo systems, laser or infrared heating sources, optical components, compaction rollers, tension-control devices, sensors, machine-vision systems, control software and composite material feeding components. High-performance thermoplastic prepreg tapes and tows are not part of the equipment itself, but their dimensional consistency, surface condition and resin behavior directly influence machine design and process-window development. Critical equipment value is concentrated in the integration of motion accuracy, thermal processing, placement-head design, software control and process know-how rather than in conventional mechanical fabrication alone.

Midstream manufacturers integrate placement heads, heating units, robot or gantry platforms, control systems, offline programming software and process-monitoring modules into complete AFP systems. Downstream users include aircraft and spacecraft manufacturers, automotive and rail suppliers, pressure-vessel and energy-equipment producers, research institutes and advanced industrial manufacturers. Equipment profitability depends strongly on system configuration, engineering content, software and service intensity. Large multi-tow gantry installations command higher project values, while compact robotic systems broaden access to smaller users. Lifecycle value increasingly comes from commissioning, process development, software upgrades, maintenance and application engineering rather than initial equipment delivery alone.

Segment Insights

By heating type, laser heating is particularly important for high-temperature thermoplastic matrices because it can deliver concentrated and rapidly controllable energy directly to the incoming tape and substrate interface. Infrared heating provides a relatively mature and flexible option for wider processing areas, while flash-lamp heating offers high-intensity energy input with a different balance of cost, response speed and

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integration complexity. Selection is strongly influenced by polymer melt temperature, placement speed, tow width, component geometry and the required level of in-situ consolidation, so the market is likely to maintain multiple heating technologies rather than converge on a single universal solution.

By machine configuration, robotic systems provide flexibility, smaller footprints and easier adaptation to research, development and medium-scale manufacturing, whereas gantry systems are better suited to large components, larger working envelopes and applications requiring high positional stability. By tow configuration, single-tow systems offer strong flexibility for complex paths and localized deposition, while multi-tow systems improve deposition productivity and are more attractive for larger structural components. These segmentation dimensions increasingly interact, with equipment suppliers combining different heating, motion and tow architectures to match specific production economics rather than offering one standardized platform.

Downstream Market Opportunities

Aerospace remains the most technically demanding and strategically important application because structural thermoplastic composites require high fiber-placement accuracy, low-defect laminates, strong process traceability and repeatable consolidation quality. Automotive and rail transit offer opportunities where cycle time, automation and lightweighting are more important than aerospace-grade qualification, creating demand for faster and more cost-efficient robotic systems. Energy applications, including pressure-containing and structural components, provide additional opportunities for automated continuous-fiber deposition, while industrial manufacturing is expanding into specialized machinery, high-performance structural parts and customized composite components. The most attractive applications are those where high material cost, complex fiber paths and repeat production make automation economically superior to manual layup.

Regional Insights

North America and Europe remain important technology and application centers due to their established aerospace, advanced composites and automation industries. These regions have accumulated significant experience in robotic and gantry AFP architectures, multi-tow placement heads, laser-assisted thermoplastic processing and qualification of composite manufacturing systems. Demand is concentrated in high-value aerospace and advanced industrial applications, where users place greater emphasis on process stability, software capability, application engineering and

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equipment integration rather than equipment price alone.

Asia-Pacific is becoming increasingly important as aerospace manufacturing, composite material production and domestic automation capability expand. China has developed a broader supplier base covering robotic thermoplastic placement systems, laser-assisted equipment and customized AFP platforms, while regional demand is extending beyond research institutions toward industrial manufacturing. The regional opportunity is therefore shifting from equipment localization toward performance improvement, production validation and larger-scale application. Japan and other advanced manufacturing economies also contribute demand through high-performance composite research and specialized industrial applications.

Competitive Landscape Analysis

The competitive landscape is characterized by a relatively limited number of specialized AFP equipment manufacturers, automation companies and composite-process engineering specialists. Entry barriers are higher than in conventional robotic integration because suppliers require combined expertise in composite processing, heating technology, placement-head design, multi-axis control, offline programming and application qualification. Established international manufacturers differentiate through installed-base experience, large-scale system integration, multi-tow productivity and long-term aerospace customer relationships, while emerging Chinese suppliers are increasingly competitive in robotic platforms, laser-assisted thermoplastic placement and customized system development. The market does not compete on equipment price alone: performance stability, material compatibility, heating control, placement accuracy, software capability, commissioning support and the ability to help customers establish qualified manufacturing processes are increasingly important determinants of supplier competitiveness.

