



**FLOW
BATTERIES
EUROPE**

A united voice for flow batteries



ACTIVITY REPORT 2025



**EMBRACING SUCCESS
AND SHAPING TOMORROW**



Acknowledgment

Special acknowledgement to the FBE members who helped make this publication possible.

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Welcome by FBE President, Kees van de Kerk

2025 has been shaped by an increasingly complex set of overlapping crises and structural factors affecting the energy system: heightened geopolitical tensions, the rapid expansion of AI-driven data centres, ongoing affordability pressures, and an intensifying global race towards a clean and decarbonized energy system. Building a strong domestic sustainable supply chain for EU produced energy storage solutions should be a top priority.

Despite the uncertainties, the trajectory of the energy transition is unequivocal: the EU needs long-duration energy storage solutions to deliver a competitive, secure and affordable transition to clean energy. And this represents a pivotal moment for flow batteries.

FBE believes that the flow battery sector is a dynamic and mature industry, which is ready to play a central role in the energy transition and deliver on its promising future. Flow batteries combine exceptional safety, scalability, sustainability and high levels of recyclability with technical maturity. They are well positioned to support the European energy transition by enabling a flexible, affordable, and resilient and energy system produced in Europe.



Kees van de Kerk

Flow Batteries Europe
President

“

The trajectory of the energy transition is unequivocal: the EU needs long-duration energy storage solutions (...) and this represents a pivotal moment for flow batteries.

As Europe shifts to cleaner and more secure energy sources, the importance of supporting technologies, such as energy storage, is also growing. However, the deployment of these fundamental, complementary assets is not yet sufficient. In 2023, renewables accounted for 24.5% of EU energy consumption, and as their share increases, the system will increasingly depend on long-duration energy storage (LDES) to maintain stability. Research shows that when renewables supply 40–50% of a grid's electricity, average storage durations of four hours or more are required, with a significant portion of national systems needing storage over days or even seasons. Flow batteries are ready to meet this need and enable a flexible, resilient, and cost-effective European energy system, supporting decarbonisation while maintaining competitiveness and energy security.

Already deployed across the world, flow batteries are contributing to the global energy transition at both small and large scales. LDES technologies, including flow batteries, have received substantial support from local and national governments in countries such as the United Kingdom, China, and the United States, where they have been deployed at significant scale. To avoid falling behind and becoming dependent on imports of LDES technologies, as it has occurred with the cases of PV and lithium batteries, the EU must begin investing in a targeted and strategic manner in LDES and flow batteries.

Investing in flow batteries contributes to the EU's energy security strategy, as well as delivering an energy transition that is built in Europe, safe, affordable and sustainable. That is why FBE is advocating for LDES capacity targets, and improved market conditions for long duration storage assets like flow batteries.

In 2025, FBE launched our carbon footprint working group, which developed a draft methodology for the carbon footprint calculation for flow batteries, and is developing model carbon footprint results. This group will highlight the sustainability benefits of flow batteries and help members to prepare for the requirements of the EU Batteries Regulation. The dedicated Working Group unites 16 stakeholders from across the flow battery value chain—including both FBE members and non-members—and is expected to deliver results in 2026. These results will be shared with the European Commission's Joint Research Centre (JRC) to support the development of rules for flow battery carbon footprint calculation, ensuring the industry remains actively engaged and represented in the process.

I would like to thank the FBE Secretariat, Secretary General Anthony Price, and all members for their dedication, energy, and contributions throughout the year. I look forward to continuing FBE's important work under a renewed and energised structure, representing the interests of the flow battery sector and advancing its role at the forefront of Europe's clean energy transition.



About Flow Batteries Europe

Flow Batteries Europe (FBE) represents flow battery stakeholders with a united voice to develop a long-term strategy for the flow battery sector.

We help shape the legal framework for flow batteries at the EU level, contribute to the EU decision-making process, as well as define R&D priorities. FBE is working to create and reinforce networks between key stakeholders in the flow battery industry.

This report looks at the past year and some of our key achievements. FBE aims to accelerate decarbonisation in Europe and beyond by increasing the deployment of energy storage and flexibility solutions through flow battery applications.

The association gathers interested stakeholders to advance research, commercialisation and deployment of flow batteries. To achieve this, FBE engages and promotes flow batteries with European and other relevant organisations.

FBE'S PRIORITIES



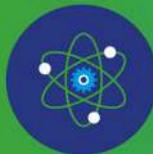
Unite flow battery stakeholders to speak with a powerful and unified voice.



Advocate for more lighthouse projects in the EU and update members on funding opportunities at the EU level.



Identify key business cases and contexts where flow batteries tend to do better than other technologies.



