

# Global Coal-tar-based Hard Carbon Anode Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Coal-tar-based Hard Carbon Anode market size is expected to reach \$ 2174 million by 2032, rising at a market growth of 26.4% CAGR during the forecast period (2026-2032).

Coal-tar-based Hard Carbon Anode is an advanced anode material derived from coal tar pitch through controlled carbonization and microstructure engineering, forming a highly disordered carbon framework with abundant micropores that enables efficient lithium and sodium storage while maintaining strong structural integrity and long cycle stability. It is widely used in high-performance lithium-ion and sodium-ion battery systems requiring high capacity and durability. Its advantages include high specific capacity, robust structural stability, and extended service life. In 2025, production totaled 14,187 tons and the average price was USD 28,900 per ton. The industry's capacity utilization rate reached 78% and the average gross margin was approximately 35%. Upstream mainly consists of coal tar pitch and related carbon precursors, with representative suppliers including Olam Group, Cargill, Baowu Carbon Materials, and Sinopec ensuring stable raw material supply. The midstream focuses on carbonization process control, pore structure tuning, particle size distribution optimization, and impurity removal, which together determine electrochemical performance consistency and cycling durability. Downstream applications are primarily in lithium-ion batteries and sodium-ion batteries, with key customers including Panasonic, Samsung SDI, CATL, BYD, and Farasis Energy.

Coal-tar-based Hard Carbon Anodes are rapidly emerging as a cost-effective alternative in the sodium-ion battery sector. Leveraging the abundant and low-cost coal tar byproduct, this route offers a pragmatic solution to the raw material constraints of traditional biomass-based hard carbon. While historically challenged by lower

carbonization yields, recent breakthroughs in molecular cross-linking and precursor modification have significantly improved its electrochemical performance and production efficiency. As the demand for large-scale energy storage and low-speed electric vehicles grows, coal-tar-based hard carbon is transitioning from a supplementary option to a strategic pillar for sustainable and economically viable sodium-ion battery supply chains.

This report studies the global Coal-tar-based Hard Carbon Anode production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Coal-tar-based Hard Carbon Anode 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 Coal-tar-based Hard Carbon Anode that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Coal-tar-based Hard Carbon Anode total production and demand, 2021-2032, (Tons)

Global Coal-tar-based Hard Carbon Anode total production value, 2021-2032, (USD Million)

Global Coal-tar-based Hard Carbon Anode production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Coal-tar-based Hard Carbon Anode consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Coal-tar-based Hard Carbon Anode domestic production, consumption, key domestic manufacturers and share

Global Coal-tar-based Hard Carbon Anode production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Coal-tar-based Hard Carbon Anode production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Coal-tar-based Hard Carbon Anode production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Coal-tar-based Hard Carbon Anode 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 Kuraray (Japan), JFE Chemical (Japan), Kureha (Japan), Sumitomo (Japan), Stora Enso (Finland), Shanshan (China),

BTR (China), Putailai (China), Best Graphite (China), HiNa Battery Technology (China), 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 Coal-tar-based Hard Carbon Anode market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 Coal-tar-based Hard Carbon Anode Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Coal-tar-based Hard Carbon Anode Market, Segmentation by Type:

1-5?m

5-10?m

Others

Global Coal-tar-based Hard Carbon Anode Market, Segmentation by Specific Capacity:

Specific Capacity

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