Report Scope

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

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This Insight Report provides a comprehensive analysis of the global Thermoplastic Automated Fiber Placement Equipment 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 Thermoplastic Automated Fiber Placement Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thermoplastic Automated Fiber Placement Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thermoplastic Automated Fiber Placement Equipment 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 Thermoplastic Automated Fiber Placement Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Thermoplastic Automated Fiber Placement Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Laser Heating

Infrared Heating

Flash Lamp Heating

Segmentation by Machine Configuration:

Robotic Type

Gantry Type

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Segmentation by Tow Configuration:

Single-Tow

Multi-Tow

Segmentation by Application:

Aerospace

Automotive

Rail Transit

Energy

Industrial Manufacturing

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

Electroimpact

Coriolis Composites

Mikrosam

Addcomposites

Trelleborg

Accudyne Systems

Broetje-Automation

MTorres

Ingersoll Machine Tools

Coexpair Dynamics

AFPT

Genertec Qiqihar No.2 Machine Tool

Suzhou Layway Intelligent Manufacturing

ISBOT (Wuhan) Technology

Hangzhou TKS Additive Technology

Shanghai Electric

KEDAI AVIATION (SHANGHAI) EQUIPMENT

Dongjing Intelligent

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Thermoplastic Automated Fiber Placement Equipment market?

What factors are driving Thermoplastic Automated Fiber Placement Equipment market growth, globally and by region?

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

How do Thermoplastic Automated Fiber Placement Equipment market opportunities vary by end market size?

How does Thermoplastic Automated Fiber Placement Equipment break out by Type, by Application?

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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 Thermoplastic Automated Fiber Placement Equipment Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Thermoplastic Automated Fiber Placement Equipment by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Thermoplastic Automated Fiber Placement Equipment by Country/Region, 2021, 2025 & 2032
2.2 Thermoplastic Automated Fiber Placement Equipment Segment by Type
  2.2.1 Laser Heating
  2.2.2 Infrared Heating
  2.2.3 Flash Lamp Heating
  2.2.4 Thermoplastic Automated Fiber Placement Equipment Sales by Type
    2.2.4.1 Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Thermoplastic Automated Fiber Placement Equipment Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Type (2021-2026)
2.3 Thermoplastic Automated Fiber Placement Equipment Segment by Machine Configuration
  2.3.1 Robotic Type
  2.3.2 Gantry Type
  2.3.3 Thermoplastic Automated Fiber Placement Equipment Sales by Machine Configuration

+357 96 030922
info@marketpublishers.com

2.3.3.1 Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Machine Configuration (2021-2026)
2.3.3.2 Global Thermoplastic Automated Fiber Placement Equipment Revenue and Market Share by Machine Configuration (2021-2026)
2.3.3.3 Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Machine Configuration (2021-2026)
2.4 Thermoplastic Automated Fiber Placement Equipment Segment by Tow Configuration
2.4.1 Single-Tow
2.4.2 Multi-Tow
2.4.3 Thermoplastic Automated Fiber Placement Equipment Sales by Tow Configuration
2.4.3.1 Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Tow Configuration (2021-2026)
2.4.3.2 Global Thermoplastic Automated Fiber Placement Equipment Revenue and Market Share by Tow Configuration (2021-2026)
2.4.3.3 Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Tow Configuration (2021-2026)
2.5 Thermoplastic Automated Fiber Placement Equipment Segment by Application
2.5.1 Aerospace
2.5.2 Automotive
2.5.3 Rail Transit
2.5.4 Energy
2.5.5 Industrial Manufacturing
2.5.6 Other
2.5.7 Thermoplastic Automated Fiber Placement Equipment Sales by Application
2.5.7.1 Global Thermoplastic Automated Fiber Placement Equipment Sale Market Share by Application (2021-2026)
2.5.7.2 Global Thermoplastic Automated Fiber Placement Equipment Revenue and Market Share by Application (2021-2026)
2.5.7.3 Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Thermoplastic Automated Fiber Placement Equipment Breakdown Data by Company
3.1.1 Global Thermoplastic Automated Fiber Placement Equipment Annual Sales by Company (2021-2026)

