



MEA



GLOBAL LARGE TOW CARBON FIBER MARKET

Top 10 Competitor Insights & Gap Analysis





TABLE OF CONTENTS

1	COMPETITOR BENCHMARK AND PRODUCT INSIGHT	5
1.1	TORAY INDUSTRIES (INCL. ZOLTEK)	5
1.1.1	COMPANY OVERVIEW.....	5
1.1.2	PRODUCTS / SERVICES	5
1.2	HEXCEL.....	7
1.2.1	COMPANY OVERVIEW.....	7
1.2.2	PRODUCTS / SERVICES	7
1.3	SGL CARBON	7
1.3.1	COMPANY OVERVIEW.....	7
1.3.2	PRODUCTS / SERVICES	7
1.4	ZHONGFU SHENYING CARBON FIBER	8
1.4.1	COMPANY OVERVIEW.....	8
1.4.2	PRODUCTS / SERVICES	8
1.5	WEIHAI GUANGWEI COMPOSITES	8



1.5.1	COMPANY OVERVIEW.....	8
1.5.2	PRODUCTS / SERVICES	8
1.6	TEIJIN (TENAX BRAND).....	9
1.6.1	COMPANY OVERVIEW.....	9
1.6.2	PRODUCTS / SERVICES	9
1.7	mitsubishi chemical group.....	9
1.7.1	COMPANY OVERVIEW.....	9
1.7.2	PRODUCTS / SERVICES.....	9
1.8	DOWAKSA	10
1.8.1	COMPANY OVERVIEW.....	10
1.8.2	PRODUCTS / SERVICES	10
1.9	JIANGSU HENGSHEN	10
1.9.1	COMPANY OVERVIEW.....	10
1.9.2	PRODUCTS / SERVICES	10
1.10	JILIN CARBON VALLEY GROUP	11



1.10.1	COMPANY OVERVIEW.....	11
1.10.2	PRODUCTS / SERVICES	11
2	GAP ANALYSIS	12
2.1	PRODUCT PORTFOLIO GAP ANALYSIS	12
2.2	APPLICATION FOCUS	12
2.3	REGIONAL STRENGTHS	13
2.4	INNOVATION / R&D GAP.....	14
2.5	VISUAL GAP OVERVIEW	15
2.6	KEY INSIGHTS & OPPORTUNITIES	16



1 COMPETITOR BENCHMARK AND PRODUCT INSIGHT

1.1 TORAY INDUSTRIES (INCL. ZOLTEK)

5F, Nihonbashi Mitsui Tower 2-1-1, Nihonbashi-Muromachi, Chuo-ku, Tokyo 103-8666, Japan

Contact Number: +81-3-3245-5111

Website: www.toray.com

1.1.1 COMPANY OVERVIEW

Toray Industries, founded in 1926 and headquartered in Tokyo, Japan, is a global leader in advanced materials and technologies. The company specializes in a diverse range of products, including fibers and textiles, plastics, chemicals, carbon fiber composite materials, and medical devices. Toray's acquisition of Zoltek in 2014 enhanced its capabilities in carbon fiber production, particularly for industrial applications.

1.1.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION
TORAYCA T700S (24K)	High-strength, standard-modulus carbon fiber. A never-twisted “industry standard” fiber used in filament winding, weaving and pressure vessels. Available in 6K, 12K and 24K tow sizes.
TORAYCA T800S (24K)	Cost-effective intermediate-modulus fiber with higher tensile strength than T800H. Used in primary aircraft structures and composites. Available in 12K and 24K tow sizes.

TORAYCA T1100G (24K)	Next-generation intermediate-modulus carbon fiber with excellent processability (weaving, prepreg, etc.). Used for lightweight, tensile-critical applications (e.g. aerospace pressure vessels). Available in 12K and 24K tow sizes.
TORAYCA T1100S (24K)	Next-generation intermediate-modulus fiber optimized for filament winding. Similar high performance to T1100G. Available in 12K and 24K tow sizes.
ZOLTEK PX35 (50K)	Industrial-grade carbon fiber (95% C, PAN-based) in 50K tow. Offers high strength-to-weight and cost-effective pricing. Often used as a “commercial carbon fiber standard” for large-volume applications.
ZOLTEK OX (OPAN) Continuous Tow	Oxidized polyacrylonitrile (OPAN) fiber tow (inherently flame-resistant). Provides superior fire-blocking performance (high limiting oxygen index) and thermal stability. Supplied as a 50K tow for textile processing (weaving, yarn, nonwoven) in FR textiles and insulation.
TORAYCA T700S (24K)	High-strength, standard-modulus carbon fiber. A never-twisted “industry standard” fiber used in filament winding, weaving and pressure vessels. Available in 6K, 12K and 24K tow sizes.

