

Global Carbon Fiber Paper for PEMFCs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Fiber Paper for PEMFCs market size is expected to reach \$ 2533 million by 2032, rising at a market growth of 19.8% CAGR during the forecast period (2026-2032).

Carbon Fiber Paper for PEMFCs is the basic raw material used to manufacture the gas diffusion layer (GDL) of PEMFCs. It is made from high-strength carbon fibers through a papermaking process, possessing a porous and uniform fiber network that provides mechanical support and electronic pathways for the catalyst layer. The thickness, porosity, and fiber arrangement of the base paper are controllable to meet the process requirements of subsequent microporous layer (MPL) coating and hydrophobic treatment. Carbon fiber paper itself cannot be directly used in fuel cell stacks, but its performance directly affects the conductivity, gas distribution capability, water management efficiency, and power, durability, and overall performance of the final GDL (Gas Diode Layer). In 2025, global production of Carbon Fiber Paper for PEMFCs is estimated at approximately 9.68 million square meters, with a unit price of approximately US\$57.14-142.85 per square meter, an average price of approximately US\$71.42 per square meter, and a gross profit margin of approximately 9.38%-19.74%.

The global market for carbon paper for proton exchange membrane fuel cells has experienced rapid growth in recent years, primarily driven by the expanding applications of fuel cell electric vehicles (FCEVs) and stationary hydrogen energy systems. As the largest component of the GDL market, carbon paper plays a crucial role in achieving high power density, efficient water management, and long-term durability in PEMFC stacks. Currently, the market is dominated by Asia, particularly China, Japan, and South Korea, which are leading in the development of automotive PEMFCs and large-scale stationary power generation systems. With advancements in surface coating

technology, microporous layer design, and durable materials, manufacturers are able to increase unit prices, driving high value-added growth. With the rise of the green hydrogen economy in the future, the demand for carbon fiber paper for water electrolysis hydrogen production (PEM electrolyzer) will gradually increase, but fuel cells will still occupy the main market share, and this trend is expected to remain unchanged until at least 2030.

This report studies the global Carbon Fiber Paper for PEMFCs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon Fiber Paper for PEMFCs 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 Paper for PEMFCs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon Fiber Paper for PEMFCs total production and demand, 2021-2032, (K Sqm)

Global Carbon Fiber Paper for PEMFCs total production value, 2021-2032, (USD Million)

Global Carbon Fiber Paper for PEMFCs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Carbon Fiber Paper for PEMFCs consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Carbon Fiber Paper for PEMFCs domestic production, consumption, key domestic manufacturers and share

Global Carbon Fiber Paper for PEMFCs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Carbon Fiber Paper for PEMFCs production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Carbon Fiber Paper for PEMFCs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Carbon Fiber Paper for PEMFCs 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, AvCarb, Freudenberg, JNTG, Caplinq, Mitsubishi Chemical, CeTech, Shandong Renfeng

Special Materials Co., Ltd., Shanghai Legion, 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 Paper for PEMFCs market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sq m) 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 Paper for PEMFCs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon Fiber Paper for PEMFCs Market, Segmentation by Type:

Wet Process Carbon Paper

Dry Process Carbon Paper

Global Carbon Fiber Paper for PEMFCs Market, Segmentation by Thickness:

200–300 μ m

> 300 μ m

Global Carbon Fiber Paper for PEMFCs Market, Segmentation by Surface Treatment:

PTFE Hydrophobic

Non-Hydrophobic

Global Carbon Fiber Paper for PEMFCs Market, Segmentation by Product Form:

Sheets

Rolls

Global Carbon Fiber Paper for PEMFCs Market, Segmentation by Application:

Automotive Fuel Cells

Stationary Power Generation

Portable/Backup Power

Others

Companies Profiled:

Toray

SGL Carbon

AvCarb

Freudenberg

JNTG

Caplinq

Mitsubishi Chemical

CeTech

Shandong Renfeng Special Materials Co., Ltd.

Shanghai Legion

Shenzhen General Hydrogen Corp., Ltd.

Shanghai Tanji Industrial Group Co., Ltd.

Shanghai Hesun Electric Co., Ltd.

Li Neng New Energy Technology (Beijing) Co., Ltd.

Guoke Lingxian New Materials (Changzhou) Co., Ltd.

Shanghai Jiazi New Materials Technology Co., Ltd.

Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd.

Anhui Tianfu Environment Protection and Technological Material Co.Ltd

SPIC Hydrogen Energy Technology Development Co., Ltd.

Guangdong Guanhao High-Tech Co., Ltd.

KBC Corporation, Ltd.

Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd.

