

# **Advanced Composites Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Fiber Type (S-Glass Composite, Aramid Fiber Composite, Carbon Fiber Composite, Others), By Manufacturing Process (Hand Lay Process, Injection Molding, Compression Molding, Pultrusion, Others), By End User (Transportation, Aerospace, Electricals & Electronics, Others), By Region and Competition**

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## **Abstracts**

Global Advanced Composites Market has valued at USD32.41 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.33% through 2028. Advanced Composites are materials that are composed of more than two constituent elements possessing different chemical or physical properties. The advanced composite, also known as the polymer matrix, showcases extraordinary properties, including high-strength fibers with remarkable stiffness, elasticity, temperature resistance, chemical resistance, dimensional stability, and more. These composites have a wide range of applications, particularly in replacing metal components, and are extensively utilized in the aerospace industry.

These advanced composites play a crucial role in the manufacturing of high-performance supercars and aircraft parts, such as engine nacelles, wings, elaborators, floor beams, ailerons, rudders, landing gear doors, and various other components. Their exceptional strength combined with reduced weight significantly enhances operational efficiency. By employing advanced manufacturing processes, multiple components are blended to create advanced composite materials (ACM) that possess high specific

strength and stiffness. Compared to the traditional composite materials commonly used in reinforced concrete, structures made from advanced composites are lightweight and exhibit exceptional strength.

The Advanced Composites Market is expected to experience substantial growth due to increasing demand in the automotive and aerospace industries. These industries value advanced composites for their outstanding technical properties, including high strength, stiffness, fatigue resistance, and abrasion resistance. The adoption of advanced composites is driven by the need for high-performance components in supercars and aircraft, as they provide excellent strength while reducing overall weight.

Furthermore, the rapid pace of urbanization and improved lifestyle will contribute to an increase in the number of airline passengers, accompanied by reduced airfare prices. For instance, it is projected that global air traffic will grow by over 5% by 2025. Moreover, the total number of large commercial aircraft delivered is expected to exceed 1500 units by the end of the forecast period, compared to approximately 1200 units delivered in 2013. Additionally, the automotive industry will play a significant role in the growth of the Advanced Composites Market, especially in countries like China, Japan, and the United States. Automobile manufacturers are increasingly incorporating polymer composites into their vehicles as part of their initiatives to enhance performance and efficiency.

In conclusion, the utilization of advanced composites presents a promising future in various industries, driven by their exceptional properties and the continuous efforts of manufacturers to innovate and improve their products.

## Key Market Drivers

### Growing Demand of Advanced Composites in Transportation Industry

Advanced composites, often referred to as high-performance composites, are materials that combine high-strength fibers, such as carbon or glass, with polymer resins to create a product with exceptional mechanical properties. These composites are renowned for their remarkable strength-to-weight ratio, corrosion resistance, and durability, making them ideal for a vast array of applications.

In the transportation industry, the use of advanced composites has gained significant traction as a means to address the growing demand for lighter and more fuel-efficient vehicles. By incorporating these materials into the design and manufacturing processes,

vehicle weight can be substantially reduced, resulting in improved fuel efficiency and reduced emissions.

One of the notable advantages of advanced composites over traditional materials, like steel and aluminum, is their superior durability and resistance to corrosion. Vehicles constructed with advanced composites require less maintenance and boast longer lifespans, leading to increased cost-savings over time.

The versatility of advanced composites is evident as they find applications in various components of transportation vehicles, including frames, bodies, interiors, and propulsion systems. Their popularity extends beyond the automotive industry, with aerospace, marine, and rail sectors also embracing their benefits.

The rising demand for advanced composites in the transportation industry has had a profound impact on the market. As more manufacturers recognize the advantages of these materials, the demand continues to grow, stimulating further innovation and development in the advanced composites sector.

Manufacturers are investing in extensive research and development efforts to create new, high-performance composites that meet the specific needs of the transportation industry. This commitment to innovation ensures that advanced composites will continue to evolve and cater to the ever-changing demands of the market.

Furthermore, the shift towards more sustainable and fuel-efficient transportation options provides an additional impetus for the increased demand for advanced composites. As the industry strives to meet environmental goals, these materials offer a promising solution for achieving greater sustainability.

The ongoing advancements in advanced composites exemplify their transformative potential in the transportation industry and beyond. With their exceptional properties and continuous development, these materials are poised to play a pivotal role in shaping the future of transportation.

