

Global Carbon Fiber Non Woven Fabric Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Fiber Non Woven Fabric market size is expected to reach \$ 1564 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Carbon Fiber Nonwoven Fabric is an engineered sheet or web material made primarily from carbon fibers that are arranged in a random, oriented or three-dimensional fiber network and consolidated without weaving or knitting. Compared with carbon fiber woven fabric or non-crimp fabric, it usually does not rely on continuous yarn interlacing, but on chopped fibers, staple fibers, recycled carbon fibers or specialty carbon fibers bonded by mechanical, chemical, thermal or carbonaceous bonding systems. Depending on density, thickness and post-treatment, it may appear as carbon fiber veil, carbon fiber tissue, carbon fiber mat, carbon fiber felt, carbon paper or carbon fiber-based gas diffusion layer substrate. Its core characteristics include low weight, electrical and thermal conductivity, corrosion resistance, dimensional stability, resin permeability, high-temperature resistance and the ability to provide surface, interlayer or functional reinforcement in composite systems.

In 2025, global sales of Carbon Fiber Nonwoven Fabric reached approximately 14 K tons, with an average global market price of around US\$ 62/kg. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 20% to 40%.

Carbon Fiber Nonwoven Fabric is a functional intermediate material within the carbon fiber value chain. Its market size is much smaller than carbon fiber tow, woven fabrics and preregs, but its unit value is generally higher than that of conventional reinforcement textiles. Demand is not driven by a single industry, but by multiple niches

including composite surface functionalization, recycled carbon fiber reuse, gas diffusion layers for fuel cells and electrolyzers, high-temperature insulation, EMI shielding and electrochemical substrates. Overall, the global market remained medium-sized, highly specialized and application-fragmented, with suppliers mainly coming from carbon materials, technical nonwovens and fuel cell material backgrounds rather than from commodity nonwoven producers.

On the demand side, lightweight composites and sustainable materials are the fundamental growth drivers. Automotive, aerospace, rail transit, sporting goods and industrial components are increasingly using recycled carbon fiber nonwoven mats and carbon veils to reduce material cost, improve drapability over complex shapes, enhance surface quality and reduce carbon fiber waste. Compared with continuous woven fabrics, carbon fiber nonwovens offer advantages in quasi-isotropic reinforcement, forming flexibility, local reinforcement and surface functional layers. However, they usually cannot replace continuous fiber reinforcements in primary load-bearing structures, so the market is better understood as a functional interlayer, surface layer and intermediate substrate market rather than a primary structural reinforcement market.

From a growth perspective, fuel cells, water electrolysis, redox flow batteries, EMI shielding and high-temperature thermal equipment are the most important incremental areas. Carbon paper, GDL substrates, carbon felts and metal-coated carbon fiber veils have higher technical barriers, longer customer qualification cycles and stronger pricing power than conventional composite mats, which raises the industry's average selling price and gross margin. The market also faces two constraints: upstream carbon fiber supply remains cyclical and overcapacity pressure can weigh on ordinary reinforcement materials, while hydrogen, electrolyzer and fuel cell deployment can be volatile, making demand for high-end electrochemical carbon fiber nonwovens non-linear. Overall, the market is expected to keep growing, but product-level differentiation will become more obvious, with premium opportunities concentrated in high-purity, high-consistency, technically certified and scalable products.

This report studies the global Carbon Fiber Non Woven Fabric production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon Fiber Non Woven Fabric and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Carbon Fiber Non Woven

Fabric that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon Fiber Non Woven Fabric total production and demand, 2021-2032, (Tons)

Global Carbon Fiber Non Woven Fabric total production value, 2021-2032, (USD Million)

Global Carbon Fiber Non Woven Fabric production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Carbon Fiber Non Woven Fabric consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Carbon Fiber Non Woven Fabric domestic production, consumption, key domestic manufacturers and share

Global Carbon Fiber Non Woven Fabric production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Carbon Fiber Non Woven Fabric production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Carbon Fiber Non Woven Fabric production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Carbon Fiber Non Woven Fabric market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Toray, SGL Carbon, TOYOBO MC, Kureha, Tenowo, Teijin, Sigmatex, James Cropper, AvCarb Material Solutions, Gen 2 Carbon, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Carbon Fiber Non Woven Fabric market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the

forecast year.

Global Carbon Fiber Non Woven Fabric Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon Fiber Non Woven Fabric Market, Segmentation by Type:

PAN-Based

Pitch-Based

Other

Global Carbon Fiber Non Woven Fabric Market, Segmentation by Areal Weight:

? 100 g/m?

? 100 g/m?

Global Carbon Fiber Non Woven Fabric Market, Segmentation by Web Formation Method:

Wet-Laid

Dry-Laid

Global Carbon Fiber Non Woven Fabric Market, Segmentation by Application:

Automotive

Aerospace and Defense

Electronics

Marine

Sports and Leisure

Other

Companies Profiled:

Toray

SGL Carbon

TOYOBO MC

Kureha

Tenowo

Teijin

Sigmatex

James Cropper

AvCarb Material Solutions

Gen 2 Carbon

Key Questions Answered:

1. How big is the global Carbon Fiber Non Woven Fabric market?
2. What is the demand of the global Carbon Fiber Non Woven Fabric market?
3. What is the year over year growth of the global Carbon Fiber Non Woven Fabric market?
4. What is the production and production value of the global Carbon Fiber Non Woven Fabric market?
5. Who are the key producers in the global Carbon Fiber Non Woven Fabric market?
6. What are the growth factors driving the market demand?

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