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Carbon Fiber Paper for PEMFCs Introduction
- 1.2 World Carbon Fiber Paper for PEMFCs Supply & Forecast
 - 1.2.1 World Carbon Fiber Paper for PEMFCs Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.2.3 World Carbon Fiber Paper for PEMFCs Pricing Trends (2021-2032)
- 1.3 World Carbon Fiber Paper for PEMFCs Production by Region (Based on Production Site)
 - 1.3.1 World Carbon Fiber Paper for PEMFCs Production Value by Region (2021-2032)
 - 1.3.2 World Carbon Fiber Paper for PEMFCs Production by Region (2021-2032)
 - 1.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Region (2021-2032)
 - 1.3.4 North America Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.3.5 Europe Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.3.6 China Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.3.7 Japan Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.3.8 India Carbon Fiber Paper for PEMFCs Production (2021-2032)
 - 1.3.9 Southeast Asia Carbon Fiber Paper for PEMFCs Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Carbon Fiber Paper for PEMFCs Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Carbon Fiber Paper for PEMFCs Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Carbon Fiber Paper for PEMFCs Demand (2021-2032)
- 2.2 World Carbon Fiber Paper for PEMFCs Consumption by Region
 - 2.2.1 World Carbon Fiber Paper for PEMFCs Consumption by Region (2021-2026)
 - 2.2.2 World Carbon Fiber Paper for PEMFCs Consumption Forecast by Region (2027-2032)
- 2.3 United States Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.4 China Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.5 Europe Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.6 Japan Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.7 South Korea Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.8 ASEAN Carbon Fiber Paper for PEMFCs Consumption (2021-2032)
- 2.9 India Carbon Fiber Paper for PEMFCs Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Carbon Fiber Paper for PEMFCs Production Value by Manufacturer (2021-2026)
- 3.2 World Carbon Fiber Paper for PEMFCs Production by Manufacturer (2021-2026)
- 3.3 World Carbon Fiber Paper for PEMFCs Average Price by Manufacturer (2021-2026)
- 3.4 Carbon Fiber Paper for PEMFCs Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Carbon Fiber Paper for PEMFCs Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Carbon Fiber Paper for PEMFCs in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Carbon Fiber Paper for PEMFCs in 2025
- 3.6 Carbon Fiber Paper for PEMFCs Market: Overall Company Footprint Analysis
 - 3.6.1 Carbon Fiber Paper for PEMFCs Market: Region Footprint
 - 3.6.2 Carbon Fiber Paper for PEMFCs Market: Company Product Type Footprint
 - 3.6.3 Carbon Fiber Paper for PEMFCs Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Carbon Fiber Paper for PEMFCs Production Value Comparison
 - 4.1.1 United States VS China: Carbon Fiber Paper for PEMFCs Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Carbon Fiber Paper for PEMFCs Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Carbon Fiber Paper for PEMFCs Production Comparison
 - 4.2.1 United States VS China: Carbon Fiber Paper for PEMFCs Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Carbon Fiber Paper for PEMFCs Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Carbon Fiber Paper for PEMFCs Consumption Comparison
 - 4.3.1 United States VS China: Carbon Fiber Paper for PEMFCs Consumption

Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Carbon Fiber Paper for PEMFCs Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Carbon Fiber Paper for PEMFCs Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value (2021-2026)

4.4.3 United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production (2021-2026)

4.5 China Based Carbon Fiber Paper for PEMFCs Manufacturers and Market Share

4.5.1 China Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value (2021-2026)

4.5.3 China Based Manufacturers Carbon Fiber Paper for PEMFCs Production (2021-2026)

4.6 Rest of World Based Carbon Fiber Paper for PEMFCs Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Carbon Fiber Paper for PEMFCs Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Wet Process Carbon Paper

5.2.2 Dry Process Carbon Paper

5.3 Market Segment by Type

5.3.1 World Carbon Fiber Paper for PEMFCs Production by Type (2021-2032)

5.3.2 World Carbon Fiber Paper for PEMFCs Production Value by Type (2021-2032)

5.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY THICKNESS

6.1 World Carbon Fiber Paper for PEMFCs Market Size Overview by Thickness: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Thickness

6.2.1 6.2.2 200–300 ?m

6.2.3 > 300 ?m

6.3 Market Segment by Thickness

6.3.1 World Carbon Fiber Paper for PEMFCs Production by Thickness (2021-2032)

6.3.2 World Carbon Fiber Paper for PEMFCs Production Value by Thickness (2021-2032)

6.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Thickness (2021-2032)

7 MARKET ANALYSIS BY SURFACE TREATMENT

7.1 World Carbon Fiber Paper for PEMFCs Market Size Overview by Surface Treatment: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Surface Treatment

7.2.1 PTFE Hydrophobic

7.2.2 Non-Hydrophobic

7.3 Market Segment by Surface Treatment

7.3.1 World Carbon Fiber Paper for PEMFCs Production by Surface Treatment (2021-2032)

7.3.2 World Carbon Fiber Paper for PEMFCs Production Value by Surface Treatment (2021-2032)

7.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Surface Treatment (2021-2032)

8 MARKET ANALYSIS BY PRODUCT FORM

8.1 World Carbon Fiber Paper for PEMFCs Market Size Overview by Product Form: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Product Form

8.2.1 Sheets

8.2.2 Rolls

8.3 Market Segment by Product Form

8.3.1 World Carbon Fiber Paper for PEMFCs Production by Product Form (2021-2032)

8.3.2 World Carbon Fiber Paper for PEMFCs Production Value by Product Form (2021-2032)

8.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Product Form (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Carbon Fiber Paper for PEMFCs Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Automotive Fuel Cells

9.2.2 Stationary Power Generation

9.2.3 Portable/Backup Power

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Carbon Fiber Paper for PEMFCs Production by Application (2021-2032)

