



The Global Market for Graphene in Batteries and Supercapacitors

TABLE OF CONTENTS

1 RESEARCH METHODOLOGY.....	20
1.1 Market opportunity analysis.....	20
1.2 Market challenges rating system.....	22
2 EXECUTIVE SUMMARY.....	24
2.1 Two-dimensional (2D) materials.....	24
2.2 Graphene.....	24
2.2.1 The market in 2016.....	25
2.2.2 The market in 2017.....	25
2.2.3 The market in 2018.....	25
2.2.4 Production.....	26
2.2.5 Products.....	27
2.2.6 Graphene investments 2017-2018.....	29
2.3 Market outlook for 2018.....	31
2.3.1 Global funding and initiatives.....	36
2.3.2 Products and applications.....	37
2.3.3 Production.....	38
2.3.4 Market drivers and trends.....	39
2.3.5 Market and technical challenges.....	46
2.4 REGIONAL DEMAND.....	48
2.4.1 Asia-Pacific.....	48
2.4.1.1 Australia.....	53
2.4.2 North America.....	54
2.4.3 Europe.....	56
3 PROPERTIES OF NANOMATERIALS.....	58
3.1 Categorization.....	58
4 OVERVIEW OF GRAPHENE.....	60
4.1 History.....	60
4.2 Forms of graphene.....	61



The Global Market for Graphene in Batteries and Supercapacitors

4.3	Properties.....	62
4.4	3D Graphene.....	63
4.5	Graphene Quantum Dots.....	63
5	CARBON NANOTUBES VERSUS GRAPHENE.....	68
5.1	Comparative properties.....	68
5.2	Cost and production.....	69
5.3	Carbon nanotube-graphene hybrids.....	70
5.4	Competitive analysis of carbon nanotubes and graphene.....	70
6	OTHER 2-D MATERIALS.....	72
6.1	Beyond moore's law.....	73
6.2	Batteries.....	74
6.3	PHOSPHORENE.....	74
6.3.1	Properties.....	74
6.3.1.1	Fabrication methods.....	76
6.3.1.2	Challenges for the use of phosphorene in devices.....	76
6.3.2	Applications.....	76
6.4	GRAPHITIC CARBON NITRIDE (g-C ₃ N ₄).....	79
6.4.1	Properties.....	79
6.4.2	Synthesis.....	80
6.4.3	C ₂ N.....	80
6.4.4	Applications.....	81
6.5	GERMANENE.....	82
6.5.1	Properties.....	82
6.5.2	Applications.....	83
6.5.3	Market opportunity assessment.....	83
6.6	GRAPHDIYNE.....	84
6.6.1	Properties.....	84
6.6.2	Applications.....	84



The Global Market for Graphene in Batteries and Supercapacitors

6.7	GRAPHANE.....	86
6.7.1	Properties.....	87
6.7.2	Applications.....	87
6.8	HEXAGONAL BORON-NITRIDE.....	88
6.8.1	Properties.....	89
6.8.2	Applications.....	89
6.9	MOLYBDENUM DISULFIDE (MoS ₂).....	91
6.9.1	Properties.....	91
6.9.2	Applications.....	92
6.10	RHENIUM DISULFIDE (ReS ₂) AND DISELENIDE (ReSe ₂).....	94
6.10.1	Properties.....	95
6.10.2	Applications.....	95
6.11	SILICENE.....	96
6.11.1	Properties.....	96
6.11.2	Applications.....	97
6.12	STANENE/TINENE.....	98
6.12.1	Properties.....	99
6.12.2	Applications.....	99
6.13	TUNGSTEN DISELENIDE.....	100
6.13.1	Properties.....	101
6.13.2	Applications.....	101
6.14	ANTIMONENE.....	101
6.14.1	Properties.....	101
6.14.2	Applications.....	102
6.15	DIAMENE.....	102
6.15.1	Properties.....	102
6.15.2	Applications.....	102
6.16	INDIUM SELENIDE.....	102
6.16.1	Properties.....	102



