

Global Fuel Cell Proton Exchange Membrane Market Growth 2026-2032

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Abstracts

The global Fuel Cell Proton Exchange Membrane market size is predicted to grow from US\$ 98 million in 2025 to US\$ 154 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

Proton Exchange Membrane (PEM) is a special semipermeable membrane designed primarily for conducting protons while acting as an electronic insulator and a barrier to reactants. It is usually made of high molecular polymer materials that can maintain high proton conductivity and chemical stability under specific chemical environments. The basic function of this membrane in a proton exchange membrane fuel cell (PEMFC) is to separate reactants and transport protons while preventing direct conduction of electrons through the membrane. Its performance directly affects the efficiency and life of the fuel cell.

Although the global fuel cell proton membrane market is expected to expand steadily, the phased cooling of the hydrogen fuel vehicle field has brought structural challenges to the industry. The decline in Toyota's hydrogen energy vehicle sales in 2022 and the halving of Hyundai's sales in 2023 exposed the uncertainty of the terminal application market, which was mainly restricted by factors such as the decline in policy subsidies, the rise in hydrogen energy prices, the lack of hydrogen station infrastructure and low consumer acceptance. At present, automotive fuel cells still account for 78.29% of the application share of proton membranes, but the growth rate of this scenario may be lower than expected in the short term. The technical monopoly of perfluorosulfonic acid membranes (market share of 97.96%) continues to consolidate, and its high proton conductivity and durability have become the mainstream choice, with a low risk of technical substitution. It is worth noting that the demand potential of non-automotive scenarios (such as fixed power generation, aviation and ships, etc.) may become a

breakthrough in future increments, promoting the market to form a diversified application pattern.

As the world's largest consumer market (accounting for 41.56% in 2024) and the fastest-growing production base (production share will reach 30.72% in 2031), China is reshaping the industry landscape through policy support and capacity expansion. Although the American company Gore still dominates the supply of high-end membranes (accounting for 69.15% of the world in 2024), Chinese manufacturers such as Dongyue Future and Wuhan Green Dynamic Hydrogen Energy Technology have risen rapidly with cost advantages and localized services, pushing the localization rate from 19.73% to 30%. This process has benefited from the strengthening of China's top-level design of the hydrogen energy industry, including the key support for core membrane electrode materials in the '14th Five-Year Plan' hydrogen energy plan.

The current fuel cell proton membrane industry faces dual pressures: the lack of economic efficiency of upstream hydrogen energy restricts the release of terminal demand, and the swaying technology route of downstream car companies increases supply chain risks. The high cost of hydrogen station construction (investment in a single station exceeds 10 million) and the bottleneck of hydrogen storage and transportation technology have limited application scenarios, which need to be alleviated through technical breakthroughs such as large-scale production of green hydrogen and ammonia hydrogen carriers. On the production side, the core raw material perfluorosulfonic acid resin is still monopolized by overseas giants. Although Chinese manufacturers have made progress in film-forming technology, the localization rate of raw materials is insufficient, which has become a shortcoming in cost control. Future industry competition will focus on the dual-wheel drive of 'technological cost reduction + application expansion': on the one hand, the unit price will be reduced by thinning the membrane thickness (evolving from 20 μ m to 10 μ m) and mass production; on the other hand, it is necessary to explore the application scenarios of heavy-duty vehicles such as ships and rail transit to disperse the risk of over-reliance on the automotive market. In this process, companies with vertical integration capabilities (such as Wuhan Green Dynamic Hydrogen Energy Technology's covering resin-membrane-membrane electrode) and cross-border cooperation resources will be more resilient against cycles.

LP Information, Inc. (LPI) ' newest research report, the "Fuel Cell Proton Exchange Membrane Industry Forecast" looks at past sales and reviews total world Fuel Cell Proton Exchange Membrane sales in 2025, providing a comprehensive analysis by region and market sector of projected Fuel Cell Proton Exchange Membrane sales for

2026 through 2032. With Fuel Cell Proton Exchange Membrane sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Fuel Cell Proton Exchange Membrane industry.