9.3.2 World Carbon Fiber Paper for PEMFCs Production Value by Application (2021-2032)

9.3.3 World Carbon Fiber Paper for PEMFCs Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Toray

10.1.1 Toray Details

10.1.2 Toray Major Business

10.1.3 Toray Carbon Fiber Paper for PEMFCs Product and Services

10.1.4 Toray Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Toray Recent Developments/Updates

10.1.6 Toray Competitive Strengths & Weaknesses

10.2 SGL Carbon

10.2.1 SGL Carbon Details

10.2.2 SGL Carbon Major Business

10.2.3 SGL Carbon Carbon Fiber Paper for PEMFCs Product and Services

10.2.4 SGL Carbon Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 SGL Carbon Recent Developments/Updates

10.2.6 SGL Carbon Competitive Strengths & Weaknesses

10.3 AvCarb

10.3.1 AvCarb Details

- 10.3.2 AvCarb Major Business
- 10.3.3 AvCarb Carbon Fiber Paper for PEMFCs Product and Services
- 10.3.4 AvCarb Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.3.5 AvCarb Recent Developments/Updates
- 10.3.6 AvCarb Competitive Strengths & Weaknesses
- 10.4 Freudenberg
 - 10.4.1 Freudenberg Details
 - 10.4.2 Freudenberg Major Business
 - 10.4.3 Freudenberg Carbon Fiber Paper for PEMFCs Product and Services
 - 10.4.4 Freudenberg Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.4.5 Freudenberg Recent Developments/Updates
 - 10.4.6 Freudenberg Competitive Strengths & Weaknesses
- 10.5 JNTG
 - 10.5.1 JNTG Details
 - 10.5.2 JNTG Major Business
 - 10.5.3 JNTG Carbon Fiber Paper for PEMFCs Product and Services
 - 10.5.4 JNTG Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.5.5 JNTG Recent Developments/Updates
 - 10.5.6 JNTG Competitive Strengths & Weaknesses
- 10.6 Caplinq
 - 10.6.1 Caplinq Details
 - 10.6.2 Caplinq Major Business
 - 10.6.3 Caplinq Carbon Fiber Paper for PEMFCs Product and Services
 - 10.6.4 Caplinq Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.6.5 Caplinq Recent Developments/Updates
 - 10.6.6 Caplinq Competitive Strengths & Weaknesses
- 10.7 Mitsubishi Chemical
 - 10.7.1 Mitsubishi Chemical Details
 - 10.7.2 Mitsubishi Chemical Major Business
 - 10.7.3 Mitsubishi Chemical Carbon Fiber Paper for PEMFCs Product and Services
 - 10.7.4 Mitsubishi Chemical Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.7.5 Mitsubishi Chemical Recent Developments/Updates
 - 10.7.6 Mitsubishi Chemical Competitive Strengths & Weaknesses
- 10.8 CeTech

- 10.8.1 CeTech Details
- 10.8.2 CeTech Major Business
- 10.8.3 CeTech Carbon Fiber Paper for PEMFCs Product and Services
- 10.8.4 CeTech Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.8.5 CeTech Recent Developments/Updates
- 10.8.6 CeTech Competitive Strengths & Weaknesses
- 10.9 Shandong Renfeng Special Materials Co., Ltd.
 - 10.9.1 Shandong Renfeng Special Materials Co., Ltd. Details
 - 10.9.2 Shandong Renfeng Special Materials Co., Ltd. Major Business
 - 10.9.3 Shandong Renfeng Special Materials Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services
 - 10.9.4 Shandong Renfeng Special Materials Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 Shandong Renfeng Special Materials Co., Ltd. Recent Developments/Updates
 - 10.9.6 Shandong Renfeng Special Materials Co., Ltd. Competitive Strengths & Weaknesses
- 10.10 Shanghai Legion
 - 10.10.1 Shanghai Legion Details
 - 10.10.2 Shanghai Legion Major Business
 - 10.10.3 Shanghai Legion Carbon Fiber Paper for PEMFCs Product and Services
 - 10.10.4 Shanghai Legion Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.10.5 Shanghai Legion Recent Developments/Updates
 - 10.10.6 Shanghai Legion Competitive Strengths & Weaknesses
- 10.11 Shenzhen General Hydrogen Corp., Ltd.
 - 10.11.1 Shenzhen General Hydrogen Corp., Ltd. Details
 - 10.11.2 Shenzhen General Hydrogen Corp., Ltd. Major Business
 - 10.11.3 Shenzhen General Hydrogen Corp., Ltd. Carbon Fiber Paper for PEMFCs Product and Services
 - 10.11.4 Shenzhen General Hydrogen Corp., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.11.5 Shenzhen General Hydrogen Corp., Ltd. Recent Developments/Updates
 - 10.11.6 Shenzhen General Hydrogen Corp., Ltd. Competitive Strengths & Weaknesses
- 10.12 Shanghai Tanji Industrial Group Co., Ltd.
 - 10.12.1 Shanghai Tanji Industrial Group Co., Ltd. Details
 - 10.12.2 Shanghai Tanji Industrial Group Co., Ltd. Major Business
 - 10.12.3 Shanghai Tanji Industrial Group Co., Ltd. Carbon Fiber Paper for PEMFCs