Showcase flow battery projects and success stories. Promote the advantages of flow batteries.



Advocate for a harmonised EU-level legal framework focused on non-fossil solutions, with consistent implementation across Member States.



FBE Structure

President

Kees van de Kerk (Volterion)

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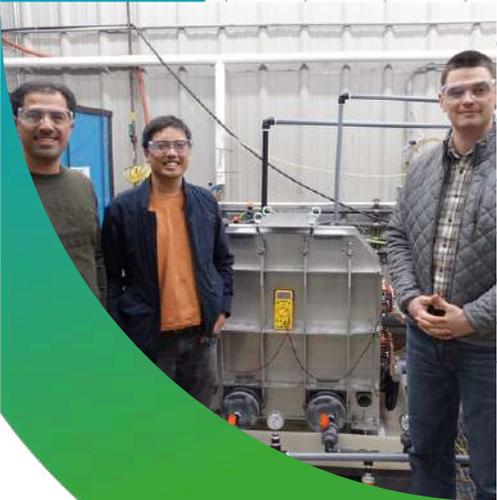


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Recap of the year

● January

On 29 January, the European Commission publishes the Competitiveness Compass, outlining strategic policy priorities with a focus on innovation, decarbonisation, and reducing dependencies. FBE welcomes the initiative to increase investment in energy storage but regrets the delay to the Electrification Action Plan and the European Grids Package.

● February

The Commission announces the Clean Industrial Deal. The plan outlines initiatives that aim at fostering the EU's industrialisation through decarbonisation, including through the acceleration of the energy transition.

FBE publishes the Activity Report for 2024.

● March

Two new members join FBE: Flow-nano and AMG Titanium.

The Smarter E Podcast produces an episode with contributions from the FBE Secretariat and FBE member organisations.

● April

FBE holds the Hybrid Kick-off Meeting for the Working Group on Carbon Footprint Rules for Flow Batteries.

● May

FBE publishes "Building Flow Batteries in Europe: A Path to Ethical and Sustainable Energy Storage". The piece highlights how flow batteries could help the EU localise energy production, avoid environmental and human rights issues linked to global supply chains, and adhere to environmental and labour standards.

● June - July

The FBE Secretariat attends the "Industrializing Clean Tech in Europe" event.

FBE publishes the statement on "Invinity Energy Systems selected for multiple UK LDES Cap & Floor bid applications" and the press release on "Europe's largest flow battery project launched to boost energy security".

FBE's 12th General Assembly takes place in Vienna, Austria, and it is attended by 16 members in-person and online.

FBE co-organises and participates to IFBF 2025, which is attended by more than 350 delegates.

RKP Germany joins FBE



● August – September

FBE members and Ecomatters BV finalise the first draft of the Carbon Footprint calculation for flow batteries.

FBE publishes the paper on the case study “California as a best-practice example for energy storage deployment: Lessons for the EU”.

● October

The FBE Secretariat participates to the Energy Storage Global Conference, moderates a session at the Airport Electrification Europe conference, and speaks at Flow Batteries North America 2025. These events allow FBE to connect with key players from the energy and storage industries, and participate to ongoing policy discussions.

Phoenix Metals and Invinity join FBE.

FBE publishes two papers: “The Potential for a Fully European Flow Battery Supply Chain”, and “The Synergies of Flow Battery–Gas Plant Hybrids for Increased 2-Way Flexibility”.

● November

FBE holds two webinars: “Europe’s Path to a Complete Flow Battery Supply Chain” and “Harnessing Flow Batteries to Power AI & Data Centres”. These webinars contribute to FBE’s advocacy strategy and help broadening FBE’s audience. The two webinars tackle the issues of flow battery supply chains, and their contribution to resilient and flexible data centres.

FBE publishes the paper on flow batteries safety in comparison with other storage solutions such as lithium-ion.

FBE 13th General Assembly takes place in Brussels, Belgium, in-person and online. FBE also organises a complementary internal workshop on Horizon Europe funding opportunities.

● December

FBE attends the Joint European Parliament–EARTO event on “The Future of EU Investments in Critical Technologies” at the European Parliament.

The FBE Secretariat participates to Battery Innovation Days 2025 in Graz, Austria.

FBE publishes its position paper on the European Grids Package, where it urges the EU to fully recognise and integrate LDES, especially flow batteries, into grid planning, permitting, and infrastructure rules.



Advocacy Work

The EU's Clean Industrial Deal



On 29 January 2025, the European Commission launched the **Competitiveness Compass**, establishing a strategic framework and “economic doctrine” to guide EU economic and industrial policy for the 2024–2029 mandate. This framework highlighted the need to align the EU's decarbonisation with competitiveness, which translated in the announcement of the **Clean Industrial Deal** in February 2025.