The Global Market for Graphene in Batteries and Supercapacitors

6.16.2	Applications.....	103
6.17	COMPARATIVE ANALYSIS OF GRAPHENE AND OTHER 2D MATERIALS.....	103
7	GRAPHENE SYNTHESIS.....	105
8	GRAPHENE BATTERY AND SUPERCAPACITOR INDUSTRY DEVELOPMENTS 2013-2018-INVESTMENTS, PRODUCTS AND PRODUCTION.....	125
9	GRAPHENE MARKET ANALYSIS.....	132
9.1	Graphene production volumes 2010-2030.....	132
9.2	Commercial production capacities.....	133
9.2.1	Graphene oxide.....	134
9.2.2	Graphene nanoplatelets.....	135
9.2.3	CVD graphene film.....	137
9.2.4	Planned graphene capacities 2018 onwards.....	138
9.3	Graphene pricing.....	138
9.3.1	Pristine Graphene Flakes pricing.....	140
9.3.2	Few-Layer Graphene pricing.....	140
9.3.3	Graphene Nanoplatelets pricing.....	141
9.3.4	Reduced Graphene Oxide pricing.....	141
9.3.5	Graphene Quantum Dots pricing.....	142
9.3.6	Graphene Oxide Nanosheets pricing.....	143
9.3.7	Multilayer Graphene (MLG) pricing.....	143
9.3.8	Mass production of lower grade graphene materials.....	144
9.3.9	High grade graphene difficult to mass produce.....	144
9.3.10	Bulk supply.....	144
9.3.11	Commoditisation.....	145
10	GRAPHENE BATTERY AND SUPERCAPACITOR MARKET.....	146
10.1	BATTERIES.....	147



The Global Market for Graphene in Batteries and Supercapacitors

10.1.1	MARKET DRIVERS AND TRENDS.....	147
10.1.2	PROPERTIES AND APPLICATIONS.....	149
10.1.2.1	Lithium-ion batteries (LIB).....	149
10.1.2.2	Lithium-air batteries.....	150
10.1.2.3	Lithium-sulfur batteries (Li-S).....	150
10.1.2.4	Sodium-ion batteries.....	151
10.1.2.5	Flexible and stretchable batteries.....	151
10.1.3	GLOBAL MARKET SIZE AND OPPORTUNITY.....	154
10.1.4	MARKET CHALLENGES.....	158
10.1.5	PRODUCT DEVELOPERS.....	159
10.2	SUPERCAPACITORS.....	163
10.2.1	MARKET DRIVERS AND TRENDS.....	163
10.2.2	PROPERTIES AND APPLICATIONS.....	163
10.2.2.1	Flexible and stretchable supercapacitors.....	165
10.2.3	GLOBAL MARKET SIZE AND OPPORTUNITY.....	167
10.2.4	MARKET CHALLENGES.....	170
10.2.4.1	Low energy storage capacity of graphene.....	170
10.2.5	PRODUCT DEVELOPERS.....	170
11	GRAPHENE BATTERY AND SUPERCAPACITOR PRODUCT DEVELOPERS.....	172
12	REFERENCES.....	188

TABLES

Table 1: Demand for graphene (tons), 2010-2030.....	26
Table 2: Consumer products incorporating graphene.....	28
Table 3: Graphene investments and financial agreements 2017-2018.....	29
Table 4: Market opportunity assessment matrix for graphene applications.....	33
Table 5: Graphene target markets-Applications and potential addressable market size.....	37
Table 6: Main graphene producers by country and annual production capacities.....	38



The Global Market for Graphene in Batteries and Supercapacitors

Table 7: Graphene industrial collaborations, licence agreements and target markets.....	41
Table 8: Categorization of nanomaterials.....	59
Table 9: Properties of graphene.....	62
Table 10: Comparison of graphene QDs and semiconductor QDs.....	64
Table 11: Graphene quantum dot producers.....	67
Table 12: Comparative properties of carbon materials.....	69
Table 13: Comparative properties of graphene with nanoclays and carbon nanotubes.....	70
Table 14: Competitive analysis of Carbon nanotubes and graphene by application area and potential impact by 2030.	71
Table 15: 2D materials types.....	72
Table 16: Electronic and mechanical properties of monolayer phosphorene, graphene and MoS ₂	75
Table 17: Market opportunity assessment for phosphorene applications.....	79
Table 18: Market opportunity assessment for graphitic carbon nitride applications.....	81
Table 19: Market opportunity assessment for germanene applications.....	83
Table 20: Market opportunity assessment for graphdiyne applications.....	86
Table 21: Market opportunity assessment for graphane applications.....	88
Table 22: Market opportunity assessment for hexagonal boron nitride applications.....	90
Table 23: Market opportunity assessment for molybdenum disulfide applications.....	94
Table 24: Market opportunity assessment for Rhenium disulfide (ReS ₂) and diselenide (ReSe ₂) applications.....	95
Table 25: Market opportunity assessment for silicene applications.....	98
Table 26: Market opportunity assessment for stanine/tinene applications.....	100
Table 27: Market opportunity assessment for tungsten diselenide applications.....	101
Table 28: Comparative analysis of graphene and other 2-D nanomaterials.....	103
Table 29: Large area graphene films-Markets, applications and current global market.....	105
Table 30: Graphene oxide flakes/graphene nanoplatelets-Markets, applications and current global market.....	105
Table 31: Main production methods for graphene.....	106
Table 32: Large area graphene films-Markets, applications and current global market.....	112
Table 33: Graphene synthesis methods, by company.....	123
Table 34: Graphene battery and supercapacitor industry developments 2013-2018.....	125
Table 35: Demand for graphene (tons), 2010-2030.....	132