Product and Services

10.12.4 Shanghai Tanji Industrial Group Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 Shanghai Tanji Industrial Group Co., Ltd. Recent Developments/Updates

10.12.6 Shanghai Tanji Industrial Group Co., Ltd. Competitive Strengths & Weaknesses

10.13 Shanghai Hesens Electric Co., Ltd.

10.13.1 Shanghai Hesens Electric Co., Ltd. Details

10.13.2 Shanghai Hesens Electric Co., Ltd. Major Business

10.13.3 Shanghai Hesens Electric Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.13.4 Shanghai Hesens Electric Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 Shanghai Hesens Electric Co., Ltd. Recent Developments/Updates

10.13.6 Shanghai Hesens Electric Co., Ltd. Competitive Strengths & Weaknesses

10.14 Li Neng New Energy Technology (Beijing) Co., Ltd.

10.14.1 Li Neng New Energy Technology (Beijing) Co., Ltd. Details

10.14.2 Li Neng New Energy Technology (Beijing) Co., Ltd. Major Business

10.14.3 Li Neng New Energy Technology (Beijing) Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.14.4 Li Neng New Energy Technology (Beijing) Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.14.5 Li Neng New Energy Technology (Beijing) Co., Ltd. Recent Developments/Updates

10.14.6 Li Neng New Energy Technology (Beijing) Co., Ltd. Competitive Strengths & Weaknesses

10.15 Guoke Lingxian New Materials (Changzhou) Co., Ltd.

10.15.1 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Details

10.15.2 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Major Business

10.15.3 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.15.4 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.15.5 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Recent Developments/Updates

10.15.6 Guoke Lingxian New Materials (Changzhou) Co., Ltd. Competitive Strengths & Weaknesses

10.16 Shanghai Jiazi New Materials Technology Co., Ltd.

10.16.1 Shanghai Jiazi New Materials Technology Co., Ltd. Details

- 10.16.2 Shanghai Jiazi New Materials Technology Co., Ltd. Major Business
- 10.16.3 Shanghai Jiazi New Materials Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services
- 10.16.4 Shanghai Jiazi New Materials Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.16.5 Shanghai Jiazi New Materials Technology Co., Ltd. Recent Developments/Updates
- 10.16.6 Shanghai Jiazi New Materials Technology Co., Ltd. Competitive Strengths & Weaknesses
- 10.17 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd.
 - 10.17.1 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Details
 - 10.17.2 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Major Business
 - 10.17.3 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services
 - 10.17.4 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Recent Developments/Updates
 - 10.17.6 Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Competitive Strengths & Weaknesses
- 10.18 Anhui Tianfu Environment Protection and Technological Material Co.Ltd
 - 10.18.1 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Details
 - 10.18.2 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Major Business
 - 10.18.3 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Carbon Fiber Paper for PEMFCs Product and Services
 - 10.18.4 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.18.5 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Recent Developments/Updates
 - 10.18.6 Anhui Tianfu Environment Protection and Technological Material Co.Ltd Competitive Strengths & Weaknesses
- 10.19 SPIC Hydrogen Energy Technology Development Co., Ltd.
 - 10.19.1 SPIC Hydrogen Energy Technology Development Co., Ltd. Details
 - 10.19.2 SPIC Hydrogen Energy Technology Development Co., Ltd. Major Business

10.19.3 SPIC Hydrogen Energy Technology Development Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.19.4 SPIC Hydrogen Energy Technology Development Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.19.5 SPIC Hydrogen Energy Technology Development Co., Ltd. Recent Developments/Updates

10.19.6 SPIC Hydrogen Energy Technology Development Co., Ltd. Competitive Strengths & Weaknesses

10.20 Guangdong Guanhao High-Tech Co., Ltd.

10.20.1 Guangdong Guanhao High-Tech Co., Ltd. Details

10.20.2 Guangdong Guanhao High-Tech Co., Ltd. Major Business

10.20.3 Guangdong Guanhao High-Tech Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.20.4 Guangdong Guanhao High-Tech Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 Guangdong Guanhao High-Tech Co., Ltd. Recent Developments/Updates

10.20.6 Guangdong Guanhao High-Tech Co., Ltd. Competitive Strengths & Weaknesses

10.21 KBC Corporation, Ltd.

10.21.1 KBC Corporation, Ltd. Details

10.21.2 KBC Corporation, Ltd. Major Business

10.21.3 KBC Corporation, Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.21.4 KBC Corporation, Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.21.5 KBC Corporation, Ltd. Recent Developments/Updates

10.21.6 KBC Corporation, Ltd. Competitive Strengths & Weaknesses

10.22 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd.

