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Global Carbon Felt for Flow Batteries Market Growth 2026-2032

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Abstracts

The global Carbon Felt for Flow Batteries market size is predicted to grow from US$ 31.50 million in 2025 to US$ 94.04 million in 2032; it is expected to grow at a CAGR of 16.5% from 2026 to 2032.

Carbon Felt for Flow Batteries refers to porous fibrous carbon electrode materials manufactured from carbonizable fibers, primarily PAN-based or rayon-based precursors, through needle punching, carbonization, graphitization and, where required, thermal activation, oxidation or other surface treatments. The material functions as a permeable electrode inside flow battery stacks, providing electronically conductive pathways, electrochemically active reaction interfaces and continuous electrolyte transport channels. Commercial products mainly comprise carbon felt and graphite felt, supplied in rolls or cut-to-size formats, with typical thicknesses spanning roughly 2.5–6.5 mm depending on stack design and compression requirements. Key performance parameters include electrical resistance, porosity, wettability, chemical stability, purity, elasticity and dimensional consistency. Activated and surface-modified products are increasingly used to improve electrolyte wettability and reaction kinetics. The market is primarily associated with vanadium redox flow batteries, while zinc-bromine, iron-chromium and other flow battery chemistries represent additional application areas. The scope of this study focuses on carbon and graphite felt products specifically manufactured or commercially supplied for use as porous electrodes in flow battery systems.

Key Findings

In 2025, the global manufacturer-level average selling price of carbon felt for flow batteries was approximately US$15/m?.

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Graphite felt remains the primary high-performance product type.

Vanadium redox flow batteries are the largest downstream application.

China is the most concentrated region for incremental demand and new manufacturing capacity, with approximately 560 MW of newly added vanadium flow battery storage capacity in 2024.

Products are evolving toward lower resistance, higher activity, better wettability, and greater consistency.

Market Trends

The market is shifting from general-purpose carbon and graphite felt toward application-specific electrode materials designed around flow-field architecture, compression ratio, electrolyte chemistry and stack current density. Manufacturers are increasingly integrating graphitization, thermal activation, oxidation and proprietary surface-treatment processes into commercial products rather than supplying untreated felt alone. This transition increases the importance of through-plane resistance, wettability, lot-to-lot consistency and electrochemical certification in supplier qualification.

Another structural trend is the gradual reduction in electrode area required per unit of stack power. Higher current density, improved flow-field design and better electrode surface activity are allowing newer stacks to generate more power from a similar electrode area. This improves system-level economics but means electrode-felt revenue growth is likely to remain below the growth rate of installed flow-battery capacity over the long term.

Market Dynamics

Drivers

The primary demand driver is the commercialization of long-duration energy storage. Flow batteries are increasingly considered for renewable-energy integration, grid stabilization and applications requiring long cycle life and multi-hour storage. China is particularly important: national data show that flow batteries increased their share of China's installed new-energy-storage technology mix from 0.4% in 2023 to approximately 1.0% in 2024, while large-scale projects are becoming more common.

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A second driver is increasing stack power density. Higher-performance electrodes can reduce internal resistance and polarization losses, making felt characteristics more important to stack efficiency. This is supporting demand for graphitized, thermally activated and surface-modified electrode materials rather than purely commodity carbon felt.

Restraints

The market remains constrained by the relatively limited installed base of flow batteries compared with lithium-ion energy storage. Carbon felt demand is therefore highly dependent on the timing of large utility-scale projects, resulting in uneven procurement patterns and relatively high year-to-year volatility for individual suppliers.

Cost reduction across flow battery systems also creates continued pricing pressure. The National Energy Administration indicated that China's vanadium flow battery system bid prices in 2024 were approximately 20% lower than those for comparable-scale projects in 2023. As system developers pursue further cost reductions, electrode suppliers face pressure to improve productivity and material utilization while maintaining electrochemical performance.

