

# Advanced Conductive Agents: Global Markets

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## Abstracts

### Summary:

A conductive agent is used to improve the charge and discharge performance of electrodes, or add conductivity or antistatic ability to polymers, coatings and other materials. Mainly driven by the fast-growing EV, motive batteries and fuel cell markets, the global conductive agent market will grow at a CAGR of REDACTED% from 2020 through 2025.

The market into two major segments: advanced conductive agents and conventional conductive agents.

Advanced conductive agents are CNTs and graphene.

Conventional conductive agents include carbon black, graphite, carbon fiber, petroleum coke, metals, and metal oxides.

CNTs and graphene will have strong growth in the next five years. They are considered to be advanced materials in this report.

Conventional materials will have steady but relatively slow growth in the next five years. Although carbon fibers, such as vapor grown carbon fibers (VGCF), are sometimes considered to be advanced materials, they are counted as conventional materials in this report to simplify analysis; as their market is small, this will not have a large effect on the results.

### Report Scope:

This report covers the following conductive agent materials used in batteries, fuel cells, supercapacitors, conductive or antistatic polymers, conductive or antistatic coatings, and electrical and electronic products -

CNTs.

Graphene.

Carbon black, including acetylene black, Ketjen black, channel black, furnace black, lamp black and thermal black.

Graphite.

Other carbons such as carbon fibers, petroleum coke and active carbon.

Metals such as metal fibers, silver powder, copper powder, fluorocarbon powder, aluminum powder and nickel powder.

Metal oxides such as stannic oxide (SnO<sub>2</sub>) and zinc oxide (ZnO).

Other materials including cationic antistatic agents and anionic antistatic agents such as quaternary ammonium compounds.

This report also examines conductive agents used in motive power batteries and fuel cells in the following types of electric vehicles (EVs), which is a fast-growing segment that will take 56.4% of the global conductive agent market by 2025 -

Passenger vehicles (sedans, microcars, SUVs, crossover SUVs, pickup trucks, sports cars).

Low-velocity vehicles (golf carts, neighborhood EVs, personal mobility devices).

Buses.

Commercial/industrial vehicles (material handling equipment, burden carriers, forklifts, trucks).

The numbers and weight of batteries and fuel cells used in these EVs are estimated and forecasted in this report.

Two other major types of electric vehicles are out of the scope of this report -

Scooters (two-wheelers, motorcycles, some three-wheelers).

Niche (military, self-driving vehicles, locomotives).

There are many types of batteries and fuel cells available in the market, but nearly all EV batteries/fuel cells and have one of four systems -

Lead-acid battery.

Nickel metal hydride battery.

Lithium-ion (including lithium polymer) battery.

Proton exchange membrane (PEM) fuel cell.

Materials used in automotive lithium-ion battery and PEM fuel cells will have strong growth in the next five years. Materials used in automotive lead-acid batteries and nickel metal hydride batteries will have slow growth in the next five years. In addition to the above four types, phosphoric acid fuel cells and other fuel cells may also be used in the automotive industry at commercial scale in the forecast period.

Batteries used for automotive starting, lighting and ignition are not considered to be motive batteries in this report.

### **Report Includes:**

165 data tables and 11 additional tables

An overview of the global market for advanced conductive agents within the fuel cell and batteries industry

Analyses of the global market trends with data from 2019 and 2020, and

projections of compound annual growth rates (CAGRs) through 2025

Estimation of the actual market size (both value and volumetric based data) and revenue forecasts (in dollar millions), and corresponding market share analysis on the basis of material type, end use and geographical region

Highlights of the new technological developments and major industry strategies with emphasis on the Chinese government subsidy policies to the EV industry, restructuring of the battery business, and a comparison between Chinese and the global markets

Patent review of conductive agents, and allotments of patents and corresponding shares by assignee country, application area, and year of grants

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COORSTEK  
DAZHAN  
DYNANONIC  
ENGINEERED FIBERS TECHNOLOGY LLC (FIBERS TECHNOLOGY)  
FANGDA CARBON NEW MATERIAL CO., LTD.  
HITACHI CHEMICAL  
HONJO CHEMICAL CORP.  
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NANO-C INC.  
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NEDSTACK FUEL CELL TECHNOLOGY  
NIPPON CARBON CO., LTD.  
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### COMPANIES MENTIONED

AKZO NOBEL

AOYU GRAPHITE GROUP

ARKEMA

ASBURY CARBONS

BTR NEW ENERGY MATERIALS INC.

CABOT CORP.

CNANO TECHNOLOGY

COORSTEK

DAZHAN

DYNANONIC

ENGINEERED FIBERS TECHNOLOGY LLC (FIBERS TECHNOLOGY)

FANGDA CARBON NEW MATERIAL CO., LTD.

HITACHI CHEMICAL

HONJO CHEMICAL CORP.

IMERYS GRAPHITE & CARBON

LG CHEM

mitsubishi rayon co., ltd. and mitsubishi chemical corp.

NANO-C INC.

Nanocyl S.A.

NANOXPLORE

NEDSTACK FUEL CELL TECHNOLOGY

NIPPON CARBON CO., LTD.



NTP  
PHILLIPS 66  
PORVAIR FUEL CELL TECHNOLOGY  
QINGDAO HAIDA GRAPHITE  
RAYMOR INDUSTRIES INC.  
SGL GROUP-THE CARBON COMPANY  
SHANSHAN TECHNOLOGY  
SHOWA DENKO K.K. (SDK)  
SUPERIOR GRAPHITE CO.  
Thomas Swan & Co., Ltd.  
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