The aim of this plan is to revitalize Europe's industrial base while accelerating the energy transition through several initiatives to be published from late 2025 until the end of 2026, such as the **European Grids Package, the Industrial Accelerator Act, the Data Centre Energy Efficiency Package**. These initiatives are particularly relevant to key energy industry players, including flow battery manufacturers, which is why FBE has concentrated its advocacy and lobbying efforts on these policies in the latter part of the year.

The **European Grids Package**, which was published on 10 December 2025, advanced key legislative and policy proposals relevant to flow batteries, such as the directive on the acceleration of permitting procedures and the regulation on trans-European energy infrastructure. These proposals reflected the increasing role of storage for Europe's energy systems by prioritising “non-wire solution” in networks, accelerating their permitting procedures and extending overriding public interest status to storage assets. Together, these measures aim to reduce administrative barriers, accelerate deployment, and support the scaling-up of clean energy infrastructure across the EU; however, the real needs of the LDES sector were not sufficiently reflected in these proposals.

To make sure the Grids Package would support the LDES and flow battery industry, FBE monitored the policy developments around the package and prepared a **position paper outlining the industry's priorities**.

FBE's key policy changes are promoting LDES deployment through clear **national and regional targets**, prioritising LDES in areas with high renewable curtailment or grid congestion, **recognising storage technologies** that enhance renewable integration even at the distribution level, and establishing **standardised, storage-specific documentation** that reflects the technical and environmental characteristics of flow batteries, such as their non-flammability, absence of toxic emissions, and minimal noise and visual impact.

As several policy initiatives linked to the Clean Industrial Deal and relevant to flow batteries were scheduled for publication in 2026, FBE worked to influence the European Commission's preparatory work in these policy areas. These included the implementation of existing **non-price criteria to energy infrastructure projects** and the creation of new ones, particularly related to **supply chain issues**, and the integration of **data centres** with energy storage to enhance **grid resilience**.

“The European Grids Package (...) advanced key legislative and policy proposals relevant to flow batteries, such as the directive on the acceleration of permitting procedures and the regulation on trans-European energy infrastructure. These proposals reflected the increasing role of storage for Europe's energy systems



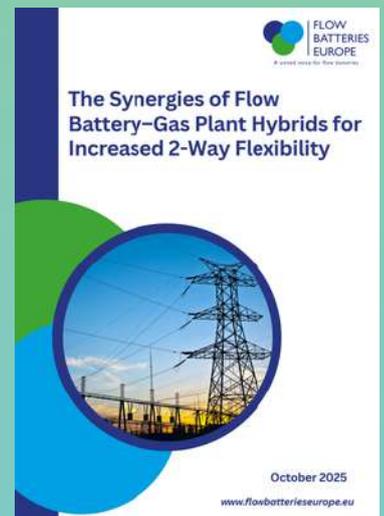
FBE actively engaged in the policy debates around the legislative and non-legislative initiatives related to the Clean Industrial Deal by meeting officials from the European Commission to give them relevant information on flow batteries, connecting with stakeholders from the sector and aligning on key messages, publishing papers and reports, issuing press releases and organising initiatives to facilitate discussion on key topics.

Among these, FBE organised **two webinars** for energy stakeholders and policymakers, focusing respectively on the development of a **European flow battery supply chain** and on the role of flow batteries in enabling the **deployment of data centres in Europe**. These events engaged with more than 100 and 200 participants respectively, successfully showing the impact that FBE has created, not only in Europe but worldwide. The webinars provided valuable insights to inform the industry and reinforced our engagement with policy makers.

Complementing these webinars, FBE produced several publications addressing issues central to ongoing EU policy discussions. Among them, the paper **“The Potential for a Fully European Flow Battery Supply Chain”** examines Europe’s dependence on third countries for battery supply chains, as well as its limited vanadium mining and refining capacity. Addressing these challenges could unlock the EU’s potential to develop a fully localised flow battery supply chain, reduce supply risks and import dependencies, and establish a more predictable business case and market framework for the flow battery and LDES industry in Europe.

FBE also developed analytical publications on long-duration energy storage (LDES) governance best practices, including the article **“California as a Best-Practice Example for Energy Storage Deployment: Lessons for the EU”** and the forthcoming report **“LDES Governance Best Practices”**. These outputs form part of FBE’s broader advocacy strategy and aim to provide EU policymakers with concrete recommendations and evidence-based case studies from Europe and beyond, demonstrating how LDES deployment can be effectively supported through appropriate regulatory and financial frameworks.