Opportunities

The most attractive opportunity lies in high-performance electrode felt for next-generation stacks. Products combining low electrical resistance, high porosity, optimized compression behavior and enhanced surface activity can command higher value than general-purpose felt because improvements at electrode level directly affect stack resistance, reaction kinetics and power density.

Localization of supply chains also creates opportunities. China is adding specialized carbon-felt capacity alongside rapid expansion of domestic vanadium flow battery manufacturing, while European, North American and Korean suppliers continue to compete through material consistency, proprietary activation processes and electrochemical performance. Increasingly stringent customer qualification is likely to favor suppliers capable of controlling precursor selection, needle punching, carbonization, graphitization and surface treatment within an integrated manufacturing system.

Challenges

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Technical consistency remains a major challenge. Small variations in thickness, areal weight, compression response, porosity or surface chemistry can affect electrolyte distribution and electrochemical performance across large battery stacks. Scaling laboratory-level surface modification into continuous, repeatable and cost-efficient production is therefore more difficult than demonstrating improved performance in small electrochemical cells.

The industry also faces substitution risk from alternative porous electrodes, including woven carbon fabrics and other engineered carbon structures. These alternatives do not currently displace felt across the entire flow-battery market, but continued improvements in stack architecture could change the preferred electrode format in selected applications.

Industry Chain Analysis

The upstream industry primarily includes PAN-based or rayon-based fibers, oxidized fibers, energy-intensive carbonization and graphitization equipment, process gases and surface-treatment chemicals. Midstream manufacturers convert precursor fibers into nonwoven felt through needle punching and then perform carbonization, graphitization, activation, oxidation, cutting and quality inspection. Downstream customers include flow battery stack manufacturers, battery system providers and large-scale energy storage projects. Unlike electrolyte demand, electrode-felt consumption is more closely linked to stack power capacity than storage duration because increasing MWh primarily requires additional electrolyte and tank capacity, whereas increasing MW requires additional electrode area and stack capacity.

Value Chain Analysis

Value creation is concentrated in precursor control, uniform nonwoven formation, high-temperature processing and electrode surface engineering. Basic carbonization creates conductive felt, while graphitization, activation and precise dimensional control increase product value by reducing resistance and improving electrolyte wettability and electrochemical reaction efficiency. Integrated manufacturers with internal control over several processing steps are better positioned to deliver consistent properties across large production lots. Commercial products already demonstrate industrial roll formats up to approximately 1,350 mm in width as well as customized dimensions for large-scale battery systems.

Segment Insights

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By Product Type, the market is divided into Carbon Felt, Graphite Felt and Others. Graphite Felt occupies the higher-performance segment due to its conductivity and electrochemical stability, while Carbon Felt remains relevant where cost, surface treatment and specific stack designs support its use.

By Fiber Precursor, PAN-based Felt represents the mainstream commercial route, while Rayon-based Felt remains an established alternative with different pore structure and fiber characteristics. By Surface Treatment, the market includes Untreated Felt, Thermally or Oxidatively Activated Felt, Surface-modified Felt and Others. Demand is progressively shifting toward activated and engineered surfaces as stack developers pursue higher current density and lower polarization. Commercial products already span untreated, thermally activated and proprietary activated configurations.

Downstream Market Opportunities

Vanadium Redox Flow Batteries provide the clearest near-term opportunity because commercial projects are moving toward larger power ratings and longer operating lives. The technology is particularly suited to stationary energy storage where cycle durability, safety and independent scaling of power and energy are valued. China remains the strongest source of near-term project demand, supported by rapid expansion of utility-scale new energy storage and an increasing number of large-format demonstration and commercial projects.

Iron-chromium, zinc-bromine and other flow battery chemistries represent smaller but strategically relevant opportunities. Their contribution to felt demand will depend on commercialization progress, stack architecture and whether porous carbon felt remains the preferred electrode format as these technologies scale.