This Insight Report provides a comprehensive analysis of the global Fuel Cell Proton Exchange Membrane landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Fuel Cell Proton Exchange Membrane portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fuel Cell Proton Exchange Membrane market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fuel Cell Proton Exchange Membrane and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fuel Cell Proton Exchange Membrane.

This report presents a comprehensive overview, market shares, and growth opportunities of Fuel Cell Proton Exchange Membrane market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Perfluorosulfonic Acid Membrane

Partially Fluorinated Polymer Membrane

Other

Segmentation by Application:

Fuel Cell Vehicles

Stationary Power Generation

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Gore

Chemours

Dongyue Future Hydrogen Energy Materials

Wuhan Green Dynamic Hydrogen Energy Technology

FUMATECH BWT

Ballard

Suzhou Kerun New Materials

Hancheng Industrial

Hynerchi Technology

BASF

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fuel Cell Proton Exchange Membrane market?

What factors are driving Fuel Cell Proton Exchange Membrane market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Fuel Cell Proton Exchange Membrane market opportunities vary by end market size?

How does Fuel Cell Proton Exchange Membrane break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Fuel Cell Proton Exchange Membrane Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Fuel Cell Proton Exchange Membrane by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Fuel Cell Proton Exchange Membrane by Country/Region, 2021, 2025 & 2032

2.2 Fuel Cell Proton Exchange Membrane Segment by Type

- 2.2.1 Perfluorosulfonic Acid Membrane
- 2.2.2 Partially Fluorinated Polymer Membrane
- 2.2.3 Other
- 2.2.4 Fuel Cell Proton Exchange Membrane Sales by Type
 - 2.2.4.1 Global Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Fuel Cell Proton Exchange Membrane Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Fuel Cell Proton Exchange Membrane Sale Price by Type (2021-2026)

2.3 Fuel Cell Proton Exchange Membrane Segment by Application

- 2.3.1 Fuel Cell Vehicles
- 2.3.2 Stationary Power Generation
- 2.3.3 Other
- 2.3.4 Fuel Cell Proton Exchange Membrane Sales by Application
 - 2.3.4.1 Global Fuel Cell Proton Exchange Membrane Sale Market Share by Application (2021-2026)
 - 2.3.4.2 Global Fuel Cell Proton Exchange Membrane Revenue and Market Share by

Application (2021-2026)

2.3.4.3 Global Fuel Cell Proton Exchange Membrane Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Fuel Cell Proton Exchange Membrane Breakdown Data by Company

3.1.1 Global Fuel Cell Proton Exchange Membrane Annual Sales by Company (2021-2026)

3.1.2 Global Fuel Cell Proton Exchange Membrane Sales Market Share by Company (2021-2026)

3.2 Global Fuel Cell Proton Exchange Membrane Annual Revenue by Company (2021-2026)

3.2.1 Global Fuel Cell Proton Exchange Membrane Revenue by Company (2021-2026)

3.2.2 Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Company (2021-2026)

3.3 Global Fuel Cell Proton Exchange Membrane Sale Price by Company

3.4 Key Manufacturers Fuel Cell Proton Exchange Membrane Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Fuel Cell Proton Exchange Membrane Product Location Distribution

3.4.2 Players Fuel Cell Proton Exchange Membrane Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR FUEL CELL PROTON EXCHANGE MEMBRANE BY GEOGRAPHIC REGION

4.1 World Historic Fuel Cell Proton Exchange Membrane Market Size by Geographic Region (2021-2026)

4.1.1 Global Fuel Cell Proton Exchange Membrane Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Fuel Cell Proton Exchange Membrane Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Fuel Cell Proton Exchange Membrane Market Size by

Country/Region (2021-2026)

