

Global Carbon Electrode Materials for Flow Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Electrode Materials for Flow Battery market size is expected to reach \$ 260 million by 2032, rising at a market growth of 16.3% CAGR during the forecast period (2026-2032).

In 2025, global Carbon Electrode Materials for Flow Battery production reached approximately 2.03 million sqm, with an average global market price of around US\$41 per sqm. Carbon electrode materials for flow batteries mainly refer to carbon felt and graphite felt, which are porous structures made from carbon fibers through needling and thermal treatment. They exhibit large surface area, good electrical conductivity, and strong chemical stability, making them suitable as electrodes in systems such as vanadium redox flow batteries. Carbon felt features high porosity and flexibility, enabling efficient ion transport and electrolyte penetration. Graphite felt, produced by further high-temperature graphitization, provides higher electrical conductivity and enhanced corrosion resistance. Both materials serve as essential components that offer active sites for redox reactions and ensure long-term durability of flow batteries.

The global installed capacity of flow batteries continues to expand along with the energy transition process. The rigid growth of long-duration energy storage demand and targeted policy support from multiple countries jointly drive the industry to shift from demonstration application to large-scale commercial deployment. China lists flow batteries as a key development direction of new energy storage, issuing special plans and supporting policies to guide project implementation. The United States and the European Union support domestic technology R&D and capacity building through tax incentives and special industrial funds respectively, forming a multi-driven market pattern worldwide.

Carbon electrode materials are core functional components of flow battery stacks, which directly determine the energy efficiency and service life of batteries. Their market demand is highly correlated with the downstream installation pace. The industry continues to advance material modification and preparation process optimization, improving electrochemical performance while driving down costs. The global supply chain shows obvious regional agglomeration: the Asia-Pacific region forms major mass production capacity based on its mature carbon fiber industrial foundation, while European and American markets focus on high-end modification R&D and localized capacity layout.

In the long run, the continuous decline of flow battery system costs and the gradual expansion of application scenarios will bring sustained growth space for carbon electrode materials. Industry competition will gradually evolve into comprehensive competition of technical performance and cost control. Meanwhile, the localization trend of global supply chains and rising environmental compliance requirements will also exert a far-reaching influence on the global layout of material enterprises.

This report studies the global Carbon Electrode Materials for Flow Battery production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon Electrode Materials for Flow Battery 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 Carbon Electrode Materials for Flow Battery that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon Electrode Materials for Flow Battery total production and demand, 2021-2032, (K Sqm)

Global Carbon Electrode Materials for Flow Battery total production value, 2021-2032, (USD Million)

Global Carbon Electrode Materials for Flow Battery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Carbon Electrode Materials for Flow Battery consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Carbon Electrode Materials for Flow Battery domestic production,

consumption, key domestic manufacturers and share
Global Carbon Electrode Materials for Flow Battery production by manufacturer,
production, price, value and market share 2021-2026, (USD Million) & (K Sqm)
Global Carbon Electrode Materials for Flow Battery production by Type, production,
value, CAGR, 2021-2032, (USD Million) & (K Sqm)
Global Carbon Electrode Materials for Flow Battery production by Application,
production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Carbon Electrode Materials for Flow Battery 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 SGL Carbon, AvCarb, CGT Carbon, JNTG, BWF Tec, CeTech, Liaoning JinGu Carbon Materials, Sichuan Jiangyou Runsheng Graphite Felting, Jiangsu Mige New Material, Chemshine Carbon, 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 Carbon Electrode Materials for Flow Battery market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sqm) 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 Carbon Electrode Materials for Flow Battery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon Electrode Materials for Flow Battery Market, Segmentation by Type:

Graphite Felt

Carbon Felt

Global Carbon Electrode Materials for Flow Battery Market, Segmentation by Base Material:

PAN-based

Rayon-based

Others

Global Carbon Electrode Materials for Flow Battery Market, Segmentation by Thickness:

Thickness 6mm

Global Carbon Electrode Materials for Flow Battery Market, Segmentation by Application:

Vanadium Redox Flow Battery

Zinc-Bromine Flow Battery

Iron-Chromium Flow Battery

Others

Companies Profiled:

SGL Carbon

AvCarb

CGT Carbon

JNTG

BWF Tec

CeTech

Liaoning JinGu Carbon Materials

Sichuan Jiangyou Runsheng Graphite Felting

Jiangsu Mige New Material

Chemshine Carbon

Jiangsu Puxang EP Sci-Tech

Shenyang Fulai Carbon Fiber

Shanghai Qijie New Materials

Dalian LONGTIAN Tech

Shanghai Carbon Industry

Key Questions Answered:

1. How big is the global Carbon Electrode Materials for Flow Battery market?
2. What is the demand of the global Carbon Electrode Materials for Flow Battery market?
3. What is the year over year growth of the global Carbon Electrode Materials for Flow Battery market?
4. What is the production and production value of the global Carbon Electrode Materials for Flow Battery market?
5. Who are the key producers in the global Carbon Electrode Materials for Flow Battery market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Carbon Electrode Materials for Flow Battery Introduction

1.2 World Carbon Electrode Materials for Flow Battery Supply & Forecast

1.2.1 World Carbon Electrode Materials for Flow Battery Production Value (2021 & 2025 & 2032)

1.2.2 World Carbon Electrode Materials for Flow Battery Production (2021-2032)

1.2.3 World Carbon Electrode Materials for Flow Battery Pricing Trends (2021-2032)

1.3 World Carbon Electrode Materials for Flow Battery Production by Region (Based on Production Site)

1.3.1 World Carbon Electrode Materials for Flow Battery Production Value by Region (2021-2032)

1.3.2 World Carbon Electrode Materials for Flow Battery Production by Region (2021-2032)

1.3.3 World Carbon Electrode Materials for Flow Battery Average Price by Region (2021-2032)

1.3.4 North America Carbon Electrode Materials for Flow Battery Production (2021-2032)

1.3.5 Europe Carbon Electrode Materials for Flow Battery Production (2021-2032)

1.3.6 China Carbon Electrode Materials for Flow Battery Production (2021-2032)

1.3.7 South Korea Carbon Electrode Materials for Flow Battery Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Carbon Electrode Materials for Flow Battery Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Carbon Electrode Materials for Flow Battery Major Market Trends

2 DEMAND SUMMARY

2.1 World Carbon Electrode Materials for Flow Battery Demand (2021-2032)

2.2 World Carbon Electrode Materials for Flow Battery Consumption by Region

2.2.1 World Carbon Electrode Materials for Flow Battery Consumption by Region (2021-2026)

2.2.2 World Carbon Electrode Materials for Flow Battery Consumption Forecast by Region (2027-2032)

2.3 United States Carbon Electrode Materials for Flow Battery Consumption (2021-2032)

- 2.4 China Carbon Electrode Materials for Flow Battery Consumption (2021-2032)
- 2.5 Europe Carbon Electrode Materials for Flow Battery Consumption (2021-2032)
- 2.6 Japan Carbon Electrode Materials for Flow Battery Consumption (2021-2032)
- 2.7 South Korea Carbon Electrode Materials for Flow Battery Consumption (2021-2032)
- 2.8 ASEAN Carbon Electrode Materials for Flow Battery Consumption (2021-2032)
- 2.9 India Carbon Electrode Materials for Flow Battery Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Carbon Electrode Materials for Flow Battery Production Value by Manufacturer (2021-2026)
- 3.2 World Carbon Electrode Materials for Flow Battery Production by Manufacturer (2021-2026)
- 3.3 World Carbon Electrode Materials for Flow Battery Average Price by Manufacturer (2021-2026)
- 3.4 Carbon Electrode Materials for Flow Battery Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Carbon Electrode Materials for Flow Battery Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Carbon Electrode Materials for Flow Battery in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Carbon Electrode Materials for Flow Battery in 2025
- 3.6 Carbon Electrode Materials for Flow Battery Market: Overall Company Footprint Analysis
 - 3.6.1 Carbon Electrode Materials for Flow Battery Market: Region Footprint
 - 3.6.2 Carbon Electrode Materials for Flow Battery Market: Company Product Type Footprint
 - 3.6.3 Carbon Electrode Materials for Flow Battery Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Carbon Electrode Materials for Flow Battery Production Value Comparison

4.1.1 United States VS China: Carbon Electrode Materials for Flow Battery Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Carbon Electrode Materials for Flow Battery Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Carbon Electrode Materials for Flow Battery Production Comparison

4.2.1 United States VS China: Carbon Electrode Materials for Flow Battery Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Carbon Electrode Materials for Flow Battery Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Carbon Electrode Materials for Flow Battery Consumption Comparison

4.3.1 United States VS China: Carbon Electrode Materials for Flow Battery Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Carbon Electrode Materials for Flow Battery Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Carbon Electrode Materials for Flow Battery Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value (2021-2026)

4.4.3 United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production (2021-2026)

4.5 China Based Carbon Electrode Materials for Flow Battery Manufacturers and Market Share

4.5.1 China Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value (2021-2026)

4.5.3 China Based Manufacturers Carbon Electrode Materials for Flow Battery Production (2021-2026)

4.6 Rest of World Based Carbon Electrode Materials for Flow Battery Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery

Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery
Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Carbon Electrode Materials for Flow Battery Market Size Overview by Type:
2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Graphite Felt

5.2.2 Carbon Felt

5.3 Market Segment by Type

5.3.1 World Carbon Electrode Materials for Flow Battery Production by Type
(2021-2032)

5.3.2 World Carbon Electrode Materials for Flow Battery Production Value by Type
(2021-2032)

5.3.3 World Carbon Electrode Materials for Flow Battery Average Price by Type
(2021-2032)

6 MARKET ANALYSIS BY BASE MATERIAL

6.1 World Carbon Electrode Materials for Flow Battery Market Size Overview by Base
Material: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Base Material

6.2.1 PAN-based

6.2.2 Rayon-based

6.2.3 Others

6.3 Market Segment by Base Material

6.3.1 World Carbon Electrode Materials for Flow Battery Production by Base Material
(2021-2032)

6.3.2 World Carbon Electrode Materials for Flow Battery Production Value by Base
Material (2021-2032)

6.3.3 World Carbon Electrode Materials for Flow Battery Average Price by Base
Material (2021-2032)

7 MARKET ANALYSIS BY THICKNESS

7.1 World Carbon Electrode Materials for Flow Battery Market Size Overview by
Thickness: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Thickness

7.2.1 Thickness 6mm

7.3 Market Segment by Thickness

7.3.1 World Carbon Electrode Materials for Flow Battery Production by Thickness (2021-2032)

7.3.2 World Carbon Electrode Materials for Flow Battery Production Value by Thickness (2021-2032)

7.3.3 World Carbon Electrode Materials for Flow Battery Average Price by Thickness (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Carbon Electrode Materials for Flow Battery Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Vanadium Redox Flow Battery

8.2.2 Zinc-Bromine Flow Battery

8.2.3 Iron-Chromium Flow Battery

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Carbon Electrode Materials for Flow Battery Production by Application (2021-2032)

8.3.2 World Carbon Electrode Materials for Flow Battery Production Value by Application (2021-2032)

8.3.3 World Carbon Electrode Materials for Flow Battery Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 SGL Carbon

9.1.1 SGL Carbon Details

9.1.2 SGL Carbon Major Business

9.1.3 SGL Carbon Carbon Electrode Materials for Flow Battery Product and Services

9.1.4 SGL Carbon Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 SGL Carbon Recent Developments/Updates

9.1.6 SGL Carbon Competitive Strengths & Weaknesses

9.2 AvCarb

9.2.1 AvCarb Details

- 9.2.2 AvCarb Major Business
- 9.2.3 AvCarb Carbon Electrode Materials for Flow Battery Product and Services
- 9.2.4 AvCarb Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 AvCarb Recent Developments/Updates
- 9.2.6 AvCarb Competitive Strengths & Weaknesses
- 9.3 CGT Carbon
 - 9.3.1 CGT Carbon Details
 - 9.3.2 CGT Carbon Major Business
 - 9.3.3 CGT Carbon Carbon Electrode Materials for Flow Battery Product and Services
 - 9.3.4 CGT Carbon Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 CGT Carbon Recent Developments/Updates
 - 9.3.6 CGT Carbon Competitive Strengths & Weaknesses
- 9.4 JNTG
 - 9.4.1 JNTG Details
 - 9.4.2 JNTG Major Business
 - 9.4.3 JNTG Carbon Electrode Materials for Flow Battery Product and Services
 - 9.4.4 JNTG Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 JNTG Recent Developments/Updates
 - 9.4.6 JNTG Competitive Strengths & Weaknesses
- 9.5 BWF Tec
 - 9.5.1 BWF Tec Details
 - 9.5.2 BWF Tec Major Business
 - 9.5.3 BWF Tec Carbon Electrode Materials for Flow Battery Product and Services
 - 9.5.4 BWF Tec Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 BWF Tec Recent Developments/Updates
 - 9.5.6 BWF Tec Competitive Strengths & Weaknesses
- 9.6 CeTech
 - 9.6.1 CeTech Details
 - 9.6.2 CeTech Major Business
 - 9.6.3 CeTech Carbon Electrode Materials for Flow Battery Product and Services
 - 9.6.4 CeTech Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 CeTech Recent Developments/Updates
 - 9.6.6 CeTech Competitive Strengths & Weaknesses
- 9.7 Liaoning JinGu Carbon Materials