Source: Company Website



1.2 HEXCEL

1.2.1 COMPANY OVERVIEW

1.2.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website

1.3 SGL CARBON

1.3.1 COMPANY OVERVIEW

1.3.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website



1.4 ZHONGFU SHENYING CARBON FIBER

1.4.1 COMPANY OVERVIEW

1.4.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website

1.5 WEIHAI GUANGWEI COMPOSITES

1.5.1 COMPANY OVERVIEW

1.5.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website



1.6 TEIJIN (TENAX BRAND)

1.6.1 COMPANY OVERVIEW

1.6.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website

1.7 MITSUBISHI CHEMICAL GROUP

1.7.1 COMPANY OVERVIEW

1.7.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website



1.8 DOWAKSA

1.8.1 COMPANY OVERVIEW

1.8.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website

1.9 JIANGSU HENGSHEN

1.9.1 COMPANY OVERVIEW

1.9.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website



1.10 JILIN CARBON VALLEY GROUP

1.10.1 COMPANY OVERVIEW

1.10.2 PRODUCTS / SERVICES

PRODUCTS / SERVICES	DESCRIPTION

Source: Company Website



2 GAP ANALYSIS

2.1 PRODUCT PORTFOLIO GAP ANALYSIS

- Fiber Grade Coverage
- Standard-Modulus (~T300/T700): Xyz
- Intermediate/High-Modulus (~T800-T1100): Xyz
- Ultra-High-Modulus (>T1100 or M55/M65): Xyz
- Large-Tow Production (48K–50K): Xyz

Gap:

2.2 APPLICATION FOCUS

- Aerospace & Defense: Xyz
- Industrial / Wind Energy / Automotive: Xyz
- Hydrogen / Pressure Vessels: Xyz
- Sustainability / Eco-Fibers: Xyz

Gap:



2.3 REGIONAL STRENGTHS

-

Gap:



2.4 INNOVATION / R&D GAP

Company	Innovation Highlights	Gaps / Opportunities
Toray		
Hexcel		
SGL Carbon		
Zhongfu Shenying		
Weihai Guangwei		
Teijin		
Mitsubishi		
DowAksa		
Hengshen		
Jilin		

Source: Company Website



2.5 VISUAL GAP OVERVIEW

Fiber / Capability	Toray	Hexcel	SGL	Zhongfu	Weihai	Teijin	Mitsubishi	DowAksa	Hengshen	Jilin
Standard-Modulus	✓									
Intermediate/High										
Ultra-High-Modulus										
Large-Tow 48-50K										
Aerospace Focus										
Industrial / Wind										
Hydrogen / Pressure										
Sustainability / Low-CO ₂										⚠

Source: Company Website

- ✓ Strong presence / capability
- ⚠ Limited or emerging capability

[Table of Content](#)



2.6 KEY INSIGHTS & OPPORTUNITIES

- **Premium vs. Industrial:** Xyz
- **Sustainability:** Xyz
- **Large-Tow Fibers:** Xyz
- **Ultra-High-Modulus Expansion:** Xyz
- **Global Brand Recognition:** Xyz

DISCLAIMER

The information provided by Market Estimation Analysis (MEA) is intended solely for general reference and informational purposes. MEA specializes in competitor benchmarking and product insights and does not produce comprehensive market research reports. While we strive to ensure that the data and insights are accurate and current, MEA makes no representations or warranties, express or implied, regarding the completeness, reliability, or accuracy of the content. MEA assumes no responsibility for the content of third-party sites. Users access, use, and rely on MEA content at their own discretion and risk. MEA and its contributors shall not be held liable for any direct, indirect, incidental, or consequential damages arising from the use or misuse of the information provided.