4.2.1 Global Fuel Cell Proton Exchange Membrane Annual Sales by Country/Region (2021-2026)

4.2.2 Global Fuel Cell Proton Exchange Membrane Annual Revenue by Country/Region (2021-2026)

4.3 Americas Fuel Cell Proton Exchange Membrane Sales Growth

4.4 APAC Fuel Cell Proton Exchange Membrane Sales Growth

4.5 Europe Fuel Cell Proton Exchange Membrane Sales Growth

4.6 Middle East & Africa Fuel Cell Proton Exchange Membrane Sales Growth

5 AMERICAS

5.1 Americas Fuel Cell Proton Exchange Membrane Sales by Country

5.1.1 Americas Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026)

5.1.2 Americas Fuel Cell Proton Exchange Membrane Revenue by Country (2021-2026)

5.2 Americas Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026)

5.3 Americas Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Fuel Cell Proton Exchange Membrane Sales by Region

6.1.1 APAC Fuel Cell Proton Exchange Membrane Sales by Region (2021-2026)

6.1.2 APAC Fuel Cell Proton Exchange Membrane Revenue by Region (2021-2026)

6.2 APAC Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026)

6.3 APAC Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Fuel Cell Proton Exchange Membrane by Country

7.1.1 Europe Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026)

7.1.2 Europe Fuel Cell Proton Exchange Membrane Revenue by Country (2021-2026)

7.2 Europe Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026)

7.3 Europe Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Fuel Cell Proton Exchange Membrane by Country

8.1.1 Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026)

8.1.2 Middle East & Africa Fuel Cell Proton Exchange Membrane Revenue by Country (2021-2026)

8.2 Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026)

8.3 Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Fuel Cell Proton Exchange Membrane

10.3 Manufacturing Process Analysis of Fuel Cell Proton Exchange Membrane

10.4 Industry Chain Structure of Fuel Cell Proton Exchange Membrane

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Fuel Cell Proton Exchange Membrane Distributors

11.3 Fuel Cell Proton Exchange Membrane Customer

12 WORLD FORECAST REVIEW FOR FUEL CELL PROTON EXCHANGE MEMBRANE BY GEOGRAPHIC REGION

12.1 Global Fuel Cell Proton Exchange Membrane Market Size Forecast by Region

12.1.1 Global Fuel Cell Proton Exchange Membrane Forecast by Region (2027-2032)

12.1.2 Global Fuel Cell Proton Exchange Membrane Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Fuel Cell Proton Exchange Membrane Forecast by Type (2027-2032)

12.7 Global Fuel Cell Proton Exchange Membrane Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Gore

13.1.1 Gore Company Information

13.1.2 Gore Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.1.3 Gore Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Gore Main Business Overview

13.1.5 Gore Latest Developments

13.2 Chemours

13.2.1 Chemours Company Information

13.2.2 Chemours Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.2.3 Chemours Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Chemours Main Business Overview

13.2.5 Chemours Latest Developments

13.3 Dongyue Future Hydrogen Energy Materials

13.3.1 Dongyue Future Hydrogen Energy Materials Company Information

13.3.2 Dongyue Future Hydrogen Energy Materials Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.3.3 Dongyue Future Hydrogen Energy Materials Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Dongyue Future Hydrogen Energy Materials Main Business Overview

13.3.5 Dongyue Future Hydrogen Energy Materials Latest Developments

13.4 Wuhan Green Dynamic Hydrogen Energy Technology

13.4.1 Wuhan Green Dynamic Hydrogen Energy Technology Company Information

13.4.2 Wuhan Green Dynamic Hydrogen Energy Technology Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.4.3 Wuhan Green Dynamic Hydrogen Energy Technology Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Wuhan Green Dynamic Hydrogen Energy Technology Main Business Overview

13.4.5 Wuhan Green Dynamic Hydrogen Energy Technology Latest Developments

13.5 FUMATECH BWT

13.5.1 FUMATECH BWT Company Information

13.5.2 FUMATECH BWT Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.5.3 FUMATECH BWT Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 FUMATECH BWT Main Business Overview