- 9.7.1 Liaoning JinGu Carbon Materials Details
- 9.7.2 Liaoning JinGu Carbon Materials Major Business
- 9.7.3 Liaoning JinGu Carbon Materials Carbon Electrode Materials for Flow Battery Product and Services
- 9.7.4 Liaoning JinGu Carbon Materials Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 Liaoning JinGu Carbon Materials Recent Developments/Updates
- 9.7.6 Liaoning JinGu Carbon Materials Competitive Strengths & Weaknesses
- 9.8 Sichuan Jiangyou Runsheng Graphite Felting
 - 9.8.1 Sichuan Jiangyou Runsheng Graphite Felting Details
 - 9.8.2 Sichuan Jiangyou Runsheng Graphite Felting Major Business
 - 9.8.3 Sichuan Jiangyou Runsheng Graphite Felting Carbon Electrode Materials for Flow Battery Product and Services
 - 9.8.4 Sichuan Jiangyou Runsheng Graphite Felting Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Sichuan Jiangyou Runsheng Graphite Felting Recent Developments/Updates
 - 9.8.6 Sichuan Jiangyou Runsheng Graphite Felting Competitive Strengths & Weaknesses
- 9.9 Jiangsu Mige New Material
 - 9.9.1 Jiangsu Mige New Material Details
 - 9.9.2 Jiangsu Mige New Material Major Business
 - 9.9.3 Jiangsu Mige New Material Carbon Electrode Materials for Flow Battery Product and Services
 - 9.9.4 Jiangsu Mige New Material Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Jiangsu Mige New Material Recent Developments/Updates
 - 9.9.6 Jiangsu Mige New Material Competitive Strengths & Weaknesses
- 9.10 Chemshine Carbon
 - 9.10.1 Chemshine Carbon Details
 - 9.10.2 Chemshine Carbon Major Business
 - 9.10.3 Chemshine Carbon Carbon Electrode Materials for Flow Battery Product and Services
 - 9.10.4 Chemshine Carbon Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Chemshine Carbon Recent Developments/Updates
 - 9.10.6 Chemshine Carbon Competitive Strengths & Weaknesses
- 9.11 Jiangsu Puxang EP Sci-Tech
 - 9.11.1 Jiangsu Puxang EP Sci-Tech Details
 - 9.11.2 Jiangsu Puxang EP Sci-Tech Major Business

9.11.3 Jiangsu Puxang EP Sci-Tech Carbon Electrode Materials for Flow Battery Product and Services

9.11.4 Jiangsu Puxang EP Sci-Tech Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Jiangsu Puxang EP Sci-Tech Recent Developments/Updates

9.11.6 Jiangsu Puxang EP Sci-Tech Competitive Strengths & Weaknesses

9.12 Shenyang Fulai Carbon Fiber

9.12.1 Shenyang Fulai Carbon Fiber Details

9.12.2 Shenyang Fulai Carbon Fiber Major Business

9.12.3 Shenyang Fulai Carbon Fiber Carbon Electrode Materials for Flow Battery Product and Services

9.12.4 Shenyang Fulai Carbon Fiber Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Shenyang Fulai Carbon Fiber Recent Developments/Updates

9.12.6 Shenyang Fulai Carbon Fiber Competitive Strengths & Weaknesses

9.13 Shanghai Qijie New Materials

9.13.1 Shanghai Qijie New Materials Details

9.13.2 Shanghai Qijie New Materials Major Business

9.13.3 Shanghai Qijie New Materials Carbon Electrode Materials for Flow Battery Product and Services

9.13.4 Shanghai Qijie New Materials Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Shanghai Qijie New Materials Recent Developments/Updates

9.13.6 Shanghai Qijie New Materials Competitive Strengths & Weaknesses

9.14 Dalian LONGTIAN Tech

9.14.1 Dalian LONGTIAN Tech Details

9.14.2 Dalian LONGTIAN Tech Major Business

9.14.3 Dalian LONGTIAN Tech Carbon Electrode Materials for Flow Battery Product and Services

9.14.4 Dalian LONGTIAN Tech Carbon Electrode Materials for Flow Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Dalian LONGTIAN Tech Recent Developments/Updates

9.14.6 Dalian LONGTIAN Tech Competitive Strengths & Weaknesses

9.15 Shanghai Carbon Industry

9.15.1 Shanghai Carbon Industry Details

9.15.2 Shanghai Carbon Industry Major Business

9.15.3 Shanghai Carbon Industry Carbon Electrode Materials for Flow Battery Product and Services

9.15.4 Shanghai Carbon Industry Carbon Electrode Materials for Flow Battery

Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Shanghai Carbon Industry Recent Developments/Updates

9.15.6 Shanghai Carbon Industry Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Carbon Electrode Materials for Flow Battery Industry Chain

