

Global Solid–Liquid Hybrid Capacitor 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 Solid–Liquid Hybrid Capacitor market size was valued at US\$ 721 million in 2025 and is forecast to a readjusted size of US\$ 1191 million by 2032 with a CAGR of 7.9% during review period.

In 2025, the global solid–liquid hybrid capacitor market is estimated at approximately 4.67 billion units, with an average selling price of around USD 0.15 per unit (approximately RMB 1.1 per unit). Solid–liquid hybrid capacitors combine the advantages of solid polymer capacitors and liquid electrolytic capacitors, typically using conductive polymers as the primary electrolyte with a small amount of liquid electrolyte. This enables low ESR, excellent high-frequency performance, and strong thermal stability, while significantly improving lifetime and reliability. These products are widely used in electric vehicles, power management systems, ICT equipment, industrial electronics, and high-reliability applications. The structure includes aluminum electrode systems, conductive polymer systems, auxiliary electrolyte systems, separator paper, and packaging structures, with variations in temperature resistance, lifetime, and vibration resistance. Mainstream products are typically rated up to 135°C, with ongoing development toward capabilities exceeding 200°C.

Solid–liquid hybrid capacitors are currently in a critical transition phase, moving from the technology introduction stage toward large-scale expansion. Their growth logic is not driven by a single industry, but by the superposition of three structural forces that together form an explosive demand curve. First, the rapid development of new energy vehicles (NEVs) is the most fundamental and core demand driver at present, accounting for more than 60% of total demand. More importantly, beyond incremental demand, a substitution effect is accelerating: many application scenarios that previously used solid

capacitors are systematically shifting toward hybrid capacitors. At the same time, the increasing complexity of EV electronic and electrical architectures (including electric drive, power control, BMS, and OBC systems) is further raising requirements for low ESR, high reliability, and high temperature stability, making hybrid capacitors an important upgrade component in onboard power systems. Therefore, EVs are not only the largest market but also the most stable and deterministic underlying demand engine. The second key driver comes from AI data center servers, which is widely regarded as the most explosive variable for the industry after 2026. Starting from April 2026, demand for hybrid capacitors in AI servers is expected to be released at scale. Industry expectations suggest that a single leading platform (such as the NVIDIA ecosystem) may reach monthly procurement levels of around 15 million units (15KK). If AI server demand is fully unlocked, the total market size could reach 3–5 times that of the EV sector. This view has already been partially validated in the industry, as server OEMs in Taiwan and mainland China have begun large-scale adoption and ordering. Therefore, AI demand is no longer a forward-looking assumption but an ongoing structural expansion. The period from 2026 to 2032 is expected to be the most critical growth window, potentially reshaping the overall demand structure and making servers the second or even primary application segment after EVs. The third long-term driver is 6G communication infrastructure. Although large-scale deployment of 6G base stations and related equipment has not yet begun, the technological evolution path is already clear. Future base station upgrades and new deployments are expected to generate demand comparable to that of the EV sector. This segment has a longer cycle but extremely large scale, making it a typical infrastructure-level long-term growth driver. In addition to these three core drivers, demand from medical devices, consumer appliances, military systems, robotics, low-altitude economy (such as heavy-duty drones), and high-end industrial equipment is also steadily increasing. In particular, in high-temperature, high-voltage, vibration-resistant, and high-reliability environments, the substitution of traditional solid capacitors by hybrid capacitors is becoming increasingly evident. Although these segments are smaller individually compared to automotive and servers, together they form a “high-reliability long-tail demand” that continuously expands the industry boundary. On the supply side, the industry has rapidly expanded from fewer than 10 companies in the early stage to around 65 participants today. A large number of aluminum electrolytic capacitor and solid capacitor manufacturers are accelerating their entry, leading to intensified competition and structural expansion. Prices have declined rapidly from approximately RMB 10 at automotive-grade level to around RMB 1.5, with further potential decline to RMB 0.5 or even RMB 0.2 in the future. This process is fundamentally driven by scale expansion, intensifying competition, and process maturity. However, it is important to note that the current core competition is still not price-based, but centered on performance stability, process