13.5.5 FUMATECH BWT Latest Developments

13.6 Ballard

13.6.1 Ballard Company Information

13.6.2 Ballard Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.6.3 Ballard Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Ballard Main Business Overview

13.6.5 Ballard Latest Developments

13.7 Suzhou Kerun New Materials

13.7.1 Suzhou Kerun New Materials Company Information

13.7.2 Suzhou Kerun New Materials Fuel Cell Proton Exchange Membrane Product

Portfolios and Specifications

13.7.3 Suzhou Kerun New Materials Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Suzhou Kerun New Materials Main Business Overview

13.7.5 Suzhou Kerun New Materials Latest Developments

13.8 Hancheng Industrial

13.8.1 Hancheng Industrial Company Information

13.8.2 Hancheng Industrial Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.8.3 Hancheng Industrial Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Hancheng Industrial Main Business Overview

13.8.5 Hancheng Industrial Latest Developments

13.9 Hynerchi Technology

13.9.1 Hynerchi Technology Company Information

13.9.2 Hynerchi Technology Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.9.3 Hynerchi Technology Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Hynerchi Technology Main Business Overview

13.9.5 Hynerchi Technology Latest Developments

13.10 BASF

13.10.1 BASF Company Information

13.10.2 BASF Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

13.10.3 BASF Fuel Cell Proton Exchange Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 BASF Main Business Overview

13.10.5 BASF Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Fuel Cell Proton Exchange Membrane Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Fuel Cell Proton Exchange Membrane Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Perfluorosulfonic Acid Membrane

Table 4. Major Players of Partially Fluorinated Polymer Membrane

Table 5. Major Players of Other

Table 6. Global Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026) & (K Sqm)

Table 7. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)

Table 8. Global Fuel Cell Proton Exchange Membrane Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Type (2021-2026)

Table 10. Global Fuel Cell Proton Exchange Membrane Sale Price by Type (2021-2026) & (US\$/Sq m)

Table 11. Global Fuel Cell Proton Exchange Membrane Sale by Application (2021-2026) & (K Sqm)

Table 12. Global Fuel Cell Proton Exchange Membrane Sale Market Share by Application (2021-2026)

Table 13. Global Fuel Cell Proton Exchange Membrane Revenue by Application (2021-2026) & (\$ million)

Table 14. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Application (2021-2026)

Table 15. Global Fuel Cell Proton Exchange Membrane Sale Price by Application (2021-2026) & (US\$/Sq m)

Table 16. Global Fuel Cell Proton Exchange Membrane Sales by Company (2021-2026) & (K Sqm)

Table 17. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Company (2021-2026)

Table 18. Global Fuel Cell Proton Exchange Membrane Revenue by Company (2021-2026) & (\$ millions)

Table 19. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Company (2021-2026)

Table 20. Global Fuel Cell Proton Exchange Membrane Sale Price by Company (2021-2026) & (US\$/Sq m)

Table 21. Key Manufacturers Fuel Cell Proton Exchange Membrane Producing Area Distribution and Sales Area

Table 22. Players Fuel Cell Proton Exchange Membrane Products Offered

Table 23. Fuel Cell Proton Exchange Membrane Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 24. New Products and Potential Entrants

Table 25. Market M&A Activity & Strategy

Table 26. Global Fuel Cell Proton Exchange Membrane Sales by Geographic Region (2021-2026) & (K Sqm)

Table 27. Global Fuel Cell Proton Exchange Membrane Sales Market Share Geographic Region (2021-2026)

Table 28. Global Fuel Cell Proton Exchange Membrane Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 29. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Geographic Region (2021-2026)

Table 30. Global Fuel Cell Proton Exchange Membrane Sales by Country/Region (2021-2026) & (K Sqm)

Table 31. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Country/Region (2021-2026)

Table 32. Global Fuel Cell Proton Exchange Membrane Revenue by Country/Region (2021-2026) & (\$ millions)