10.2 Carbon Electrode Materials for Flow Battery Upstream Analysis

10.2.1 Carbon Electrode Materials for Flow Battery Core Raw Materials

10.2.2 Main Manufacturers of Carbon Electrode Materials for Flow Battery Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Carbon Electrode Materials for Flow Battery Production Mode

10.6 Carbon Electrode Materials for Flow Battery Procurement Model

10.7 Carbon Electrode Materials for Flow Battery Industry Sales Model and Sales Channels

10.7.1 Carbon Electrode Materials for Flow Battery Sales Model

10.7.2 Carbon Electrode Materials for Flow Battery Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Carbon Electrode Materials for Flow Battery Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Carbon Electrode Materials for Flow Battery Production Value by Region (2021-2026) & (USD Million)

Table 3. World Carbon Electrode Materials for Flow Battery Production Value by Region (2027-2032) & (USD Million)

Table 4. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Region (2021-2026)

Table 5. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Region (2027-2032)

Table 6. World Carbon Electrode Materials for Flow Battery Production by Region (2021-2026) & (K Sqm)

Table 7. World Carbon Electrode Materials for Flow Battery Production by Region (2027-2032) & (K Sqm)

Table 8. World Carbon Electrode Materials for Flow Battery Production Market Share by Region (2021-2026)

Table 9. World Carbon Electrode Materials for Flow Battery Production Market Share by Region (2027-2032)

Table 10. World Carbon Electrode Materials for Flow Battery Average Price by Region (2021-2026) & (US\$/Sqm)

Table 11. World Carbon Electrode Materials for Flow Battery Average Price by Region (2027-2032) & (US\$/Sqm)

Table 12. Carbon Electrode Materials for Flow Battery Major Market Trends

Table 13. World Carbon Electrode Materials for Flow Battery Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Sqm)

Table 14. World Carbon Electrode Materials for Flow Battery Consumption by Region (2021-2026) & (K Sqm)

Table 15. World Carbon Electrode Materials for Flow Battery Consumption Forecast by Region (2027-2032) & (K Sqm)

Table 16. World Carbon Electrode Materials for Flow Battery Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Carbon Electrode Materials for Flow Battery Producers in 2025

Table 18. World Carbon Electrode Materials for Flow Battery Production by Manufacturer (2021-2026) & (K Sqm)

Table 19. Production Market Share of Key Carbon Electrode Materials for Flow Battery Producers in 2025

Table 20. World Carbon Electrode Materials for Flow Battery Average Price by Manufacturer (2021-2026) & (US\$/Sqm)

Table 21. Global Carbon Electrode Materials for Flow Battery Company Evaluation Quadrant

Table 22. World Carbon Electrode Materials for Flow Battery Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Carbon Electrode Materials for Flow Battery Production Site of Key Manufacturer

Table 24. Carbon Electrode Materials for Flow Battery Market: Company Product Type Footprint

Table 25. Carbon Electrode Materials for Flow Battery Market: Company Product Application Footprint

Table 26. Carbon Electrode Materials for Flow Battery Competitive Factors

Table 27. Carbon Electrode Materials for Flow Battery New Entrant and Capacity Expansion Plans

Table 28. Carbon Electrode Materials for Flow Battery Mergers & Acquisitions Activity

Table 29. United States VS China Carbon Electrode Materials for Flow Battery Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Carbon Electrode Materials for Flow Battery Production Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 31. United States VS China Carbon Electrode Materials for Flow Battery Consumption Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 32. United States Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production (2021-2026) & (K Sqm)

Table 36. United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share (2021-2026)

Table 37. China Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Carbon Electrode Materials for Flow Battery

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Carbon Electrode Materials for Flow Battery Production, (2021-2026) & (K Sqm)

Table 41. China Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share (2021-2026)

Table 42. Rest of World Based Carbon Electrode Materials for Flow Battery Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery Production, (2021-2026) & (K Sqm)

Table 46. Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share (2021-2026)

Table 47. World Carbon Electrode Materials for Flow Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Carbon Electrode Materials for Flow Battery Production by Type (2021-2026) & (K Sqm)

Table 49. World Carbon Electrode Materials for Flow Battery Production by Type (2027-2032) & (K Sqm)

Table 50. World Carbon Electrode Materials for Flow Battery Production Value by Type (2021-2026) & (USD Million)

Table 51. World Carbon Electrode Materials for Flow Battery Production Value by Type (2027-2032) & (USD Million)

Table 52. World Carbon Electrode Materials for Flow Battery Average Price by Type (2021-2026) & (US\$/Sqm)