+357 96 030922
info@marketpublishers.com

3.1.2 Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Company (2021-2026)
3.2 Global Thermoplastic Automated Fiber Placement Equipment Annual Revenue by Company (2021-2026)
3.2.1 Global Thermoplastic Automated Fiber Placement Equipment Revenue by Company (2021-2026)
3.2.2 Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Company (2021-2026)
3.3 Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Company
3.4 Key Manufacturers Thermoplastic Automated Fiber Placement Equipment Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Thermoplastic Automated Fiber Placement Equipment Product Location Distribution
3.4.2 Players Thermoplastic Automated Fiber Placement Equipment 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 THERMOPLASTIC AUTOMATED FIBER PLACEMENT EQUIPMENT BY GEOGRAPHIC REGION

4.1 World Historic Thermoplastic Automated Fiber Placement Equipment Market Size by Geographic Region (2021-2026)
4.1.1 Global Thermoplastic Automated Fiber Placement Equipment Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Thermoplastic Automated Fiber Placement Equipment Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Thermoplastic Automated Fiber Placement Equipment Market Size by Country/Region (2021-2026)
4.2.1 Global Thermoplastic Automated Fiber Placement Equipment Annual Sales by Country/Region (2021-2026)
4.2.2 Global Thermoplastic Automated Fiber Placement Equipment Annual Revenue by Country/Region (2021-2026)
4.3 Americas Thermoplastic Automated Fiber Placement Equipment Sales Growth
4.4 APAC Thermoplastic Automated Fiber Placement Equipment Sales Growth
4.5 Europe Thermoplastic Automated Fiber Placement Equipment Sales Growth

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info@marketpublishers.com

4.6 Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales Growth

5 AMERICAS

5.1 Americas Thermoplastic Automated Fiber Placement Equipment Sales by Country
5.1.1 Americas Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026)
5.1.2 Americas Thermoplastic Automated Fiber Placement Equipment Revenue by Country (2021-2026)
5.2 Americas Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026)
5.3 Americas Thermoplastic Automated Fiber Placement Equipment Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Thermoplastic Automated Fiber Placement Equipment Sales by Region
6.1.1 APAC Thermoplastic Automated Fiber Placement Equipment Sales by Region (2021-2026)
6.1.2 APAC Thermoplastic Automated Fiber Placement Equipment Revenue by Region (2021-2026)
6.2 APAC Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026)
6.3 APAC Thermoplastic Automated Fiber Placement Equipment 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

+357 96 030922
info@marketpublishers.com

7.1 Europe Thermoplastic Automated Fiber Placement Equipment by Country
7.1.1 Europe Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026)
7.1.2 Europe Thermoplastic Automated Fiber Placement Equipment Revenue by Country (2021-2026)
7.2 Europe Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026)
7.3 Europe Thermoplastic Automated Fiber Placement Equipment 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 Thermoplastic Automated Fiber Placement Equipment by Country
8.1.1 Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026)
8.1.2 Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Revenue by Country (2021-2026)
8.2 Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026)
8.3 Middle East & Africa Thermoplastic Automated Fiber Placement Equipment 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

+357 96 030922
info@marketpublishers.com

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Thermoplastic Automated Fiber Placement Equipment
10.3 Manufacturing Process Analysis of Thermoplastic Automated Fiber Placement Equipment
10.4 Industry Chain Structure of Thermoplastic Automated Fiber Placement Equipment

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Thermoplastic Automated Fiber Placement Equipment Distributors
11.3 Thermoplastic Automated Fiber Placement Equipment Customer

12 WORLD FORECAST REVIEW FOR THERMOPLASTIC AUTOMATED FIBER PLACEMENT EQUIPMENT BY GEOGRAPHIC REGION

12.1 Global Thermoplastic Automated Fiber Placement Equipment Market Size Forecast by Region
  12.1.1 Global Thermoplastic Automated Fiber Placement Equipment Forecast by Region (2027-2032)
  12.1.2 Global Thermoplastic Automated Fiber Placement Equipment 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 Thermoplastic Automated Fiber Placement Equipment Forecast by Type (2027-2032)
12.7 Global Thermoplastic Automated Fiber Placement Equipment Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Electroimpact