10.22.1 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Details

10.22.2 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Major Business

10.22.3 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

10.22.4 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Recent Developments/Updates

10.22.6 Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 Carbon Fiber Paper for PEMFCs Industry Chain
- 11.2 Carbon Fiber Paper for PEMFCs Upstream Analysis
 - 11.2.1 Carbon Fiber Paper for PEMFCs Core Raw Materials
 - 11.2.2 Main Manufacturers of Carbon Fiber Paper for PEMFCs Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Carbon Fiber Paper for PEMFCs Production Mode
- 11.6 Carbon Fiber Paper for PEMFCs Procurement Model
- 11.7 Carbon Fiber Paper for PEMFCs Industry Sales Model and Sales Channels
 - 11.7.1 Carbon Fiber Paper for PEMFCs Sales Model
 - 11.7.2 Carbon Fiber Paper for PEMFCs Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Carbon Fiber Paper for PEMFCs Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Carbon Fiber Paper for PEMFCs Production Value by Region (2021-2026) & (USD Million)

Table 3. World Carbon Fiber Paper for PEMFCs Production Value by Region (2027-2032) & (USD Million)

Table 4. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Region (2021-2026)

Table 5. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Region (2027-2032)

Table 6. World Carbon Fiber Paper for PEMFCs Production by Region (2021-2026) & (K Sqm)

Table 7. World Carbon Fiber Paper for PEMFCs Production by Region (2027-2032) & (K Sqm)

Table 8. World Carbon Fiber Paper for PEMFCs Production Market Share by Region (2021-2026)

Table 9. World Carbon Fiber Paper for PEMFCs Production Market Share by Region (2027-2032)

Table 10. World Carbon Fiber Paper for PEMFCs Average Price by Region (2021-2026) & (US\$/Sq m)

Table 11. World Carbon Fiber Paper for PEMFCs Average Price by Region (2027-2032) & (US\$/Sq m)

Table 12. Carbon Fiber Paper for PEMFCs Major Market Trends

Table 13. World Carbon Fiber Paper for PEMFCs Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Sqm)

Table 14. World Carbon Fiber Paper for PEMFCs Consumption by Region (2021-2026) & (K Sqm)

Table 15. World Carbon Fiber Paper for PEMFCs Consumption Forecast by Region (2027-2032) & (K Sqm)

Table 16. World Carbon Fiber Paper for PEMFCs Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Carbon Fiber Paper for PEMFCs Producers in 2025

Table 18. World Carbon Fiber Paper for PEMFCs Production by Manufacturer (2021-2026) & (K Sqm)

Table 19. Production Market Share of Key Carbon Fiber Paper for PEMFCs Producers in 2025

Table 20. World Carbon Fiber Paper for PEMFCs Average Price by Manufacturer (2021-2026) & (US\$/Sq m)

Table 21. Global Carbon Fiber Paper for PEMFCs Company Evaluation Quadrant

Table 22. World Carbon Fiber Paper for PEMFCs Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Carbon Fiber Paper for PEMFCs Production Site of Key Manufacturer

Table 24. Carbon Fiber Paper for PEMFCs Market: Company Product Type Footprint

Table 25. Carbon Fiber Paper for PEMFCs Market: Company Product Application Footprint

Table 26. Carbon Fiber Paper for PEMFCs Competitive Factors

Table 27. Carbon Fiber Paper for PEMFCs New Entrant and Capacity Expansion Plans

Table 28. Carbon Fiber Paper for PEMFCs Mergers & Acquisitions Activity

Table 29. United States VS China Carbon Fiber Paper for PEMFCs Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Carbon Fiber Paper for PEMFCs Production Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 31. United States VS China Carbon Fiber Paper for PEMFCs Consumption Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 32. United States Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production (2021-2026) & (K Sqm)

Table 36. United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share (2021-2026)

Table 37. China Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Carbon Fiber Paper for PEMFCs Production, (2021-2026) & (K Sqm)

Table 41. China Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share (2021-2026)

Table 42. Rest of World Based Carbon Fiber Paper for PEMFCs Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production, (2021-2026) & (K Sqm)

Table 46. Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share (2021-2026)

Table 47. World Carbon Fiber Paper for PEMFCs Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Carbon Fiber Paper for PEMFCs Production by Type (2021-2026) & (K Sqm)

Table 49. World Carbon Fiber Paper for PEMFCs Production by Type (2027-2032) & (K Sqm)

Table 50. World Carbon Fiber Paper for PEMFCs Production Value by Type (2021-2026) & (USD Million)

Table 51. World Carbon Fiber Paper for PEMFCs Production Value by Type (2027-2032) & (USD Million)

Table 52. World Carbon Fiber Paper for PEMFCs Average Price by Type (2021-2026) & (US\$/Sq m)

Table 53. World Carbon Fiber Paper for PEMFCs Average Price by Type (2027-2032) & (US\$/Sq m)

Table 54. World Carbon Fiber Paper for PEMFCs Production Value by Thickness, (USD Million), 2021 & 2025 & 2032

Table 55. World Carbon Fiber Paper for PEMFCs Production by Thickness (2021-2026) & (K Sqm)

Table 56. World Carbon Fiber Paper for PEMFCs Production by Thickness (2027-2032) & (K Sqm)

Table 57. World Carbon Fiber Paper for PEMFCs Production Value by Thickness (2021-2026) & (USD Million)

Table 58. World Carbon Fiber Paper for PEMFCs Production Value by Thickness (2027-2032) & (USD Million)

Table 59. World Carbon Fiber Paper for PEMFCs Average Price by Thickness (2021-2026) & (US\$/Sq m)