The Global Market for Graphene in Batteries and Supercapacitors

Table 36: Graphene oxide production capacity in tons by country/year, 2010-2018.....	134
Table 37: Graphene oxide production capacity in tons by region, 2010-2018.....	134
Table 38: Graphene nanoplatelets capacity in tons by country/year, 2010-2018.....	135
Table 39: Graphene nanoplatelets capacity in tons by region, 2010-2018.....	136
Table 40: CVD graphene film capacity in tons by country/year, 2010-2018/ 000s m ²	138
Table 41: Planned graphene production capacities.....	138
Table 42: Types of graphene and prices.....	139
Table 43: Pristine graphene flakes pricing by producer.....	140
Table 44: Few-layer graphene pricing by producer.....	141
Table 45: Graphene nanoplatelets pricing by producer.....	141
Table 46: Reduced graphene oxide pricing, by producer.....	142
Table 47: Graphene quantum dots pricing by producer.....	142
Table 48: Graphene oxide nanosheets pricing by producer.....	143
Table 49: Multi-layer graphene pricing by producer.....	143
Table 50: Market drivers for use of graphene in batteries.....	147
Table 51: Wearable energy and energy harvesting devices and stage of development.....	151
Table 52: Applications in flexible and stretchable batteries, by materials type and benefits thereof.....	153
Table 53: Market size for graphene in batteries.....	155
Table 54: Potential addressable market for thin film, flexible and printed batteries.....	156
Table 55: Market opportunity assessment for graphene in batteries.....	156
Table 56: Demand for graphene in batteries (tons), 2018-2030.....	157
Table 57: Market challenges for graphene in batteries.....	158
Table 58: Market challenges rating for graphene in the batteries market.....	159
Table 59: Market drivers for use of graphene in supercapacitors.....	163
Table 60: Comparative properties of graphene supercapacitors and lithium-ion batteries.....	164
Table 61: Applications and benefits of graphene in supercapacitors.....	164
Table 62: Applications in flexible and stretchable supercapacitors, by nanomaterials type and benefits thereof.....	166
Table 63: Market size for graphene in supercapacitors.....	167
Table 64: Market opportunity assessment for graphene in supercapacitors.....	168



The Global Market for Graphene in Batteries and Supercapacitors

Table 65: Demand for graphene in supercapacitors (tons), 2018-2030.....	169
Table 66: Market challenges rating for graphene in the supercapacitors market.....	170
Table 67: Graphene industrial collaborations, licence agreements and target markets.....	172

FIGURES

Figure 1: Demand for graphene, 2010-2030.....	27
Figure 2: Vittoria bike tires incorporating graphene.....	28
Figure 3: Demand for graphene, by market, 2018. Figures based on market graphene producers sell to, including samples.....	32
Figure 4: Global government funding for graphene in millions USD to 2018.....	37
Figure 5: Global consumption of graphene 2017, by region.....	45
Figure 6: Demand for graphene in China, by market, 2017.....	48
Figure 7: Demand for graphene in China, by market, 2030.....	49
Figure 8: Demand for graphene in Asia-Pacific, by market, 2017.....	50
Figure 9: Demand for graphene in Asia-Pacific, by market, 2030.....	51
Figure 10: 15-inch single-layer graphene sheet being prepared in the Chongqing Institute of Green and Intelligent Technology, Chinese Academy of Sciences.....	52
Figure 11: Demand for graphene in North America, by market, 2017.....	55
Figure 12: Demand for graphene in North America, by market, 2030.....	56
Figure 13: Demand for graphene in Europe, by market, 2017.....	57
Figure 14: Demand for graphene in Europe, by market, 2030.....	58
Figure 15: Graphene layer structure schematic.....	60
Figure 16: Graphite and graphene.....	61
Figure 17: Graphene and its descendants: top right: graphene; top left: graphite = stacked graphene; bottom right: nanotube=rolled graphene; bottom left: fullerene=wrapped graphene.	62
Figure 18: Schematic of (a) CQDs and (c) GQDs. HRTEM images of (b) C-dots and (d) GQDs showing combination of zigzag and armchair edges (positions marked as 1–4).....	64
Figure 19: Green-fluorescing graphene quantum dots.....	66
Figure 20: Graphene quantum dots.....	66
Figure 21: Graphene can be rolled up into a carbon nanotube, wrapped into a fullerene, and stacked into graphite... ..	68
Figure 22: Schematic of 2-D materials.....	73