Table 53. World Carbon Electrode Materials for Flow Battery Average Price by Type (2027-2032) & (US\$/Sqm)

Table 54. World Carbon Electrode Materials for Flow Battery Production Value by Base Material, (USD Million), 2021 & 2025 & 2032

Table 55. World Carbon Electrode Materials for Flow Battery Production by Base Material (2021-2026) & (K Sqm)

Table 56. World Carbon Electrode Materials for Flow Battery Production by Base Material (2027-2032) & (K Sqm)

Table 57. World Carbon Electrode Materials for Flow Battery Production Value by Base Material (2021-2026) & (USD Million)

Table 58. World Carbon Electrode Materials for Flow Battery Production Value by Base Material (2027-2032) & (USD Million)

Table 59. World Carbon Electrode Materials for Flow Battery Average Price by Base Material (2021-2026) & (US\$/Sqm)

Table 60. World Carbon Electrode Materials for Flow Battery Average Price by Base Material (2027-2032) & (US\$/Sqm)

Table 61. World Carbon Electrode Materials for Flow Battery Production Value by Thickness, (USD Million), 2021 & 2025 & 2032

Table 62. World Carbon Electrode Materials for Flow Battery Production by Thickness (2021-2026) & (K Sqm)

Table 63. World Carbon Electrode Materials for Flow Battery Production by Thickness (2027-2032) & (K Sqm)

Table 64. World Carbon Electrode Materials for Flow Battery Production Value by Thickness (2021-2026) & (USD Million)

Table 65. World Carbon Electrode Materials for Flow Battery Production Value by Thickness (2027-2032) & (USD Million)

Table 66. World Carbon Electrode Materials for Flow Battery Average Price by Thickness (2021-2026) & (US\$/Sqm)

Table 67. World Carbon Electrode Materials for Flow Battery Average Price by Thickness (2027-2032) & (US\$/Sqm)

Table 68. World Carbon Electrode Materials for Flow Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Carbon Electrode Materials for Flow Battery Production by Application (2021-2026) & (K Sqm)

Table 70. World Carbon Electrode Materials for Flow Battery Production by Application (2027-2032) & (K Sqm)

Table 71. World Carbon Electrode Materials for Flow Battery Production Value by Application (2021-2026) & (USD Million)

Table 72. World Carbon Electrode Materials for Flow Battery Production Value by Application (2027-2032) & (USD Million)

Table 73. World Carbon Electrode Materials for Flow Battery Average Price by Application (2021-2026) & (US\$/Sqm)

Table 74. World Carbon Electrode Materials for Flow Battery Average Price by Application (2027-2032) & (US\$/Sqm)

Table 75. SGL Carbon Basic Information, Manufacturing Base and Competitors

Table 76. SGL Carbon Major Business

Table 77. SGL Carbon Carbon Electrode Materials for Flow Battery Product and Services

Table 78. SGL Carbon Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. SGL Carbon Recent Developments/Updates
Table 80. SGL Carbon Competitive Strengths & Weaknesses
Table 81. AvCarb Basic Information, Manufacturing Base and Competitors
Table 82. AvCarb Major Business
Table 83. AvCarb Carbon Electrode Materials for Flow Battery Product and Services
Table 84. AvCarb Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. AvCarb Recent Developments/Updates
Table 86. AvCarb Competitive Strengths & Weaknesses
Table 87. CGT Carbon Basic Information, Manufacturing Base and Competitors
Table 88. CGT Carbon Major Business
Table 89. CGT Carbon Carbon Electrode Materials for Flow Battery Product and Services
Table 90. CGT Carbon Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. CGT Carbon Recent Developments/Updates
Table 92. CGT Carbon Competitive Strengths & Weaknesses
Table 93. JNTG Basic Information, Manufacturing Base and Competitors
Table 94. JNTG Major Business
Table 95. JNTG Carbon Electrode Materials for Flow Battery Product and Services
Table 96. JNTG Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. JNTG Recent Developments/Updates
Table 98. JNTG Competitive Strengths & Weaknesses
Table 99. BWF Tec Basic Information, Manufacturing Base and Competitors
Table 100. BWF Tec Major Business
Table 101. BWF Tec Carbon Electrode Materials for Flow Battery Product and Services
Table 102. BWF Tec Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. BWF Tec Recent Developments/Updates
Table 104. BWF Tec Competitive Strengths & Weaknesses
Table 105. CeTech Basic Information, Manufacturing Base and Competitors
Table 106. CeTech Major Business
Table 107. CeTech Carbon Electrode Materials for Flow Battery Product and Services
Table 108. CeTech Carbon Electrode Materials for Flow Battery Production (K Sqm),

Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. CeTech Recent Developments/Updates

Table 110. CeTech Competitive Strengths & Weaknesses

Table 111. Liaoning JinGu Carbon Materials Basic Information, Manufacturing Base and Competitors

Table 112. Liaoning JinGu Carbon Materials Major Business

Table 113. Liaoning JinGu Carbon Materials Carbon Electrode Materials for Flow Battery Product and Services

Table 114. Liaoning JinGu Carbon Materials Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Liaoning JinGu Carbon Materials Recent Developments/Updates

Table 116. Liaoning JinGu Carbon Materials Competitive Strengths & Weaknesses

Table 117. Sichuan Jiangyou Runsheng Graphite Felting Basic Information, Manufacturing Base and Competitors

Table 118. Sichuan Jiangyou Runsheng Graphite Felting Major Business

Table 119. Sichuan Jiangyou Runsheng Graphite Felting Carbon Electrode Materials for Flow Battery Product and Services

Table 120. Sichuan Jiangyou Runsheng Graphite Felting Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Sichuan Jiangyou Runsheng Graphite Felting Recent Developments/Updates

Table 122. Sichuan Jiangyou Runsheng Graphite Felting Competitive Strengths & Weaknesses

Table 123. Jiangsu Mige New Material Basic Information, Manufacturing Base and Competitors

Table 124. Jiangsu Mige New Material Major Business

Table 125. Jiangsu Mige New Material Carbon Electrode Materials for Flow Battery Product and Services

Table 126. Jiangsu Mige New Material Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Jiangsu Mige New Material Recent Developments/Updates

Table 128. Jiangsu Mige New Material Competitive Strengths & Weaknesses

Table 129. Chemshine Carbon Basic Information, Manufacturing Base and Competitors

Table 130. Chemshine Carbon Major Business

Table 131. Chemshine Carbon Carbon Electrode Materials for Flow Battery Product and

Services

Table 132. Chemshine Carbon Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Chemshine Carbon Recent Developments/Updates

Table 134. Chemshine Carbon Competitive Strengths & Weaknesses

Table 135. Jiangsu Puxang EP Sci-Tech Basic Information, Manufacturing Base and Competitors

Table 136. Jiangsu Puxang EP Sci-Tech Major Business

Table 137. Jiangsu Puxang EP Sci-Tech Carbon Electrode Materials for Flow Battery Product and Services

Table 138. Jiangsu Puxang EP Sci-Tech Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Jiangsu Puxang EP Sci-Tech Recent Developments/Updates

Table 140. Jiangsu Puxang EP Sci-Tech Competitive Strengths & Weaknesses

Table 141. Shenyang Fulai Carbon Fiber Basic Information, Manufacturing Base and Competitors

Table 142. Shenyang Fulai Carbon Fiber Major Business

Table 143. Shenyang Fulai Carbon Fiber Carbon Electrode Materials for Flow Battery Product and Services

Table 144. Shenyang Fulai Carbon Fiber Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Shenyang Fulai Carbon Fiber Recent Developments/Updates

Table 146. Shenyang Fulai Carbon Fiber Competitive Strengths & Weaknesses

Table 147. Shanghai Qijie New Materials Basic Information, Manufacturing Base and Competitors

Table 148. Shanghai Qijie New Materials Major Business

Table 149. Shanghai Qijie New Materials Carbon Electrode Materials for Flow Battery Product and Services

Table 150. Shanghai Qijie New Materials Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Shanghai Qijie New Materials Recent Developments/Updates

Table 152. Shanghai Qijie New Materials Competitive Strengths & Weaknesses

Table 153. Dalian LONGTIAN Tech Basic Information, Manufacturing Base and Competitors

Table 154. Dalian LONGTIAN Tech Major Business

Table 155. Dalian LONGTIAN Tech Carbon Electrode Materials for Flow Battery Product and Services

Table 156. Dalian LONGTIAN Tech Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Dalian LONGTIAN Tech Recent Developments/Updates

Table 158. Dalian LONGTIAN Tech Competitive Strengths & Weaknesses

Table 159. Shanghai Carbon Industry Basic Information, Manufacturing Base and Competitors

Table 160. Shanghai Carbon Industry Major Business

Table 161. Shanghai Carbon Industry Carbon Electrode Materials for Flow Battery Product and Services

Table 162. Shanghai Carbon Industry Carbon Electrode Materials for Flow Battery Production (K Sqm), Price (US\$/Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Shanghai Carbon Industry Recent Developments/Updates