Table 60. World Carbon Fiber Paper for PEMFCs Average Price by Thickness

(2027-2032) & (US\$/Sq m)

Table 61. World Carbon Fiber Paper for PEMFCs Production Value by Surface Treatment, (USD Million), 2021 & 2025 & 2032

Table 62. World Carbon Fiber Paper for PEMFCs Production by Surface Treatment (2021-2026) & (K Sqm)

Table 63. World Carbon Fiber Paper for PEMFCs Production by Surface Treatment (2027-2032) & (K Sqm)

Table 64. World Carbon Fiber Paper for PEMFCs Production Value by Surface Treatment (2021-2026) & (USD Million)

Table 65. World Carbon Fiber Paper for PEMFCs Production Value by Surface Treatment (2027-2032) & (USD Million)

Table 66. World Carbon Fiber Paper for PEMFCs Average Price by Surface Treatment (2021-2026) & (US\$/Sq m)

Table 67. World Carbon Fiber Paper for PEMFCs Average Price by Surface Treatment (2027-2032) & (US\$/Sq m)

Table 68. World Carbon Fiber Paper for PEMFCs Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Table 69. World Carbon Fiber Paper for PEMFCs Production by Product Form (2021-2026) & (K Sqm)

Table 70. World Carbon Fiber Paper for PEMFCs Production by Product Form (2027-2032) & (K Sqm)

Table 71. World Carbon Fiber Paper for PEMFCs Production Value by Product Form (2021-2026) & (USD Million)

Table 72. World Carbon Fiber Paper for PEMFCs Production Value by Product Form (2027-2032) & (USD Million)

Table 73. World Carbon Fiber Paper for PEMFCs Average Price by Product Form (2021-2026) & (US\$/Sq m)

Table 74. World Carbon Fiber Paper for PEMFCs Average Price by Product Form (2027-2032) & (US\$/Sq m)

Table 75. World Carbon Fiber Paper for PEMFCs Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Carbon Fiber Paper for PEMFCs Production by Application (2021-2026) & (K Sqm)

Table 77. World Carbon Fiber Paper for PEMFCs Production by Application (2027-2032) & (K Sqm)

Table 78. World Carbon Fiber Paper for PEMFCs Production Value by Application (2021-2026) & (USD Million)

Table 79. World Carbon Fiber Paper for PEMFCs Production Value by Application (2027-2032) & (USD Million)

Table 80. World Carbon Fiber Paper for PEMFCs Average Price by Application (2021-2026) & (US\$/Sq m)

Table 81. World Carbon Fiber Paper for PEMFCs Average Price by Application (2027-2032) & (US\$/Sq m)

Table 82. Toray Basic Information, Manufacturing Base and Competitors

Table 83. Toray Major Business

Table 84. Toray Carbon Fiber Paper for PEMFCs Product and Services

Table 85. Toray Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Toray Recent Developments/Updates

Table 87. Toray Competitive Strengths & Weaknesses

Table 88. SGL Carbon Basic Information, Manufacturing Base and Competitors

Table 89. SGL Carbon Major Business

Table 90. SGL Carbon Carbon Fiber Paper for PEMFCs Product and Services

Table 91. SGL Carbon Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. SGL Carbon Recent Developments/Updates

Table 93. SGL Carbon Competitive Strengths & Weaknesses

Table 94. AvCarb Basic Information, Manufacturing Base and Competitors

Table 95. AvCarb Major Business

Table 96. AvCarb Carbon Fiber Paper for PEMFCs Product and Services

Table 97. AvCarb Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. AvCarb Recent Developments/Updates

Table 99. AvCarb Competitive Strengths & Weaknesses

Table 100. Freudenberg Basic Information, Manufacturing Base and Competitors

Table 101. Freudenberg Major Business

Table 102. Freudenberg Carbon Fiber Paper for PEMFCs Product and Services

Table 103. Freudenberg Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Freudenberg Recent Developments/Updates

Table 105. Freudenberg Competitive Strengths & Weaknesses

Table 106. JNTG Basic Information, Manufacturing Base and Competitors

Table 107. JNTG Major Business

Table 108. JNTG Carbon Fiber Paper for PEMFCs Product and Services

Table 109. JNTG Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 110. JNTG Recent Developments/Updates
- Table 111. JNTG Competitive Strengths & Weaknesses
- Table 112. Caplinq Basic Information, Manufacturing Base and Competitors
- Table 113. Caplinq Major Business
- Table 114. Caplinq Carbon Fiber Paper for PEMFCs Product and Services
- Table 115. Caplinq Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 116. Caplinq Recent Developments/Updates
- Table 117. Caplinq Competitive Strengths & Weaknesses
- Table 118. Mitsubishi Chemical Basic Information, Manufacturing Base and Competitors
- Table 119. Mitsubishi Chemical Major Business
- Table 120. Mitsubishi Chemical Carbon Fiber Paper for PEMFCs Product and Services
- Table 121. Mitsubishi Chemical Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 122. Mitsubishi Chemical Recent Developments/Updates
- Table 123. Mitsubishi Chemical Competitive Strengths & Weaknesses
- Table 124. CeTech Basic Information, Manufacturing Base and Competitors
- Table 125. CeTech Major Business
- Table 126. CeTech Carbon Fiber Paper for PEMFCs Product and Services
- Table 127. CeTech Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 128. CeTech Recent Developments/Updates
- Table 129. CeTech Competitive Strengths & Weaknesses
- Table 130. Shandong Renfeng Special Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 131. Shandong Renfeng Special Materials Co., Ltd. Major Business
- Table 132. Shandong Renfeng Special Materials Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services
- Table 133. Shandong Renfeng Special Materials Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 134. Shandong Renfeng Special Materials Co., Ltd. Recent Developments/Updates
- Table 135. Shandong Renfeng Special Materials Co., Ltd. Competitive Strengths & Weaknesses
- Table 136. Shanghai Legion Basic Information, Manufacturing Base and Competitors

