

Glass Fiber Reinforcements - A Global Market Overview

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Report description:

Global Glass Fiber Market Trends and Outlook

Glass fiber reinforcements are high-strength materials made from fine strands of glass, widely used to enhance the mechanical properties of polymer-based composites such as fiberglass. These reinforcements are available in various types, E-glass for electrical insulation, S-glass for superior strength, C-glass for chemical resistance, and AR-glass for alkali resistance in cement applications. Glass fibers offer numerous advantages including a high strength-to-weight ratio, corrosion and chemical resistance, excellent electrical insulation, cost-effectiveness, design flexibility, thermal stability, and dimensional reliability. These properties make them ideal for a broad range of industries such as construction (wall panels, bridge decks), automotive (body panels, bumpers), aerospace (interiors, cargo liners), marine (boat hulls), electrical (cable trays), sports (helmets, skis), and renewable energy (wind turbine blades and nacelles).

The year 2023 marked an exceptionally challenging period for the global glass fiber and composites industry. Slower-than-expected demand growth across major application areas, compounded by the effects of earlier overexpansion, especially in China, caused inventory levels to spike. Smaller manufacturers, under financial strain, initiated aggressive price reductions, driving prices of standard products like direct yarn to historic lows. Although mid-year saw some recovery in demand and stabilization in inventory, overall market sentiment remained weak, and prices struggled to rebound.

Looking ahead, the global glass fiber industry is poised for a period of sustained growth, driven by megatrends such as the transition to carbon neutrality, advancements in green technologies, and increasing adoption of sustainable materials. The global demand for glass fibers is projected to reach 8.4 million metric tons by 2030, growing at a CAGR of 4.7% between 2024 and 2030. In value terms, the market is expected to reach US\$12.3 billion by 2030. Key growth drivers include wind turbine blades, electric vehicles, and commercial aircraft, all of which rely heavily on lightweight and durable composite materials.

The global glass fiber market is highly concentrated and exhibits an oligopolistic structure. The top seven manufacturers, Jushi Group Co., Ltd., Owens Corning, Taishan Fiberglass Inc. (CTGF), Chongqing Polycomp International Corporation (CPIC), Nippon Electric Glass Co., Ltd. (NEG), Shandong Fiberglass Group Co., Ltd., and Johns Manville Corporation, collectively account for approximately 77% of the world's total glass fiber production capacity. These industry leaders are well-positioned to benefit from

rising demand and are expected to further consolidate their market dominance in the coming years.

Glass Fiber Regional Market Analysis

Driven by rapid urbanization, infrastructure development, and industrial transformation in China and India, the Asia-Pacific region dominates the global glass fiber market, accounting for 47.5% of the market by value in 2024. Applications span both cyclical sectors like construction and industrial equipment and high-growth areas such as lightweight automotive, 5G, wind power, and photovoltaics-offering a mix of stability and expansion. With strong policy support for clean energy and sustainable materials, the region is projected to remain the largest and fastest-growing market, reaching US\$6.3 billion by 2030 at a CAGR of 5%.

Global Glass Fiber Market Analysis by Product Form

The global glass fiber market by product form is dominated by chopped strands, which hold a 26% volume share in 2024 and are projected to grow at a CAGR of 4.8%, surpassing 2 million metric tons by 2030. Chopped strands are favored for their versatility and cost-effectiveness, offering strength, durability, and resistance to environmental stress, making them ideal for reinforcing materials in construction, automotive, and marine applications. In contrast, woven rovings are set to record the fastest growth, with a projected CAGR of 5.9% through 2030, driven by their critical role in high-growth sectors such as wind energy-particularly in wind turbine blades-as well as pipes, tanks, and core applications in building and construction.

Global Glass Fiber Market Analysis by End-use Application

Building & Construction represents the largest end-use sector for glass fibers globally, accounting for a 22.5% volume share in 2024. With a projected CAGR of 4.5% from 2024 to 2030, glass fiber consumption in this sector is expected to reach 1.9 million metric tons by 2030. Glass fibers are valued in construction for their strength, durability, and lightweight nature, with key applications including glass fiber reinforced concrete (GFRC) for facades and decorative elements, as well as roofing shingles, membranes, wall panels, and ceiling tiles for enhanced fire resistance and structural integrity. They also reinforce plastics and composites in doors, windows, and structural profiles, and are used in concrete mixes to improve tensile strength and minimize cracking. Meanwhile, Wind Energy is poised to be the fastest-growing application, with glass fiber demand projected to grow at a robust CAGR of 8.2%, reaching nearly 1 million metric tons by 2030, driven by rising investments in renewable energy and the material's high strength-to-weight ratio essential for wind turbine blades.

Glass Fiber Market Report Scope

This global report on Glass Fiber analyzes the market based on product form and end-use application for the period 2021-2030 with projections from 2024 to 2030 in terms of volume consumption in metric tons and value market in US\$. This report also reveals historical and current glass fibers installed production capacities and future expansions by glass fiber manufacturers across the globe. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of glass fiber industry.

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Volume consumption in Metric Tons and Value market in US\$

Companies Mentioned: 70+

Global Glass Fiber Market by Geographic Region

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- North America (The United States and Canada)
- Europe (France, Germany, Italy, Spain, The United Kingdom and Rest of Europe)
- Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)
- Rest of World (Brazil, Russia, Turkey and Other ROW)

Global Glass Fiber Market by Product Form

- Single-end Rovings
- Multi-end Rovings
- Woven Rovings
- Chopped Strands
- Chopped Strand Mat (CSM)
- Continuous Filament Mat (CFM)
- Fabrics
- Others

Global Glass Fiber Market by End-use Application

- Automotive & Transportation
- Marine
- Wind Energy
- Pipe, Tank & Other Corrosion Equipment
- Building & Construction
- Electricals & Electronics
- Consumer Goods
- Aerospace & Defense
- Others

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- China Jushi Group Co., Ltd. (China)

- Chongqing Polycomp International Corporation (CPIC)

- Chongqing Sanlei Glassfiber Co., Ltd.

- Jiangsu Changhai Composite Materials Co., Ltd.

- Johns Manville Corporation

- KCC Corporation

- Nippon Electric Glass Co. Ltd (NEG)

- Owens Corning

- Shandong Fiberglass Group Co., Ltd.

- Sichuan Weibo New Material Group Co., Ltd.

- Sisecam Elyaf Sanayii A.S.

- Taishan Fiberglass Inc. (CTGF)

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