

# Global Hydrogen Energy Carbon Paper Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Hydrogen Energy Carbon Paper market size is expected to reach \$ 2981 million by 2032, rising at a market growth of 19.8% CAGR during the forecast period (2026-2032).

Carbon paper is an advanced two-dimensional material made from carbon fibers. As a key fundamental material, it has a wide range of applications. In the hydrogen energy field, it can be used as a gas diffusion layer material for fuel cells and a diffusion layer material for proton exchange membrane electrolyzers. In the energy storage field, it can be used as an electrode material for flow batteries. The main functions of hydrogen-energy carbon paper include uniform gas diffusion, electron conduction, thermal management, and water transport, thereby improving the power density, efficiency, and durability of fuel cells and electrolyzer stacks. Typical product forms are sheets or rolls, with a thickness of approximately 100–400  $\mu\text{m}$  and a porosity of generally 70%–80%. The surface hydrophobic/hydrophilic properties and conductivity can be optimized according to application requirements to balance gas/liquid transport performance and mechanical strength. The core technologies include carbon fiber network structure design, thermal carbonization/graphitization treatment, and surface functional coatings to achieve stable operation of high-power-density fuel cells, proton exchange membrane electrolyzers (PEM Electrolyzers), and some flow battery systems. Hydrogen-energy carbon paper is an indispensable basic material in PEMFC, PEM electrolyzer, and flow battery systems. The core raw materials for carbon paper production are carbon fiber, polyvinyl alcohol resin, and phenolic resin. Carbon paper production processes are divided into wet and dry processes. The wet process is a mature technology, used by manufacturers such as Toray and SGL Carbon. Wet-processed carbon paper exhibits good uniformity and a dense structure, making it a commonly used method for high-performance carbon paper in fuel cells abroad. Dry-process

carbon paper production is a rapidly developing technology in recent years. This method uses air as a medium, employing an airflow web-forming process to create the base paper, followed by subsequent processes such as sizing, drying, and carbonization. Its characteristics include a high carbon fiber content and high product strength.

In 2025, the global production of Hydrogen Energy Carbon Paper was approximately 11.394 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%.

**Current and Existing Production Capacity:**

SPIC Hydrogen Energy Technology Development Co., Ltd. has a 300,000<sup>m<sup>2</sup></sup> annual production line for its 'SPIC' carbon paper.

Shanghai Tanji Industrial Group Co., Ltd. achieved sales of over 10,000 square meters of roll carbon paper in 2024.

Li Neng New Energy Technology (Beijing) Co., Ltd. has invested RMB 104 million to build a carbon paper material manufacturing base and engineering technology R&D center in Huangcun Town. Upon completion, its carbon paper production line will have a capacity of 720,000<sup>m<sup>2</sup></sup>/year, making it one of the largest high-performance carbon fiber two-dimensional material production bases in China.

KBC Corporation, Ltd. is expanding into the hydrogen fuel cell carbon paper sector, planning to build a 300,000<sup>m<sup>2</sup></sup> production capacity. Roll carbon paper production began in the first half of 2023, and the sheet carbon paper production line has been completed and is supplying in batches.

Shandong Renfeng Special Materials Co., Ltd.'s 1.5 million m<sup>2</sup>/year GDL gas diffusion layer production line has been included in Zibo City's '14th Five-Year Plan' for major hydrogen energy industry demonstration projects and Shandong Province's key energy sector technology research projects. The first phase, a 500,000 m<sup>2</sup> production line, has been completed and put into operation.

In 2023, Suzhou Tianshang Anneng Carbon Material Technology Co., Ltd. began construction of a 100,000 m<sup>2</sup>/year carbon paper (sheet) production line and the production of high-performance carbon paper products.

The essence of the hydrogen energy carbon paper industry lies in providing efficient and stable gas diffusion and electron conduction media for fuel cells and hydrogen electrolyzers. As a key basic material within membrane electrode assemblies (MEAs), carbon paper achieves uniform distribution of hydrogen and oxygen through its porous carbon fiber network, while also undertaking electron conduction, thermal management, and water management functions, significantly improving the power density and lifespan of fuel cell stacks. The industry has clear boundaries, mainly covering PEMFCs, PEM electrolyzers, and some flow battery systems, providing core material support for downstream electric transportation, stationary energy storage, and portable hydrogen energy devices.

From a supply perspective, global hydrogen energy carbon paper production is characterized by high technological barriers and regional concentration. North America, Europe, and East Asia are the core production areas, with major suppliers exhibiting differentiated product offerings in terms of thickness, porosity, conductivity, and surface treatment methods.

From a demand structure perspective, downstream growth primarily stems from the expansion of transportation, stationary energy storage, and portable hydrogen energy equipment. Global hydrogen energy policy initiatives and the increasing penetration rate of fuel cell vehicles, coupled with the continued rise in demand from energy storage and industrial hydrogen production markets, are driving the diversification of carbon paper specifications and steady production growth. Simultaneously, the application of high-performance carbon paper in high-power-density fuel cells and long-life energy storage systems is driving technological iterations in thickness optimization, porosity control, and surface functionalization.

From a product roadmap and technology evolution perspective, the industry is undergoing multi-level material upgrades, including carbon fiber matrix optimization, refined resin impregnation and heat treatment, and exploration of surface functional coatings and composite functionalization. Regional supply chain migration, capacity expansion, and capital expenditure dynamics are impacting the global supply-demand balance and price system. In the future, the industry will continue to develop towards high performance, low cost, and long lifespan, but attention still needs to be paid to the potential localized substitution pressure from alternative materials (such as metal mesh diffusion layers or conductive composite films).

This report studies the global Hydrogen Energy Carbon Paper production, demand, key

manufacturers, and key regions.

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

Highlights and key features of the study

Global Hydrogen Energy Carbon Paper total production and demand, 2021-2032, (K Sqm)

Global Hydrogen Energy Carbon Paper total production value, 2021-2032, (USD Million)

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

Global Hydrogen Energy Carbon Paper consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Hydrogen Energy Carbon Paper domestic production, consumption, key domestic manufacturers and share

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

Global Hydrogen Energy Carbon Paper production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Hydrogen Energy Carbon Paper production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Hydrogen Energy Carbon Paper 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 Hydrogen Energy Carbon Paper 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 Hydrogen Energy Carbon Paper Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Hydrogen Energy Carbon Paper Market, Segmentation by Type:

Wet Process Carbon Paper

Dry Process Carbon Paper

### Global Hydrogen Energy Carbon Paper Market, Segmentation by Thickness:

200–300 ?m

> 300 ?m

### Global Hydrogen Energy Carbon Paper Market, Segmentation by Surface Treatment:

PTFE Hydrophobic

Non-Hydrophobic

### Global Hydrogen Energy Carbon Paper Market, Segmentation by Product Form:

Sheets

Rolls

### Global Hydrogen Energy Carbon Paper Market, Segmentation by Application:

Fuel Cell Gas Diffusion Layer

PEM Electrolyzer Diffusion Layer

Redox Flow Battery Electrode

Other

### 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 Hydrogen Energy Carbon Paper market?
2. What is the demand of the global Hydrogen Energy Carbon Paper market?
3. What is the year over year growth of the global Hydrogen Energy Carbon Paper

market?

4. What is the production and production value of the global Hydrogen Energy Carbon Paper market?
5. Who are the key producers in the global Hydrogen Energy Carbon Paper market?
6. What are the growth factors driving the market demand?

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