capability, and rapid engineering adaptability. The industry is generally dominated by Japanese and Chinese players, with manufacturing and demand concentrated in East Asia, particularly China. European and US markets mainly focus on high-value applications such as automotive, medical, and high-end servers. The sales structure is dominated by direct sales (around 70%), with distributors accounting for about 30%, playing an important role in small-batch and multi-SKU supply. Due to the low unit price but extremely high cost of failure, customers generally prioritize quality over price and tend to adopt a multi-supplier strategy (typically 2–3 suppliers) for joint development and supply stability. From a technological evolution perspective, the industry continues to break through material system and process boundaries. Cost reductions in key raw materials such as electrolytes, separator paper, and polymers, combined with process improvements, are continuously enhancing product performance. In the future, temperature resistance is expected to exceed 200°C, enabling broader applications in aerospace, satellites, racing, and ultra-high-end servers. At the same time, due to rapid model iteration and frequently changing customer parameters, companies face extremely high requirements for process adaptability and R&D responsiveness, and not all suppliers are able to keep pace with such dynamic demand. Overall, solid–liquid hybrid capacitors have evolved from a single automotive electronics upgrade component into a foundational electronic component upgrade track driven jointly by NEVs, AI servers, and 6G infrastructure. Over the next 5–10 years, the industry is expected to experience sustained expansion and structural transformation.

This report is a detailed and comprehensive analysis for global Solid–Liquid Hybrid Capacitor 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 Solid–Liquid Hybrid Capacitor market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Solid–Liquid Hybrid Capacitor market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Solid–Liquid Hybrid Capacitor market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Solid–Liquid Hybrid Capacitor market shares of main players, shipments in revenue (\$ Million), sales quantity (Million Units), and ASP (US\$/Unit), 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 Solid–Liquid Hybrid Capacitor

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 Solid–Liquid Hybrid Capacitor 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 Panasonic, Nippon Chemi-Con, TAIYO YUDEN-EINA, Nichicon, TDK Electronics, Lelon Electronics, Zhuhai Gree Xinyuan Electronic, Nantong Jianghai Capacitor, Hunan Aihua Group, SUN Electronic Industries, etc.

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

Market Segmentation

Solid–Liquid Hybrid Capacitor 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

Automotive Grade

Industrial Grade

Market segment by Load Life

?2000H

2000-5000H

10000H

>10000H

Market segment by Voltage

?25v

25-35V

35-55v

?55v

Market segment by Capacitance

?220uf

220-330uf

330-470Uf

?470Uf

Market segment by Application

New Energy Vehicles (NEVs)

ICT

Medical Devices

Photovoltaics (PV)

Others

Major players covered

Panasonic

Nippon Chemi-Con

TAIYO YUDEN-EINA

Nichicon

TDK Electronics

Lelon Electronics

Zhuhai Gree Xinyuan Electronic

Nantong Jianghai Capacitor

Hunan Aihua Group

SUN Electronic Industries

Shanghai Yongming Electronic

DongGuan ChuangHui Electronics

Su'scon

Kaimei Electronic

Vishay

Samwha Electric

SAMYOUNG Electronic

Capxon Electronic Technology

Shenzhen PolyCap Electronic

Shenzhen Jianghao Electronics

Zhao Qing Beryl Electronic Technology

Zhuhai Leaguer Capacitor

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APAQ

KNSCHA ELECTRONICS

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KYOCERA AVX

VinaTech

Taiwan Chinsan Electronic Industrial

Toshin Kogyo

Cornell Dubilier

Jarson Group

jb Capacitors Company

W?rth Elektronik

Guangdong FOLLON Electronics Technology

Guangdong Fenghua Advanced Technology

Guizhou Yunrui Electronic Technology

Dongguan Honor Electronics

Dongguan Chengtao Electronics

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 Solid–Liquid Hybrid Capacitor product scope, market overview,

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market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Solid–Liquid Hybrid Capacitor, with price, sales quantity, revenue, and global market share of Solid–Liquid Hybrid Capacitor from 2021 to 2026.

Chapter 3, the Solid–Liquid Hybrid Capacitor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Solid–Liquid Hybrid Capacitor 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 Solid–Liquid Hybrid Capacitor 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 Solid–Liquid Hybrid Capacitor.

Chapter 14 and 15, to describe Solid–Liquid Hybrid Capacitor sales channel, distributors, customers, research findings and conclusion.

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