+357 96 030922
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13.1.1 Electroimpact Company Information
13.1.2 Electroimpact Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.1.3 Electroimpact Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Electroimpact Main Business Overview
13.1.5 Electroimpact Latest Developments
13.2 Coriolis Composites
13.2.1 Coriolis Composites Company Information
13.2.2 Coriolis Composites Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.2.3 Coriolis Composites Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Coriolis Composites Main Business Overview
13.2.5 Coriolis Composites Latest Developments
13.3 Mikrosam
13.3.1 Mikrosam Company Information
13.3.2 Mikrosam Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.3.3 Mikrosam Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Mikrosam Main Business Overview
13.3.5 Mikrosam Latest Developments
13.4 Addcomposites
13.4.1 Addcomposites Company Information
13.4.2 Addcomposites Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.4.3 Addcomposites Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Addcomposites Main Business Overview
13.4.5 Addcomposites Latest Developments
13.5 Trelleborg
13.5.1 Trelleborg Company Information
13.5.2 Trelleborg Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.5.3 Trelleborg Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Trelleborg Main Business Overview
13.5.5 Trelleborg Latest Developments

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info@marketpublishers.com

13.6 Accudyne Systems
13.6.1 Accudyne Systems Company Information
13.6.2 Accudyne Systems Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.6.3 Accudyne Systems Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Accudyne Systems Main Business Overview
13.6.5 Accudyne Systems Latest Developments
13.7 Broetje-Automation
13.7.1 Broetje-Automation Company Information
13.7.2 Broetje-Automation Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.7.3 Broetje-Automation Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Broetje-Automation Main Business Overview
13.7.5 Broetje-Automation Latest Developments
13.8 MTorres
13.8.1 MTorres Company Information
13.8.2 MTorres Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.8.3 MTorres Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 MTorres Main Business Overview
13.8.5 MTorres Latest Developments
13.9 Ingersoll Machine Tools
13.9.1 Ingersoll Machine Tools Company Information
13.9.2 Ingersoll Machine Tools Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.9.3 Ingersoll Machine Tools Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Ingersoll Machine Tools Main Business Overview
13.9.5 Ingersoll Machine Tools Latest Developments
13.10 Coexpair Dynamics
13.10.1 Coexpair Dynamics Company Information
13.10.2 Coexpair Dynamics Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.10.3 Coexpair Dynamics Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Coexpair Dynamics Main Business Overview

+357 96 030922
info@marketpublishers.com

13.10.5 Coexpair Dynamics Latest Developments
13.11 AFPT
13.11.1 AFPT Company Information
13.11.2 AFPT Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.11.3 AFPT Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 AFPT Main Business Overview
13.11.5 AFPT Latest Developments
13.12 Genertec Qiqihar No.2 Machine Tool
13.12.1 Genertec Qiqihar No.2 Machine Tool Company Information
13.12.2 Genertec Qiqihar No.2 Machine Tool Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.12.3 Genertec Qiqihar No.2 Machine Tool Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Genertec Qiqihar No.2 Machine Tool Main Business Overview
13.12.5 Genertec Qiqihar No.2 Machine Tool Latest Developments
13.13 Suzhou Layway Intelligent Manufacturing
13.13.1 Suzhou Layway Intelligent Manufacturing Company Information
13.13.2 Suzhou Layway Intelligent Manufacturing Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.13.3 Suzhou Layway Intelligent Manufacturing Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Suzhou Layway Intelligent Manufacturing Main Business Overview
13.13.5 Suzhou Layway Intelligent Manufacturing Latest Developments
13.14 ISBOT (Wuhan) Technology
13.14.1 ISBOT (Wuhan) Technology Company Information
13.14.2 ISBOT (Wuhan) Technology Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.14.3 ISBOT (Wuhan) Technology Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 ISBOT (Wuhan) Technology Main Business Overview
13.14.5 ISBOT (Wuhan) Technology Latest Developments
13.15 Hangzhou TKS Additive Technology
13.15.1 Hangzhou TKS Additive Technology Company Information
13.15.2 Hangzhou TKS Additive Technology Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.15.3 Hangzhou TKS Additive Technology Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.15.4 Hangzhou TKS Additive Technology Main Business Overview
13.15.5 Hangzhou TKS Additive Technology Latest Developments
13.16 Shanghai Electric
13.16.1 Shanghai Electric Company Information
13.16.2 Shanghai Electric Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.16.3 Shanghai Electric Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Shanghai Electric Main Business Overview
13.16.5 Shanghai Electric Latest Developments
13.17 KEDAI AVIATION (SHANGHAI) EQUIPMENT
13.17.1 KEDAI AVIATION (SHANGHAI) EQUIPMENT Company Information
13.17.2 KEDAI AVIATION (SHANGHAI) EQUIPMENT Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.17.3 KEDAI AVIATION (SHANGHAI) EQUIPMENT Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 KEDAI AVIATION (SHANGHAI) EQUIPMENT Main Business Overview
13.17.5 KEDAI AVIATION (SHANGHAI) EQUIPMENT Latest Developments
13.18 Dongjing Intelligent
13.18.1 Dongjing Intelligent Company Information
13.18.2 Dongjing Intelligent Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
13.18.3 Dongjing Intelligent Thermoplastic Automated Fiber Placement Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Dongjing Intelligent Main Business Overview
13.18.5 Dongjing Intelligent Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Thermoplastic Automated Fiber Placement Equipment Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Thermoplastic Automated Fiber Placement Equipment Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Laser Heating
Table 4. Major Players of Infrared Heating
Table 5. Major Players of Flash Lamp Heating
Table 6. Global Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026) & (Units)
Table 7. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
Table 8. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Type (2021-2026) & ($ million)
Table 9. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Type (2021-2026)
Table 10. Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of Robotic Type
Table 12. Major Players of Gantry Type
Table 13. Global Thermoplastic Automated Fiber Placement Equipment Sales by Machine Configuration (2021-2026) & (Units)
Table 14. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Machine Configuration (2021-2026)
Table 15. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Machine Configuration (2021-2026) & ($ million)
Table 16. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Machine Configuration (2021-2026)
Table 17. Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Machine Configuration (2021-2026) & (US$/Unit)
Table 18. Major Players of Single-Tow
Table 19. Major Players of Multi-Tow
Table 20. Global Thermoplastic Automated Fiber Placement Equipment Sales by Tow Configuration (2021-2026) & (Units)
Table 21. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Tow Configuration (2021-2026)