Table 33. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Country/Region (2021-2026)

Table 34. Americas Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026) & (K Sqm)

Table 35. Americas Fuel Cell Proton Exchange Membrane Sales Market Share by Country (2021-2026)

Table 36. Americas Fuel Cell Proton Exchange Membrane Revenue by Country (2021-2026) & (\$ millions)

Table 37. Americas Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026) & (K Sqm)

Table 38. Americas Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026) & (K Sqm)

Table 39. APAC Fuel Cell Proton Exchange Membrane Sales by Region (2021-2026) & (K Sqm)

Table 40. APAC Fuel Cell Proton Exchange Membrane Sales Market Share by Region (2021-2026)

- Table 41. APAC Fuel Cell Proton Exchange Membrane Revenue by Region (2021-2026) & (\$ millions)
- Table 42. APAC Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026) & (K Sqm)
- Table 43. APAC Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026) & (K Sqm)
- Table 44. Europe Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026) & (K Sqm)
- Table 45. Europe Fuel Cell Proton Exchange Membrane Revenue by Country (2021-2026) & (\$ millions)
- Table 46. Europe Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026) & (K Sqm)
- Table 47. Europe Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026) & (K Sqm)
- Table 48. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Country (2021-2026) & (K Sqm)
- Table 49. Middle East & Africa Fuel Cell Proton Exchange Membrane Revenue Market Share by Country (2021-2026)
- Table 50. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Type (2021-2026) & (K Sqm)
- Table 51. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales by Application (2021-2026) & (K Sqm)
- Table 52. Key Market Drivers & Growth Opportunities of Fuel Cell Proton Exchange Membrane
- Table 53. Key Market Challenges & Risks of Fuel Cell Proton Exchange Membrane
- Table 54. Key Industry Trends of Fuel Cell Proton Exchange Membrane
- Table 55. Fuel Cell Proton Exchange Membrane Raw Material
- Table 56. Key Suppliers of Raw Materials
- Table 57. Fuel Cell Proton Exchange Membrane Distributors List
- Table 58. Fuel Cell Proton Exchange Membrane Customer List
- Table 59. Global Fuel Cell Proton Exchange Membrane Sales Forecast by Region (2027-2032) & (K Sqm)
- Table 60. Global Fuel Cell Proton Exchange Membrane Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 61. Americas Fuel Cell Proton Exchange Membrane Sales Forecast by Country (2027-2032) & (K Sqm)
- Table 62. Americas Fuel Cell Proton Exchange Membrane Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 63. APAC Fuel Cell Proton Exchange Membrane Sales Forecast by Region

(2027-2032) & (K Sqm)

Table 64. APAC Fuel Cell Proton Exchange Membrane Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 65. Europe Fuel Cell Proton Exchange Membrane Sales Forecast by Country (2027-2032) & (K Sqm)

Table 66. Europe Fuel Cell Proton Exchange Membrane Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 67. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales Forecast by Country (2027-2032) & (K Sqm)

Table 68. Middle East & Africa Fuel Cell Proton Exchange Membrane Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 69. Global Fuel Cell Proton Exchange Membrane Sales Forecast by Type (2027-2032) & (K Sqm)

Table 70. Global Fuel Cell Proton Exchange Membrane Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 71. Global Fuel Cell Proton Exchange Membrane Sales Forecast by Application (2027-2032) & (K Sqm)

Table 72. Global Fuel Cell Proton Exchange Membrane Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 73. Gore Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 74. Gore Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 75. Gore Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 76. Gore Main Business

Table 77. Gore Latest Developments

Table 78. Chemours Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 79. Chemours Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 80. Chemours Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 81. Chemours Main Business

Table 82. Chemours Latest Developments

Table 83. Dongyue Future Hydrogen Energy Materials Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 84. Dongyue Future Hydrogen Energy Materials Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 85. Dongyue Future Hydrogen Energy Materials Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 86. Dongyue Future Hydrogen Energy Materials Main Business