### Growing Demand of Advanced Composites in Electronic Industry

Advanced composites are innovative materials that are created by combining high-strength fibers, such as carbon or glass, with polymer resins. This unique combination results in composites that possess exceptional mechanical properties, including a remarkable strength-to-weight ratio, remarkable corrosion resistance, and exceptional

durability. These remarkable attributes make advanced composites highly suitable for a wide range of applications across diverse industries.

In recent years, the electronics industry has increasingly recognized the immense potential of advanced composites in enhancing product performance and durability. Thanks to their lightweight nature, exceptional strength, excellent electrical insulation properties, and resistance to environmental factors, these composites have become the material of choice for numerous electronic applications.

Advanced composites find extensive use in the manufacturing of various electronic components, including circuit boards, connectors, insulators, and enclosures. They are also widely employed in the production of semiconductors, capacitors, resistors, and other electronic devices.

Moreover, with the ongoing trend towards miniaturization in electronics, there is a growing demand for materials that can withstand high temperatures, offer excellent dimensional stability, and provide effective electromagnetic shielding. Advanced composites, with their unique combination of properties, fulfill these requirements, making them an increasingly attractive choice for electronic manufacturers.

The increasing demand for advanced composites in the electronics industry has had a significant impact on the global advanced composites market. As more manufacturers in this sector recognize the numerous benefits offered by these materials, the demand for advanced composites is expected to witness further growth in the coming years.

This escalating demand is driving innovation and development within the advanced composites sector. Manufacturers are investing significantly in research and development efforts to create new, high-performance composites that can meet the specific needs and requirements of the electronics industry.

Furthermore, the continued growth of the electronics industry, fueled by ongoing technological advancements and increasing consumer demand, is projected to provide a significant boost to the advanced composites market.

In summary, advanced composites are revolutionizing the electronics industry, thanks to their exceptional mechanical properties and unique combination of attributes. The growing demand for these materials is driving innovation and development, ensuring that advanced composites remain at the forefront of the materials industry for years to come.

## Key Market Challenges

### Volatility in Price of Raw Materials

Advanced composites, also known as composite materials, are a class of high-performance materials that are created by combining strong fibers, such as carbon fibers, with polymer resins. These materials possess exceptional mechanical properties, including a high strength-to-weight ratio and resistance to corrosion. As a result, they are increasingly being utilized across a wide range of industries and applications, including aerospace, automotive, and construction.

The production process of advanced composites relies on several key raw materials, such as carbon fibers, epoxy resins, and thermoplastic polymers. These raw materials play a crucial role in determining the quality and performance of the final composite product. However, the prices of these raw materials can be subject to significant fluctuations due to various factors, including changes in supply and demand dynamics, geopolitical tensions, natural disasters, and regulatory policies.

The price volatility of these raw materials presents a significant challenge for manufacturers operating in the advanced composites market. To ensure smooth operations and maintain profitability, manufacturers often need to carefully plan their production schedules and budgets well in advance. However, sudden, and unpredictable changes in raw material prices can disrupt these plans, leading to increased production costs and reduced profit margins.

Furthermore, this inherent uncertainty regarding raw material prices can complicate the pricing strategies of manufacturers. While they strive to remain competitive in the market, they must also ensure that their products are priced adequately to cover costs and maintain profitability. Failure to strike this delicate balance can potentially impact their market share and overall competitiveness.

Given these challenges, manufacturers in the advanced composites industry must closely monitor the market dynamics, establish strong supplier relationships, and implement effective risk management strategies to mitigate the impact of price volatility. By doing so, they can navigate these complexities and maintain their position in a highly competitive market landscape.

## Key Market Trends

## Advancements in Manufacturing Technologies

As the demand for advanced composites continues to grow, there is an increasing need for efficient, scalable, and cost-effective manufacturing technologies that can meet these demands. In recent years, significant advancements have been made in this area, with the development of new techniques and processes aimed at improving the production of advanced composites.

One notable advancement in this field is the use of automated fiber placement (AFP) and automated tape laying (ATL) technologies. These cutting-edge methods allow for the precise placement of composite materials, resulting in improved product quality and reduced waste. By precisely controlling the arrangement of fibers, manufacturers can enhance the strength and durability of composite structures, making them ideal for a wide range of applications.