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Table 22. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Tow Configuration (2021-2026) & ($ million)
Table 23. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Tow Configuration (2021-2026)
Table 24. Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Tow Configuration (2021-2026) & (US$/Unit)
Table 25. Global Thermoplastic Automated Fiber Placement Equipment Sale by Application (2021-2026) & (Units)
Table 26. Global Thermoplastic Automated Fiber Placement Equipment Sale Market Share by Application (2021-2026)
Table 27. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Application (2021-2026) & ($ million)
Table 28. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Application (2021-2026)
Table 29. Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Application (2021-2026) & (US$/Unit)
Table 30. Global Thermoplastic Automated Fiber Placement Equipment Sales by Company (2021-2026) & (Units)
Table 31. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Company (2021-2026)
Table 32. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Company (2021-2026) & ($ millions)
Table 33. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Company (2021-2026)
Table 34. Global Thermoplastic Automated Fiber Placement Equipment Sale Price by Company (2021-2026) & (US$/Unit)
Table 35. Key Manufacturers Thermoplastic Automated Fiber Placement Equipment Producing Area Distribution and Sales Area
Table 36. Players Thermoplastic Automated Fiber Placement Equipment Products Offered
Table 37. Thermoplastic Automated Fiber Placement Equipment Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 38. New Products and Potential Entrants
Table 39. Market M&A Activity & Strategy
Table 40. Global Thermoplastic Automated Fiber Placement Equipment Sales by Geographic Region (2021-2026) & (Units)
Table 41. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share Geographic Region (2021-2026)
Table 42. Global Thermoplastic Automated Fiber Placement Equipment Revenue by

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Geographic Region (2021-2026) & ($ millions)
Table 43. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Geographic Region (2021-2026)
Table 44. Global Thermoplastic Automated Fiber Placement Equipment Sales by Country/Region (2021-2026) & (Units)
Table 45. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country/Region (2021-2026)
Table 46. Global Thermoplastic Automated Fiber Placement Equipment Revenue by Country/Region (2021-2026) & ($ millions)
Table 47. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Country/Region (2021-2026)
Table 48. Americas Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026) & (Units)
Table 49. Americas Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country (2021-2026)
Table 50. Americas Thermoplastic Automated Fiber Placement Equipment Revenue by Country (2021-2026) & ($ millions)
Table 51. Americas Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026) & (Units)
Table 52. Americas Thermoplastic Automated Fiber Placement Equipment Sales by Application (2021-2026) & (Units)
Table 53. APAC Thermoplastic Automated Fiber Placement Equipment Sales by Region (2021-2026) & (Units)
Table 54. APAC Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Region (2021-2026)
Table 55. APAC Thermoplastic Automated Fiber Placement Equipment Revenue by Region (2021-2026) & ($ millions)
Table 56. APAC Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026) & (Units)
Table 57. APAC Thermoplastic Automated Fiber Placement Equipment Sales by Application (2021-2026) & (Units)
Table 58. Europe Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026) & (Units)
Table 59. Europe Thermoplastic Automated Fiber Placement Equipment Revenue by Country (2021-2026) & ($ millions)
Table 60. Europe Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026) & (Units)
Table 61. Europe Thermoplastic Automated Fiber Placement Equipment Sales by Application (2021-2026) & (Units)