Regional Insights

Asia-Pacific, led by China, currently represents the most dynamic demand and capacity-expansion region. China's rapid growth in vanadium flow battery projects is encouraging domestic production of electrode felt and other stack materials, while a growing supplier base is increasing price competition and accelerating localization. China's broader new-energy-storage market is also becoming more concentrated in large projects: installations of 100 MW and above accounted for 62.3% of installed new-energy-storage capacity by the end of 2024, creating a favorable environment for large-scale flow battery deployment.

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Europe and North America remain important technology and high-value material markets, characterized by long-standing carbon-material expertise, proprietary processing and greater emphasis on certified electrochemical performance. South Korea has a smaller manufacturing base but maintains specialized electrode-felt capabilities. Japan retains deep carbon-fiber and graphite-material expertise, although currently verified dedicated flow-battery felt supply is more limited than the broader carbon-material manufacturing base.

Competitive Landscape Analysis

The competitive landscape is becoming increasingly regionalized. Europe and North America retain advantages in established carbon-material processing, proprietary activation and high-consistency engineered products, while China is developing the broadest and fastest-expanding manufacturing base and increasingly supplies purpose-designed felt for large domestic flow battery projects. South Korea participates through a smaller number of specialized electrode manufacturers with integrated graphitization and surface-treatment capabilities.

Competition is moving away from simple availability of carbon felt toward measurable electrochemical performance, manufacturing consistency and the ability to support large-volume stack production. Supplier qualification increasingly depends on conductivity, thickness uniformity, compression behavior, wettability, purity, durability and stable performance across production lots. As project sizes increase, suppliers capable of continuous production, roll-format delivery, customized dimensions and integrated surface treatment are likely to strengthen their competitive position.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Carbon Felt for Flow Batteries Industry Forecast” looks at past sales and reviews total world Carbon Felt for Flow Batteries sales in 2025, providing a comprehensive analysis by region and market sector of projected Carbon Felt for Flow Batteries sales for 2026 through 2032. With Carbon Felt for Flow Batteries sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Carbon Felt for Flow Batteries industry.

This Insight Report provides a comprehensive analysis of the global Carbon Felt for Flow Batteries landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity.

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This report also analyzes the strategies of leading global companies with a focus on Carbon Felt for Flow Batteries portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Carbon Felt for Flow Batteries market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Carbon Felt for Flow Batteries and breaks down the forecast by Fiber Precursor, 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 Carbon Felt for Flow Batteries.

This report presents a comprehensive overview, market shares, and growth opportunities of Carbon Felt for Flow Batteries market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Fiber Precursor:

PAN-based Felt

Rayon-based Felt

Others

Segmentation by Thickness:

?3 mm

>3–5 mm

>5 mm

Segmentation by Surface Treatment:

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Untreated Felt

Thermally or Oxidatively Activated Felt

Surface-modified Felt

Others

Segmentation by Application:

Vanadium Redox Flow Batteries

Zinc Bromine Flow Batteries

Iron Chromium Flow Batteries

Other Flow Batteries

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- 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.

- SGL Carbon SE

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Mersen

AvCarb Material Solutions

CGT Carbon GmbH

JNTG Co., Ltd.

BWF Group

Liaoning Jingu Carbon Materials Co., Ltd.

Sichuan Jiangyou Runsheng Graphite Felt Co., Ltd.

Sichuan Junrui Carbon Fiber Materials Co., Ltd.

KBC Corporation, Ltd.

Jiangsu Mige New Material Co., Ltd.

Shanghai TANJI Industrial Group Co., Ltd.

Hangzhou Vulcan New Material Technology Co., Ltd.

Shenyang Fulai Carbon Fiber Co., Ltd.

Jiaxing Nake New Materials Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Carbon Felt for Flow Batteries market?

What factors are driving Carbon Felt for Flow Batteries market growth, globally and by region?

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

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How do Carbon Felt for Flow Batteries market opportunities vary by end market size?

How does Carbon Felt for Flow Batteries break out by Fiber Precursor, by Application?

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