Table 87. Dongyue Future Hydrogen Energy Materials Latest Developments

Table 88. Wuhan Green Dynamic Hydrogen Energy Technology Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 89. Wuhan Green Dynamic Hydrogen Energy Technology Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 90. Wuhan Green Dynamic Hydrogen Energy Technology Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 91. Wuhan Green Dynamic Hydrogen Energy Technology Main Business

Table 92. Wuhan Green Dynamic Hydrogen Energy Technology Latest Developments

Table 93. FUMATECH BWT Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 94. FUMATECH BWT Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 95. FUMATECH BWT Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 96. FUMATECH BWT Main Business

Table 97. FUMATECH BWT Latest Developments

Table 98. Ballard Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 99. Ballard Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 100. Ballard Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 101. Ballard Main Business

Table 102. Ballard Latest Developments

Table 103. Suzhou Kerun New Materials Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 104. Suzhou Kerun New Materials Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 105. Suzhou Kerun New Materials Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 106. Suzhou Kerun New Materials Main Business

Table 107. Suzhou Kerun New Materials Latest Developments

Table 108. Hancheng Industrial Basic Information, Fuel Cell Proton Exchange

Membrane Manufacturing Base, Sales Area and Its Competitors

Table 109. Hancheng Industrial Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 110. Hancheng Industrial Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 111. Hancheng Industrial Main Business

Table 112. Hancheng Industrial Latest Developments

Table 113. Hynerchi Technology Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 114. Hynerchi Technology Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 115. Hynerchi Technology Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 116. Hynerchi Technology Main Business

Table 117. Hynerchi Technology Latest Developments

Table 118. BASF Basic Information, Fuel Cell Proton Exchange Membrane Manufacturing Base, Sales Area and Its Competitors

Table 119. BASF Fuel Cell Proton Exchange Membrane Product Portfolios and Specifications

Table 120. BASF Fuel Cell Proton Exchange Membrane Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 121. BASF Main Business

Table 122. BASF Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Fuel Cell Proton Exchange Membrane
- Figure 2. Fuel Cell Proton Exchange Membrane Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Fuel Cell Proton Exchange Membrane Sales Growth Rate 2021-2032 (K Sqm)
- Figure 7. Global Fuel Cell Proton Exchange Membrane Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Fuel Cell Proton Exchange Membrane Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Fuel Cell Proton Exchange Membrane Sales Market Share by Country/Region (2025)
- Figure 10. Fuel Cell Proton Exchange Membrane Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Perfluorosulfonic Acid Membrane
- Figure 12. Product Picture of Partially Fluorinated Polymer Membrane
- Figure 13. Product Picture of Other
- Figure 14. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Type in 2026
- Figure 15. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Type (2021-2026)
- Figure 16. Fuel Cell Proton Exchange Membrane Consumed in Fuel Cell Vehicles
- Figure 17. Global Fuel Cell Proton Exchange Membrane Market: Fuel Cell Vehicles (2021-2026) & (K Sqm)
- Figure 18. Fuel Cell Proton Exchange Membrane Consumed in Stationary Power Generation
- Figure 19. Global Fuel Cell Proton Exchange Membrane Market: Stationary Power Generation (2021-2026) & (K Sqm)
- Figure 20. Fuel Cell Proton Exchange Membrane Consumed in Other
- Figure 21. Global Fuel Cell Proton Exchange Membrane Market: Other (2021-2026) & (K Sqm)
- Figure 22. Global Fuel Cell Proton Exchange Membrane Sale Market Share by Application (2025)
- Figure 23. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by

Application in 2026

Figure 24. Fuel Cell Proton Exchange Membrane Sales by Company in 2026 (K Sqm)

Figure 25. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Company in 2026

Figure 26. Fuel Cell Proton Exchange Membrane Revenue by Company in 2026 (\$ millions)

Figure 27. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Company in 2026

Figure 28. Global Fuel Cell Proton Exchange Membrane Sales Market Share by Geographic Region (2021-2026)