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Table 62. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales by Country (2021-2026) & (Units)
Table 63. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Country (2021-2026)
Table 64. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales by Type (2021-2026) & (Units)
Table 65. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales by Application (2021-2026) & (Units)
Table 66. Key Market Drivers & Growth Opportunities of Thermoplastic Automated Fiber Placement Equipment
Table 67. Key Market Challenges & Risks of Thermoplastic Automated Fiber Placement Equipment
Table 68. Key Industry Trends of Thermoplastic Automated Fiber Placement Equipment
Table 69. Thermoplastic Automated Fiber Placement Equipment Raw Material
Table 70. Key Suppliers of Raw Materials
Table 71. Thermoplastic Automated Fiber Placement Equipment Distributors List
Table 72. Thermoplastic Automated Fiber Placement Equipment Customer List
Table 73. Global Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Region (2027-2032) & (Units)
Table 74. Global Thermoplastic Automated Fiber Placement Equipment Revenue Forecast by Region (2027-2032) & ($ millions)
Table 75. Americas Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 76. Americas Thermoplastic Automated Fiber Placement Equipment Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. APAC Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Region (2027-2032) & (Units)
Table 78. APAC Thermoplastic Automated Fiber Placement Equipment Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Europe Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 80. Europe Thermoplastic Automated Fiber Placement Equipment Revenue Forecast by Country (2027-2032) & ($ millions)
Table 81. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 82. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Revenue Forecast by Country (2027-2032) & ($ millions)
Table 83. Global Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Type (2027-2032) & (Units)

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Table 84. Global Thermoplastic Automated Fiber Placement Equipment Revenue Forecast by Type (2027-2032) & ($ millions)
Table 85. Global Thermoplastic Automated Fiber Placement Equipment Sales Forecast by Application (2027-2032) & (Units)
Table 86. Global Thermoplastic Automated Fiber Placement Equipment Revenue Forecast by Application (2027-2032) & ($ millions)
Table 87. Electroimpact Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 88. Electroimpact Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 89. Electroimpact Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 90. Electroimpact Main Business
Table 91. Electroimpact Latest Developments
Table 92. Coriolis Composites Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 93. Coriolis Composites Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 94. Coriolis Composites Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 95. Coriolis Composites Main Business
Table 96. Coriolis Composites Latest Developments
Table 97. Mikrosam Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 98. Mikrosam Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 99. Mikrosam Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 100. Mikrosam Main Business
Table 101. Mikrosam Latest Developments
Table 102. Addcomposites Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 103. Addcomposites Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 104. Addcomposites Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 105. Addcomposites Main Business
Table 106. Addcomposites Latest Developments
Table 107. Trelleborg Basic Information, Thermoplastic Automated Fiber Placement

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Equipment Manufacturing Base, Sales Area and Its Competitors
Table 108. Trelleborg Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 109. Trelleborg Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 110. Trelleborg Main Business
Table 111. Trelleborg Latest Developments
Table 112. Accudyne Systems Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 113. Accudyne Systems Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 114. Accudyne Systems Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 115. Accudyne Systems Main Business
Table 116. Accudyne Systems Latest Developments
Table 117. Broetje-Automation Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 118. Broetje-Automation Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 119. Broetje-Automation Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 120. Broetje-Automation Main Business
Table 121. Broetje-Automation Latest Developments
Table 122. MTorres Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 123. MTorres Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 124. MTorres Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 125. MTorres Main Business
Table 126. MTorres Latest Developments
Table 127. Ingersoll Machine Tools Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 128. Ingersoll Machine Tools Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 129. Ingersoll Machine Tools Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 130. Ingersoll Machine Tools Main Business