Table 164. Shanghai Carbon Industry Competitive Strengths & Weaknesses

Table 165. Global Key Players of Carbon Electrode Materials for Flow Battery Upstream (Raw Materials)

Table 166. Global Carbon Electrode Materials for Flow Battery Typical Customers

Table 167. Carbon Electrode Materials for Flow Battery Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Carbon Electrode Materials for Flow Battery Picture

Figure 2. World Carbon Electrode Materials for Flow Battery Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Carbon Electrode Materials for Flow Battery Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Carbon Electrode Materials for Flow Battery Production (2021-2032) & (K Sqm)

Figure 5. World Carbon Electrode Materials for Flow Battery Average Price (2021-2032) & (US\$/Sqm)

Figure 6. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Region (2021-2032)

Figure 7. World Carbon Electrode Materials for Flow Battery Production Market Share by Region (2021-2032)

Figure 8. North America Carbon Electrode Materials for Flow Battery Production (2021-2032) & (K Sqm)

Figure 9. Europe Carbon Electrode Materials for Flow Battery Production (2021-2032) & (K Sqm)

Figure 10. China Carbon Electrode Materials for Flow Battery Production (2021-2032) & (K Sqm)

Figure 11. South Korea Carbon Electrode Materials for Flow Battery Production (2021-2032) & (K Sqm)

Figure 12. Carbon Electrode Materials for Flow Battery Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 15. World Carbon Electrode Materials for Flow Battery Consumption Market Share by Region (2021-2032)

Figure 16. United States Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 17. China Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 18. Europe Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 19. Japan Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 20. South Korea Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 21. ASEAN Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 22. India Carbon Electrode Materials for Flow Battery Consumption (2021-2032) & (K Sqm)

Figure 23. Producer Shipments of Carbon Electrode Materials for Flow Battery by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Carbon Electrode Materials for Flow Battery Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Carbon Electrode Materials for Flow Battery Markets in 2025

Figure 26. United States VS China: Carbon Electrode Materials for Flow Battery Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Carbon Electrode Materials for Flow Battery Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Carbon Electrode Materials for Flow Battery Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share 2025

Figure 30. China Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Carbon Electrode Materials for Flow Battery Production Market Share 2025

Figure 32. World Carbon Electrode Materials for Flow Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Type in 2025

Figure 34. Graphite Felt

Figure 35. Carbon Felt

Figure 36. World Carbon Electrode Materials for Flow Battery Production Market Share by Type (2021-2032)

Figure 37. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Type (2021-2032)

Figure 38. World Carbon Electrode Materials for Flow Battery Average Price by Type (2021-2032) & (US\$/Sqm)

Figure 39. World Carbon Electrode Materials for Flow Battery Production Value by Base Material, (USD Million), 2021 & 2025 & 2032

Figure 40. World Carbon Electrode Materials for Flow Battery Production Value Market

Share by Base Material in 2025

Figure 41. PAN-based

Figure 42. Rayon-based

Figure 43. Others

Figure 44. World Carbon Electrode Materials for Flow Battery Production Market Share by Base Material (2021-2032)

Figure 45. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Base Material (2021-2032)

Figure 46. World Carbon Electrode Materials for Flow Battery Average Price by Base Material (2021-2032) & (US\$/Sqm)

Figure 47. World Carbon Electrode Materials for Flow Battery Production Value by Thickness, (USD Million), 2021 & 2025 & 2032

Figure 48. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Thickness in 2025

Figure 49. Thickness 6mm

Figure 52. World Carbon Electrode Materials for Flow Battery Production Market Share by Thickness (2021-2032)

Figure 53. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Thickness (2021-2032)

Figure 54. World Carbon Electrode Materials for Flow Battery Average Price by Thickness (2021-2032) & (US\$/Sqm)

Figure 55. World Carbon Electrode Materials for Flow Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Application in 2025

Figure 57. Vanadium Redox Flow Battery

Figure 58. Zinc-Bromine Flow Battery

Figure 59. Iron-Chromium Flow Battery

Figure 60. Others

Figure 61. World Carbon Electrode Materials for Flow Battery Production Market Share by Application (2021-2032)

Figure 62. World Carbon Electrode Materials for Flow Battery Production Value Market Share by Application (2021-2032)

Figure 63. World Carbon Electrode Materials for Flow Battery Average Price by Application (2021-2032) & (US\$/Sqm)

Figure 64. Carbon Electrode Materials for Flow Battery Industry Chain

Figure 65. Carbon Electrode Materials for Flow Battery Procurement Model

Figure 66. Carbon Electrode Materials for Flow Battery Sales Model

Figure 67. Carbon Electrode Materials for Flow Battery Sales Channels, Direct Sales,

and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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