

Global Carbon Fiber Raw Paper Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Carbon Fiber Raw Paper market size was valued at US\$ 323 million in 2025 and is forecast to a readjusted size of US\$ 605 million by 2032 with a CAGR of 9.2% during review period.

Carbon fiber raw paper is a porous conductive paper-based substrate mainly produced from chopped polyacrylonitrile-based carbon fibers, primarily through wet-laid processing and, to a lesser extent, through dry-laid forming routes. It is an important precursor for carbon paper, gas diffusion layers, and related conductive paper-based materials used in fuel cells and selected electrolyzer applications. The mainstream industrial route is still based on wet-laid processing, with the material first formed into a base paper layer and then further processed through impregnation, carbonization, graphitization, and surface treatment before entering downstream carbon paper or gas diffusion layer applications. Upstream raw materials mainly include PAN-based chopped carbon fibers, phenolic or other impregnation resins, dispersants, binders, and related auxiliaries. Downstream customers mainly include gas diffusion layer manufacturers, membrane electrode assembly producers, fuel cell stack companies, electrolyzer material suppliers, and research and pilot-scale users. The global production capacity of carbon fiber raw paper in 2025 is estimated at about 23.0 million square meters, with sales of about 15.864 million square meters, an average global price of about USD 19.80 per square meter, and gross margins of about 24%?36%. Overall, the market remains dominated by a limited number of manufacturers that control wet-laid paper formation and the downstream integration of carbonization and graphitization. Customer qualification cycles are relatively long, and demand is mainly concentrated in hydrogen fuel cells, PEM water electrolysis, and selected high-end electrochemical applications such as redox flow batteries.

This report is a detailed and comprehensive analysis for global Carbon Fiber Raw Paper market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Carbon Fiber Raw Paper market size and forecasts, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Carbon Fiber Raw Paper market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Carbon Fiber Raw Paper market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Carbon Fiber Raw Paper market shares of main players, shipments in revenue (\$ Million), sales quantity (K Sqm), and ASP (US\$/Sq m), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Carbon Fiber Raw Paper

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Carbon Fiber Raw Paper market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key

companies covered as a part of this study include Toray Industries?Japan?, SGL Carbon?Germany?, AvCarb?United States?, JNTG?South Korea?, CAPLINQ?Netherlands?, CeTech?Taiwan, China?, Shanghai Tanji Material?China?, Linkfiber Technology?China?, KBC?China?, LNnewpower Technology?China?, etc.

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

Market Segmentation

Carbon Fiber Raw Paper market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Wet-laid Process

Dry-laid Process

Market segment by Thickness

Thin-grade (?180 ?m)

Medium-thickness Grade (181-250 ?m)

Thick-grade (>250 ?m)

Market segment by Application

Fuel Cell

Water Electrolysis

Others

Major players covered

Toray Industries?Japan?

SGL Carbon?Germany?

AvCarb?United States?

JNTG?South Korea?

CAPLINQ?Netherlands?

CeTech?Taiwan, China?

Shanghai Tanji Material?China?

Linkfiber Technology?China?

KBC?China?

LNnewpower Technology?China?

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Carbon Fiber Raw Paper product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Carbon Fiber Raw Paper, with price, sales quantity, revenue, and global market share of Carbon Fiber Raw Paper from 2021 to 2026.

Chapter 3, the Carbon Fiber Raw Paper competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Carbon Fiber Raw Paper breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Carbon Fiber Raw Paper market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Carbon Fiber Raw Paper.

Chapter 14 and 15, to describe Carbon Fiber Raw Paper sales channel, distributors, customers, research findings and conclusion.

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