The Global Market for Graphene in Batteries and Supercapacitors

Figure 23: Black phosphorus structure.....	74
Figure 24: Black Phosphorus crystal.....	75
Figure 25: Bottom gated flexible few-layer phosphorene transistors with the hydrophobic dielectric encapsulation.....	77
Figure 26: Graphitic carbon nitride.....	80
Figure 27: Structural difference between graphene and C ₂ N-h ₂ D crystal: (a) graphene; (b) C ₂ N-h ₂ D crystal. Credit: Ulsan National Institute of Science and Technology.....	80
Figure 28: Schematic of germanene.....	82
Figure 29: Graphdiyne structure.....	84
Figure 30: Schematic of Graphane crystal.....	87
Figure 31: Structure of hexagonal boron nitride.....	88
Figure 32: BN nanosheet textiles application.....	90
Figure 33: Structure of 2D molybdenum disulfide.....	91
Figure 34: SEM image of MoS ₂	92
Figure 35: Atomic force microscopy image of a representative MoS ₂ thin-film transistor.....	93
Figure 36: Schematic of the molybdenum disulfide (MoS ₂) thin-film sensor with the deposited molecules that create additional charge.....	93
Figure 37: Schematic of a monolayer of rhenium disulfide.....	95
Figure 38: Silicene structure.....	96
Figure 39: Monolayer silicene on a silver (111) substrate.....	96
Figure 40: Silicene transistor.....	97
Figure 41: Crystal structure for stanene.....	99
Figure 42: Atomic structure model for the 2D stanene on Bi ₂ Te ₃ (111).....	99
Figure 43: Schematic of tungsten diselenide.....	100
Figure 44: Schematic of Indium Selenide (InSe).....	103
Figure 45: Fabrication methods of graphene.....	107
Figure 46: Graphene synthesis methods.....	108
Figure 47: TEM micrographs of: A) HR-CNFs; B) GANF® HR-CNF, it can be observed its high graphitic structure; C) Unraveled ribbon from the HR-CNF; D) Detail of the ribbon; E) Scheme of the structure of the HR-CNFs; F) Large single graphene oxide sheets derived from GANF.....	109
Figure 48: Graphene nanoribbons grown on germanium.....	111
Figure 49: Schematic illustration of the main graphene production techniques.....	113



The Global Market for Graphene in Batteries and Supercapacitors

Figure 50: Graphene synthesis-CVD technique.....	114
Figure 51: (a) Graphene powder production line in The Sixth Element Materials Technology Co. Ltd. (b) Graphene film production line of Wuxi Graphene Films Co. Ltd.....	115
Figure 52: Illustrative procedure of the Scotch-tape based micromechanical cleavage of HOPG.....	118
Figure 53: Roll-to-roll graphene production process.....	119
Figure 54: Schematic of roll-to-roll manufacturing process.....	120
Figure 55: Microwave irradiation of graphite to produce single-layer graphene.....	122
Figure 56: Demand for graphene, 2010-2030.....	133
Figure 57: Graphene oxide production capacity in tons by region, 2010-2018.....	135
Figure 58: Graphene nanoplatelets capacity in tons by region, 2010-2018.....	137
Figure 59: CVD Graphene on Cu Foil.....	137
Figure 60: The SkelStart Engine Start Module 2.0 based on the graphene-based SkelCap ultracapacitors.....	147
Figure 61: Energy harvesting textile.....	149
Figure 62: LG Chem Hexagonal battery.....	151
Figure 63: Printed 1.5V battery.....	153
Figure 64: H600 concept car.....	154
Figure 65: Anion concept car.....	155
Figure 66: Potential addressable market for graphene in the thin film, flexible and printed batteries market.....	157
Figure 67: Demand for graphene in batteries (tons), 2018-2030.....	158
Figure 68: Skeleton Technologies ultracapacitor.....	164
Figure 69: Zapgo supercapacitor phone charger.....	165
Figure 70: Stretchable graphene supercapacitor.....	166
Figure 71: Potential addressable market for graphene in supercapacitors.....	168
Figure 72: Demand for graphene in supercapacitors (tons), 2018-2030.....	169