Table 137. Shanghai Legion Major Business

Table 138. Shanghai Legion Carbon Fiber Paper for PEMFCs Product and Services

Table 139. Shanghai Legion Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Shanghai Legion Recent Developments/Updates

Table 141. Shanghai Legion Competitive Strengths & Weaknesses

Table 142. Shenzhen General Hydrogen Corp., Ltd. Basic Information, Manufacturing Base and Competitors

Table 143. Shenzhen General Hydrogen Corp., Ltd. Major Business

Table 144. Shenzhen General Hydrogen Corp., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 145. Shenzhen General Hydrogen Corp., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Shenzhen General Hydrogen Corp., Ltd. Recent Developments/Updates

Table 147. Shenzhen General Hydrogen Corp., Ltd. Competitive Strengths & Weaknesses

Table 148. Shanghai Tanji Industrial Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 149. Shanghai Tanji Industrial Group Co., Ltd. Major Business

Table 150. Shanghai Tanji Industrial Group Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 151. Shanghai Tanji Industrial Group Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Shanghai Tanji Industrial Group Co., Ltd. Recent Developments/Updates

Table 153. Shanghai Tanji Industrial Group Co., Ltd. Competitive Strengths & Weaknesses

Table 154. Shanghai Hesens Electric Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 155. Shanghai Hesens Electric Co., Ltd. Major Business

Table 156. Shanghai Hesens Electric Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 157. Shanghai Hesens Electric Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Shanghai Hesens Electric Co., Ltd. Recent Developments/Updates

Table 159. Shanghai Hesens Electric Co., Ltd. Competitive Strengths & Weaknesses

Table 160. Li Neng New Energy Technology (Beijing) Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 161. Li Neng New Energy Technology (Beijing) Co., Ltd. Major Business

Table 162. Li Neng New Energy Technology (Beijing) Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 163. Li Neng New Energy Technology (Beijing) Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Li Neng New Energy Technology (Beijing) Co., Ltd. Recent Developments/Updates

Table 165. Li Neng New Energy Technology (Beijing) Co., Ltd. Competitive Strengths & Weaknesses

Table 166. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 167. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Major Business

Table 168. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 169. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Recent Developments/Updates

Table 171. Guoke Lingxian New Materials (Changzhou) Co., Ltd. Competitive Strengths & Weaknesses

Table 172. Shanghai Jiazi New Materials Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 173. Shanghai Jiazi New Materials Technology Co., Ltd. Major Business

Table 174. Shanghai Jiazi New Materials Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 175. Shanghai Jiazi New Materials Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Shanghai Jiazi New Materials Technology Co., Ltd. Recent Developments/Updates

Table 177. Shanghai Jiazi New Materials Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 178. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 179. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Major

Business

Table 180. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 181. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Recent Developments/Updates

Table 183. Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 184. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Basic Information, Manufacturing Base and Competitors

Table 185. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Major Business

Table 186. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Carbon Fiber Paper for PEMFCs Product and Services

Table 187. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Recent Developments/Updates

Table 189. Anhui Tianfu Environment Protection and Technological Material Co.Ltd Competitive Strengths & Weaknesses

Table 190. SPIC Hydrogen Energy Technology Development Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 191. SPIC Hydrogen Energy Technology Development Co., Ltd. Major Business

Table 192. SPIC Hydrogen Energy Technology Development Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 193. SPIC Hydrogen Energy Technology Development Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. SPIC Hydrogen Energy Technology Development Co., Ltd. Recent Developments/Updates

Table 195. SPIC Hydrogen Energy Technology Development Co., Ltd. Competitive Strengths & Weaknesses

Table 196. Guangdong Guanhao High-Tech Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 197. Guangdong Guanhao High-Tech Co., Ltd. Major Business

Table 198. Guangdong Guanhao High-Tech Co., Ltd. Carbon Fiber Paper for PEMFCs

Product and Services

Table 199. Guangdong Guanhao High-Tech Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. Guangdong Guanhao High-Tech Co., Ltd. Recent Developments/Updates

Table 201. Guangdong Guanhao High-Tech Co., Ltd. Competitive Strengths & Weaknesses

Table 202. KBC Corporation, Ltd. Basic Information, Manufacturing Base and Competitors

Table 203. KBC Corporation, Ltd. Major Business

Table 204. KBC Corporation, Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 205. KBC Corporation, Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 206. KBC Corporation, Ltd. Recent Developments/Updates