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Table 131. Ingersoll Machine Tools Latest Developments
Table 132. Coexpair Dynamics Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 133. Coexpair Dynamics Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 134. Coexpair Dynamics Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 135. Coexpair Dynamics Main Business
Table 136. Coexpair Dynamics Latest Developments
Table 137. AFPT Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 138. AFPT Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 139. AFPT Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 140. AFPT Main Business
Table 141. AFPT Latest Developments
Table 142. Genertec Qiqihar No.2 Machine Tool Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 143. Genertec Qiqihar No.2 Machine Tool Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 144. Genertec Qiqihar No.2 Machine Tool Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 145. Genertec Qiqihar No.2 Machine Tool Main Business
Table 146. Genertec Qiqihar No.2 Machine Tool Latest Developments
Table 147. Suzhou Layway Intelligent Manufacturing Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 148. Suzhou Layway Intelligent Manufacturing Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 149. Suzhou Layway Intelligent Manufacturing Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 150. Suzhou Layway Intelligent Manufacturing Main Business
Table 151. Suzhou Layway Intelligent Manufacturing Latest Developments
Table 152. ISBOT (Wuhan) Technology Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors

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Table 153. ISBOT (Wuhan) Technology Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 154. ISBOT (Wuhan) Technology Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 155. ISBOT (Wuhan) Technology Main Business
Table 156. ISBOT (Wuhan) Technology Latest Developments
Table 157. Hangzhou TKS Additive Technology Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 158. Hangzhou TKS Additive Technology Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 159. Hangzhou TKS Additive Technology Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 160. Hangzhou TKS Additive Technology Main Business
Table 161. Hangzhou TKS Additive Technology Latest Developments
Table 162. Shanghai Electric Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 163. Shanghai Electric Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 164. Shanghai Electric Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 165. Shanghai Electric Main Business
Table 166. Shanghai Electric Latest Developments
Table 167. KEDAI AVIATION (SHANGHAI) EQUIPMENT Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 168. KEDAI AVIATION (SHANGHAI) EQUIPMENT Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications
Table 169. KEDAI AVIATION (SHANGHAI) EQUIPMENT Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 170. KEDAI AVIATION (SHANGHAI) EQUIPMENT Main Business
Table 171. KEDAI AVIATION (SHANGHAI) EQUIPMENT Latest Developments
Table 172. Dongjing Intelligent Basic Information, Thermoplastic Automated Fiber Placement Equipment Manufacturing Base, Sales Area and Its Competitors
Table 173. Dongjing Intelligent Thermoplastic Automated Fiber Placement Equipment Product Portfolios and Specifications

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Table 174. Dongjing Intelligent Thermoplastic Automated Fiber Placement Equipment Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 175. Dongjing Intelligent Main Business
Table 176. Dongjing Intelligent Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Thermoplastic Automated Fiber Placement Equipment
Figure 2. Thermoplastic Automated Fiber Placement Equipment Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Thermoplastic Automated Fiber Placement Equipment Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Thermoplastic Automated Fiber Placement Equipment Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Thermoplastic Automated Fiber Placement Equipment Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country/Region (2025)
Figure 10. Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Laser Heating
Figure 12. Product Picture of Infrared Heating
Figure 13. Product Picture of Flash Lamp Heating
Figure 14. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type in 2026
Figure 15. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of Robotic Type
Figure 17. Product Picture of Gantry Type
Figure 18. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Machine Configuration in 2026
Figure 19. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Machine Configuration (2021-2026)
Figure 20. Product Picture of Single-Tow
Figure 21. Product Picture of Multi-Tow
Figure 22. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Tow Configuration in 2026
Figure 23. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Tow Configuration (2021-2026)