Another emerging trend in the advanced composites sector is additive manufacturing, commonly known as 3D printing. This innovative technology enables the creation of complex, custom-designed composite parts with minimal waste. By building up the material layer by layer, manufacturers can achieve intricate geometries and optimize the use of materials, leading to greater design flexibility and reduced production costs. This opens up new possibilities for the use of advanced composites in industries such as aerospace, automotive, and healthcare.

Moreover, advancements in curing technologies, such as out-of-autoclave (OOA) curing and microwave curing, are revolutionizing the efficiency and quality of composite production. OOA curing eliminates the need for expensive autoclave equipment, reducing manufacturing costs and increasing production capacity. Microwave curing, on the other hand, offers faster curing times and improved material properties, enhancing the overall performance of composite products.

These remarkable advancements in manufacturing technologies are not only transforming the advanced composites market but also driving innovation within the sector. As manufacturers continue to adopt and refine these technologies, we can expect to witness the emergence of new composite materials and applications. This will further expand the possibilities for utilizing advanced composites in diverse industries, unlocking new levels of performance, sustainability, and cost-effectiveness.

In summary, the continuous development and integration of advanced manufacturing

technologies are propelling the advanced composites industry to new heights. These advancements are enabling manufacturers to produce higher-quality products more efficiently and at a lower cost, democratizing the use of advanced composites across various sectors. As technology continues to evolve, we can anticipate even more groundbreaking discoveries and applications in the field of advanced composites.

## Segmental Insights

### Fiber Type Insights

Based on the category of fiber type, the carbon fiber composite segment emerged as the dominant player in the global market for Advanced Composites in 2022. One of the major driving factors for market growth in the carbon industry is the expanding scope of its application in the manufacturing of wind turbines and aerospace components. Carbon materials are anticipated to witness the fastest growth in the next eight years, primarily due to their increasing adoption in the aerospace industry. The rising demand for lightweight and fuel-efficient airplanes is expected to be the key driver for the increased usage of advanced carbon materials. This trend is driven by the industry's focus on reducing emissions and enhancing overall efficiency in the aerospace sector. As a result, the market for carbon materials is poised for significant growth, offering lucrative opportunities for players in the industry.

### End User Insights

The aerospace segment is projected to experience rapid growth during the forecast period. The aerospace industry is experiencing positive year-on-year growth, fueled by increasing investments. This growth is expected to drive the demand for composites in the industry over the projected period. Additionally, the automotive industry segment is also anticipated to witness notable growth, with a projected CAGR of 8.9%. This growth can be attributed to the rising penetration of composites in vehicles. With the automotive industry's increasing demand for durable, lightweight, and conductive raw materials, the advanced composites market is poised to thrive over the forecast period. The integration of these advanced composites will contribute to the development of innovative and high-performance vehicles, meeting the industry's evolving demands.

### Regional Insights

North America emerged as the dominant player in the Global Advanced Composites Market in 2022, holding the largest market share in terms of value. The growing

demand in the automotive and aerospace and defense industry can be attributed to several factors. In the automotive sector, North America stands out as one of the largest markets in the world, with the United States being a major producer of automobiles. This market size is driven by the significant disposable income of consumers, which allows for increased spending on vehicles. Additionally, the ability of mass production and high product variation has further fueled the growth of the automotive industry in the country. As for the aerospace and defense industry, advancements in technology and the need for innovative solutions have contributed to its expansion. The increasing complexity of aerospace systems and the growing importance of defense capabilities have created a demand for cutting-edge technologies and expertise. Together, these factors have propelled the growth of both industries, making them vital contributors to the overall economic landscape.

### Key Market Players

Toray Industries, Inc.

Koninklijke Ten Cate NV

Teijin Limited

Hexcel Corporation

SGL Carbon Corp

Cyttec Industries Inc

Owens Corning

E. I. DuPont De Nemours and Company

Huntsman Corporation

Momentive Performance Materials Inc.

### Report Scope:

In this report, the Global Advanced Composites Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Advanced Composites Market, By Fiber Type:

S-Glass Composite

Aramid Fiber Composite

Carbon Fiber Composite

Others

Advanced Composites Market, By Manufacturing Process:

Hand Lay Process

Injection Molding

Compression Molding

Pultrusion

Others

Advanced Composites Market, By End User:

Transportation

Aerospace

Electricals & Electronics

Others

Advanced Composites Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Advanced Composites Market.

### Available Customizations:

Global Advanced Composites Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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