Table 207. KBC Corporation, Ltd. Competitive Strengths & Weaknesses

Table 208. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 209. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Major Business

Table 210. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Product and Services

Table 211. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Carbon Fiber Paper for PEMFCs Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Recent Developments/Updates

Table 213. Jiangsu Tanfeng Hydrogen Energy Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 214. Global Key Players of Carbon Fiber Paper for PEMFCs Upstream (Raw Materials)

Table 215. Global Carbon Fiber Paper for PEMFCs Typical Customers

Table 216. Carbon Fiber Paper for PEMFCs Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Carbon Fiber Paper for PEMFCs Picture

Figure 2. World Carbon Fiber Paper for PEMFCs Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Carbon Fiber Paper for PEMFCs Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 5. World Carbon Fiber Paper for PEMFCs Average Price (2021-2032) & (US\$/Sq m)

Figure 6. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Region (2021-2032)

Figure 7. World Carbon Fiber Paper for PEMFCs Production Market Share by Region (2021-2032)

Figure 8. North America Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 9. Europe Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 10. China Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 11. Japan Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 12. India Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 13. Southeast Asia Carbon Fiber Paper for PEMFCs Production (2021-2032) & (K Sqm)

Figure 14. Carbon Fiber Paper for PEMFCs Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 17. World Carbon Fiber Paper for PEMFCs Consumption Market Share by Region (2021-2032)

Figure 18. United States Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 19. China Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 20. Europe Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 21. Japan Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 22. South Korea Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 23. ASEAN Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K

Sqm)

Figure 24. India Carbon Fiber Paper for PEMFCs Consumption (2021-2032) & (K Sqm)

Figure 25. Producer Shipments of Carbon Fiber Paper for PEMFCs by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Carbon Fiber Paper for PEMFCs Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Carbon Fiber Paper for PEMFCs Markets in 2025

Figure 28. United States VS China: Carbon Fiber Paper for PEMFCs Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Carbon Fiber Paper for PEMFCs Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Carbon Fiber Paper for PEMFCs Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share 2025

Figure 32. China Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Carbon Fiber Paper for PEMFCs Production Market Share 2025

Figure 34. World Carbon Fiber Paper for PEMFCs Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Type in 2025

Figure 36. Wet Process Carbon Paper

Figure 37. Dry Process Carbon Paper

Figure 38. World Carbon Fiber Paper for PEMFCs Production Market Share by Type (2021-2032)

Figure 39. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Type (2021-2032)

Figure 40. World Carbon Fiber Paper for PEMFCs Average Price by Type (2021-2032) & (US\$/Sq m)

Figure 41. World Carbon Fiber Paper for PEMFCs Production Value by Thickness, (USD Million), 2021 & 2025 & 2032

Figure 42. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Thickness in 2025

Figure 43. Figure 44. 200–300 ?m

Figure 45. > 300 ?m

Figure 46. World Carbon Fiber Paper for PEMFCs Production Market Share by

Thickness (2021-2032)

Figure 47. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Thickness (2021-2032)

Figure 48. World Carbon Fiber Paper for PEMFCs Average Price by Thickness (2021-2032) & (US\$/Sq m)

Figure 49. World Carbon Fiber Paper for PEMFCs Production Value by Surface Treatment, (USD Million), 2021 & 2025 & 2032

Figure 50. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Surface Treatment in 2025

Figure 51. PTFE Hydrophobic

Figure 52. Non-Hydrophobic

Figure 53. World Carbon Fiber Paper for PEMFCs Production Market Share by Surface Treatment (2021-2032)

Figure 54. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Surface Treatment (2021-2032)

Figure 55. World Carbon Fiber Paper for PEMFCs Average Price by Surface Treatment (2021-2032) & (US\$/Sq m)

Figure 56. World Carbon Fiber Paper for PEMFCs Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 57. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Product Form in 2025

Figure 58. Sheets

Figure 59. Rolls

Figure 60. World Carbon Fiber Paper for PEMFCs Production Market Share by Product Form (2021-2032)

Figure 61. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Product Form (2021-2032)

Figure 62. World Carbon Fiber Paper for PEMFCs Average Price by Product Form (2021-2032) & (US\$/Sq m)

Figure 63. World Carbon Fiber Paper for PEMFCs Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 64. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Application in 2025

Figure 65. Automotive Fuel Cells

Figure 66. Stationary Power Generation

Figure 67. Portable/Backup Power

Figure 68. Others

Figure 69. World Carbon Fiber Paper for PEMFCs Production Market Share by Application (2021-2032)

Figure 70. World Carbon Fiber Paper for PEMFCs Production Value Market Share by Application (2021-2032)

Figure 71. World Carbon Fiber Paper for PEMFCs Average Price by Application (2021-2032) & (US\$/Sq m)

Figure 72. Carbon Fiber Paper for PEMFCs Industry Chain

Figure 73. Carbon Fiber Paper for PEMFCs Procurement Model

Figure 74. Carbon Fiber Paper for PEMFCs Sales Model

Figure 75. Carbon Fiber Paper for PEMFCs Sales Channels, Direct Sales, and Distribution

Figure 76. Methodology

Figure 77. Research Process and Data Source

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