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Figure 24. Thermoplastic Automated Fiber Placement Equipment Consumed in Aerospace
Figure 25. Global Thermoplastic Automated Fiber Placement Equipment Market: Aerospace (2021-2026) & (Units)
Figure 26. Thermoplastic Automated Fiber Placement Equipment Consumed in Automotive
Figure 27. Global Thermoplastic Automated Fiber Placement Equipment Market: Automotive (2021-2026) & (Units)
Figure 28. Thermoplastic Automated Fiber Placement Equipment Consumed in Rail Transit
Figure 29. Global Thermoplastic Automated Fiber Placement Equipment Market: Rail Transit (2021-2026) & (Units)
Figure 30. Thermoplastic Automated Fiber Placement Equipment Consumed in Energy
Figure 31. Global Thermoplastic Automated Fiber Placement Equipment Market: Energy (2021-2026) & (Units)
Figure 32. Thermoplastic Automated Fiber Placement Equipment Consumed in Industrial Manufacturing
Figure 33. Global Thermoplastic Automated Fiber Placement Equipment Market: Industrial Manufacturing (2021-2026) & (Units)
Figure 34. Thermoplastic Automated Fiber Placement Equipment Consumed in Other
Figure 35. Global Thermoplastic Automated Fiber Placement Equipment Market: Other (2021-2026) & (Units)
Figure 36. Global Thermoplastic Automated Fiber Placement Equipment Sale Market Share by Application (2025)
Figure 37. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Application in 2025
Figure 38. Thermoplastic Automated Fiber Placement Equipment Sales by Company in 2025 (Units)
Figure 39. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Company in 2025
Figure 40. Thermoplastic Automated Fiber Placement Equipment Revenue by Company in 2025 ($ millions)
Figure 41. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Company in 2025
Figure 42. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Geographic Region (2021-2026)
Figure 43. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Geographic Region in 2025
Figure 44. Americas Thermoplastic Automated Fiber Placement Equipment Sales

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2021-2026 (Units)
Figure 45. Americas Thermoplastic Automated Fiber Placement Equipment Revenue 2021-2026 ($ millions)
Figure 46. APAC Thermoplastic Automated Fiber Placement Equipment Sales 2021-2026 (Units)
Figure 47. APAC Thermoplastic Automated Fiber Placement Equipment Revenue 2021-2026 ($ millions)
Figure 48. Europe Thermoplastic Automated Fiber Placement Equipment Sales 2021-2026 (Units)
Figure 49. Europe Thermoplastic Automated Fiber Placement Equipment Revenue 2021-2026 ($ millions)
Figure 50. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales 2021-2026 (Units)
Figure 51. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Revenue 2021-2026 ($ millions)
Figure 52. Americas Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country in 2025
Figure 53. Americas Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Country (2021-2026)
Figure 54. Americas Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
Figure 55. Americas Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Application (2021-2026)
Figure 56. United States Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 57. Canada Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 58. Mexico Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 59. Brazil Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 60. APAC Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Region in 2025
Figure 61. APAC Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Region (2021-2026)
Figure 62. APAC Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
Figure 63. APAC Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Application (2021-2026)

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Figure 64. China Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 65. Japan Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 66. South Korea Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 67. Southeast Asia Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 68. India Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 69. Australia Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 70. China Taiwan Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 71. Europe Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country in 2025
Figure 72. Europe Thermoplastic Automated Fiber Placement Equipment Revenue Market Share by Country (2021-2026)
Figure 73. Europe Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
Figure 74. Europe Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Application (2021-2026)
Figure 75. Germany Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 76. France Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 77. UK Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 78. Italy Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 79. Russia Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 80. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Country (2021-2026)
Figure 81. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Type (2021-2026)
Figure 82. Middle East & Africa Thermoplastic Automated Fiber Placement Equipment Sales Market Share by Application (2021-2026)
Figure 83. Egypt Thermoplastic Automated Fiber Placement Equipment Revenue

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Growth 2021-2026 ($ millions)
Figure 84. South Africa Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 85. Israel Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 86. Turkey Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 87. GCC Countries Thermoplastic Automated Fiber Placement Equipment Revenue Growth 2021-2026 ($ millions)
Figure 88. Manufacturing Cost Structure Analysis of Thermoplastic Automated Fiber Placement Equipment in 2026
Figure 89. Manufacturing Process Analysis of Thermoplastic Automated Fiber Placement Equipment
Figure 90. Industry Chain Structure of Thermoplastic Automated Fiber Placement Equipment
Figure 91. Channels of Distribution
Figure 92. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Forecast by Region (2027-2032)
Figure 93. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share Forecast by Region (2027-2032)
Figure 94. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share Forecast by Type (2027-2032)
Figure 95. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share Forecast by Type (2027-2032)
Figure 96. Global Thermoplastic Automated Fiber Placement Equipment Sales Market Share Forecast by Application (2027-2032)
Figure 97. Global Thermoplastic Automated Fiber Placement Equipment Revenue Market Share Forecast by Application (2027-2032)

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