

# Global Carbon-based Electrode Materials for Flow Batteries Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/GA8D2917739FEN.html>

Date: March 2026

Pages: 153

Price: US\$ 2,980.00 (Single User License)

ID: GA8D2917739FEN

## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Carbon-based Electrode Materials for Flow Batteries competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Electrode material is one of the key materials for flow batteries. Unlike lithium-ion batteries, in flow batteries, the energy storage active material is stored in the form of electrolyte in a storage tank outside the stack, and the electrode itself does not participate in electrochemical reactions, only providing a reaction site for the oxidation-reduction reactions of the positive and negative energy storage active materials. The electrode materials of flow batteries are mainly metal and carbon. At present, carbon based electrodes are the most commonly used electrode materials for flow batteries, mainly including graphite felt, carbon felt, graphite carbon paper, and graphite carbon cloth. The market drivers of carbon electrode materials for flow batteries mainly include: 1. Policy drive: a strategic tool for energy security and carbon neutrality goals. National strategic positioning. Flow batteries are listed as core technologies for energy security and carbon neutrality goals by many governments. China has clearly positioned flow batteries as a "national priority technology" to crack the impact of renewable energy volatility on the power grid. Local policies such as the "Implementation Plan for Promoting the High-Quality Development of the Vanadium Battery Energy Storage Industry" issued by Sichuan Province promote the cost reduction and efficiency improvement of the all-vanadium flow battery industry chain through financial subsidies, tax incentives and other means to form an industrial cluster. International competition needs. Against the background of the reshaping of the global energy landscape, flow batteries have become the key to breaking through the "green technology hegemony" of Europe and the United States. With its vanadium

resource advantages (accounting for 47% of global reserves) and patent accumulation (global flow battery patents accounted for 38% in 2023), China is expected to reshape global energy governance rules through technology output.

2. Technology-driven: two-way iteration of performance breakthrough and cost reduction

Material innovation and cost reduction

Graphite felt optimization: Through high-temperature graphitization treatment (above 2000°C), the resistivity of carbon felt is reduced to below 0.01 mΩ·cm, and the conductivity is increased by 50%. At the same time, the problem of increased brittleness is alleviated through composite structures (such as carbon felt and polymer composites).

Surface modification technology: Nitric acid oxidation treatment increases oxygen-containing functional groups, which increases the adsorption capacity of vanadium ions by 40%, and significantly improves the catalytic efficiency.

3. Process localization substitution

Industrial chain drive: upstream and downstream synergy and scale effect release

Full industrial chain integration

Upstream resources: Pangang Vanadium Titanium, Hesteel Co., Ltd. and other companies control 47% of the world's vanadium resources and ensure a stable supply of raw materials.

Midstream manufacturing: State Grid Yingda, Shanghai Electric and other companies have conquered the core component technologies such as stacks and electrolytes, and promoted the localization rate of all-vanadium liquid flow batteries to exceed 90%.

Downstream application: Dalian companies in Liaoning have built the world's largest vanadium liquid flow battery energy storage power station (1 GWh), verifying the feasibility of large-scale commercialization. The scale effect is evident. As the capacity of a single machine jumps from the megawatt level to the gigawatt level, the expansion of production scale and the optimization of manufacturing processes (such as automated production lines) have reduced the cost of battery systems.

IV. Market demand drive: the explosion of renewable energy and the rigid demand for long-term energy storage

Renewable energy distribution and storage demand

Diversified application scenarios

Grid side: The demand for peak-shaving and frequency regulation and power auxiliary services has surged, and flow batteries have become the core of building a "source-grid-load-storage" collaborative system.

User side: Distributed energy storage and microgrid construction are accelerating, such as the promotion of "photovoltaic + flow battery" microgrids in border and island areas.

Special fields: Military bases, data centers, etc. have an urgent need for high-safety energy storage, and the advantage of flow batteries without explosion risks is prominent.

V. Resource and environmental protection drive: circular economy and green premium

Resource recycling

Vanadium electrolyte can be 100% recycled, and the life of carbon electrode materials (such as graphite felt) exceeds 10 years, forming a "resource-product-renewable resource" closed loop. Vanadium-rich areas such as Xinjiang and Sichuan realize resource value-added through electrolyte recycling.

Environmental policy drive

Under the EU Carbon Border Tax (CBAM) and China's "dual carbon" goals, the

carbon emissions of liquid flow batteries throughout their life cycle are 30% lower than those of lithium batteries, and they receive an additional premium in green bidding. For example, in the bidding for European microgrid projects, the winning bid price of liquid flow batteries was 15% higher than that of lithium batteries due to their environmental advantages. The rapid growth of the market for carbon electrode materials for liquid flow batteries is the result of the resonance of five factors: policy support, technological breakthroughs, industrial chain collaboration, demand explosion, and resource environmental protection. With further cost reduction (target 0.1 yuan/kWh) and expansion of application scenarios, carbon electrode materials are expected to become the "infrastructure" of the next generation of energy storage technology and reshape the global energy landscape.

The global Carbon-based Electrode Materials for Flow Batteries market size was estimated at USD 69.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 59.60% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Carbon-based Electrode Materials for Flow Batteries market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Carbon-based Electrode Materials for Flow Batteries market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Carbon-based Electrode Materials for Flow Batteries market.

## **Global Carbon-based Electrode Materials for Flow Batteries Market: Market**

## **Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

## **Key Company**

Mige New Material  
Shenyang FLYING Carbon Fiber  
Liaoning Jingu Carbon Material  
CGT Carbon GmbH  
SGL Carbon  
CeTech  
Sichuan Junrui Carbon Fiber Materials  
CM Carbon  
JNTG  
ZH Energy Storage  
Tanji Group

## **Market Segmentation (by Type)**

Carbon Felt (CF)  
Graphite Felt (GF)  
Other

## **Market Segmentation (by Application)**

Vanadium Redox Flow Battery  
Mixed Flow Battery

## Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

## Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Carbon-based Electrode Materials for Flow Batteries Market

Overview of the regional outlook of the Carbon-based Electrode Materials for Flow Batteries Market:

## Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Carbon-based Electrode Materials for Flow Batteries Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan,

merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Carbon-based Electrode Materials for Flow Batteries, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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