Figure 29. Global Fuel Cell Proton Exchange Membrane Revenue Market Share by Geographic Region in 2026

Figure 30. Americas Fuel Cell Proton Exchange Membrane Sales 2021-2026 (K Sqm)

Figure 31. Americas Fuel Cell Proton Exchange Membrane Revenue 2021-2026 (\$ millions)

Figure 32. APAC Fuel Cell Proton Exchange Membrane Sales 2021-2026 (K Sqm)

Figure 33. APAC Fuel Cell Proton Exchange Membrane Revenue 2021-2026 (\$ millions)

Figure 34. Europe Fuel Cell Proton Exchange Membrane Sales 2021-2026 (K Sqm)

Figure 35. Europe Fuel Cell Proton Exchange Membrane Revenue 2021-2026 (\$ millions)

Figure 36. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales 2021-2026 (K Sqm)

Figure 37. Middle East & Africa Fuel Cell Proton Exchange Membrane Revenue 2021-2026 (\$ millions)

Figure 38. Americas Fuel Cell Proton Exchange Membrane Sales Market Share by Country in 2026

Figure 39. Americas Fuel Cell Proton Exchange Membrane Revenue Market Share by Country (2021-2026)

Figure 40. Americas Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)

Figure 41. Americas Fuel Cell Proton Exchange Membrane Sales Market Share by Application (2021-2026)

Figure 42. United States Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 43. Canada Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 44. Mexico Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 45. Brazil Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 46. APAC Fuel Cell Proton Exchange Membrane Sales Market Share by Region in 2026

Figure 47. APAC Fuel Cell Proton Exchange Membrane Revenue Market Share by Region (2021-2026)

Figure 48. APAC Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)

Figure 49. APAC Fuel Cell Proton Exchange Membrane Sales Market Share by Application (2021-2026)

Figure 50. China Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 51. Japan Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 52. South Korea Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 53. Southeast Asia Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 54. India Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 55. Australia Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 56. China Taiwan Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 57. Europe Fuel Cell Proton Exchange Membrane Sales Market Share by Country in 2026

Figure 58. Europe Fuel Cell Proton Exchange Membrane Revenue Market Share by Country (2021-2026)

Figure 59. Europe Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)

Figure 60. Europe Fuel Cell Proton Exchange Membrane Sales Market Share by Application (2021-2026)

Figure 61. Germany Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 62. France Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 63. UK Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 64. Italy Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$

millions)

Figure 65. Russia Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 66. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales Market Share by Country (2021-2026)

Figure 67. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales Market Share by Type (2021-2026)

Figure 68. Middle East & Africa Fuel Cell Proton Exchange Membrane Sales Market Share by Application (2021-2026)

Figure 69. Egypt Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 70. South Africa Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 71. Israel Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 72. Turkey Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 73. GCC Countries Fuel Cell Proton Exchange Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 74. Manufacturing Cost Structure Analysis of Fuel Cell Proton Exchange Membrane in 2026

Figure 75. Manufacturing Process Analysis of Fuel Cell Proton Exchange Membrane

Figure 76. Industry Chain Structure of Fuel Cell Proton Exchange Membrane

Figure 77. Channels of Distribution

Figure 78. Global Fuel Cell Proton Exchange Membrane Sales Market Forecast by Region (2027-2032)

Figure 79. Global Fuel Cell Proton Exchange Membrane Revenue Market Share Forecast by Region (2027-2032)

Figure 80. Global Fuel Cell Proton Exchange Membrane Sales Market Share Forecast by Type (2027-2032)

Figure 81. Global Fuel Cell Proton Exchange Membrane Revenue Market Share Forecast by Type (2027-2032)

Figure 82. Global Fuel Cell Proton Exchange Membrane Sales Market Share Forecast by Application (2027-2032)

Figure 83. Global Fuel Cell Proton Exchange Membrane Revenue Market Share Forecast by Application (2027-2032)

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