Additional relevant publications by FBE include an internal briefing on the **“GB Cap-and-Floor Mechanism”** and the report **“The Synergies of Flow Battery–Gas Plant Hybrids for Increased Two-Way Flexibility”**. The former supports stakeholders in navigating the updated scheme and understanding the eligibility criteria for accessing long-term revenue certainty. The latter highlights how hybrid systems combining energy storage technologies such as flow batteries with gas-fired power plants can enhance grid stability and flexibility, reduce curtailment, and lower operating costs.



Comprehensive reviews of policy topics are available to members of Flow Batteries Europe.



EU Funding Advocacy

As FBE brings together not only industry players from the energy sector, but also research institutes, organizations and start-ups, throughout 2025 the Secretariat has informed FBE members on relevant EU funding opportunities.

Apart from regular updates, FBE organised a workshop with an EU funding expert, who guided participants through the key steps for successful participation in Horizon Europe calls, and speakers from two slow battery EU-funded projects, who presented their innovative work and shared their experience on participating in EU Horizon funding calls.

The workshop gave FBE members the basic knowledge and instruments to participate to such calls, including information on soft and technical call requirements, how to build strong consortia, and how to structure project applications to maximise impact and funding opportunities.

GB Cap-and-Floor Mechanism

In October 2024, the UK Department for Energy Security and Net Zero confirmed plans to support LDES projects through a cap-and-floor mechanism. This model addresses high upfront costs and unpredictable revenue by providing top-up payments if revenues fall below the floor and requiring developers to return excess earnings above the cap.

As one of the first schemes targeted specifically to LDES worldwide, FBE continued monitoring this program throughout 2025 to inform FBE members on relevant updates. These monitoring efforts resulted in the internal Members Brief on "GB Cap-and-Floor Mechanism", which served to provide members with information on eligibility criteria, requirements and deadlines to participate in the scheme.



Working Group on Carbon Footprint Calculation for Flow Batteries

Batteries Regulation: The Carbon Footprint Declaration

As the Battery Regulation takes a full life cycle approach, a central part of the legislation is that battery producers, importers, and distributors along the EU supply chain have to report on their batteries' carbon footprint (CFB). The CFB must consider the raw material acquisition and pre-processing, main product production, distribution, and end-of-life and recycling. From 2030 onwards, every flow battery placed on the European market must include this information in a Carbon Footprint Declaration.

The project: Developing a Robust Methodology

To proactively address these requirements, FBE has a dedicated carbon footprint working group with 16 industry stakeholders. This effort aims to help shape future CFB rules while preserving industry credibility and competitiveness.

The project officially kicked off in Spring 2025 with the first meeting addressing unique properties of flow batteries that must be reflected in the rules and methodology to calculate the carbon footprint. The first Technical Meeting soon followed, to discuss and gather feedback on implementing these into the rules and methodologies as required by the Batteries Regulation. Over the summer, the first draft of the rules and methodology for the calculation of the carbon footprint for flow batteries was developed and feedback was collected from working group members. Simultaneously, data was collected from 6 working group members to develop generic flow battery models to apply the rules and methodology on, to develop a generic score for the carbon footprint of a metal-based chemistry and organic based chemistry flow battery. Going into 2026, these models are being finalised and the working group is expected to complete its work in Spring 2026. These results, as well as the developed rules and methodology will be shared with the JRC team which will begin their work to develop the EU official rules and methodology later in 2026.

The Outcome: Acquiring Skills and Shaping Final Rules

By participating, organisations are not only preparing for future regulatory requirements but are also actively influencing the European Commission's final calculation rules. The project has already been discussed with the European Commission's JRC and ensures the flow battery industry is involved and prepared in the process of developing rules and methodologies for flow batteries. The result of the carbon footprint based on the general models of metal and organic flow batteries will also provide a benchmark to evaluate flow batteries in comparison with lithium ion. This initiative ensures the sector remains compliant, competitive, and ready for the upcoming challenges.



01

The smarter E Podcast with Anthony Price and John Alper - January 2025

FBE's Secretary General Anthony Price and Head of FBE's Technical Committee John Alper were invited to record a discussion centered around how flow batteries can help the EU address multiple, intertwined energy challenges by providing flexibility, cost-efficiency, resilience and sustainability for the "The smarter E podcast." This was hosted by Smarter E, one of Europe's Largest Alliance of Exhibitions for the Energy Industry.



02

EES Europe, Munich — May 2025

The FBE Secretariat and many FBE members visited ees – electrical energy storage conference in Munich, Germany, from 7-9 May. This event is Europe's largest international exhibition for batteries and energy storage systems. FBE's exhibition stand attracted many key players from the energy storage sector, and we showcased our work in the field of flow batteries, and discussed market and regulatory issues in the sectors

FBE's 12th General Assembly, Vienna — June 2025

Our 12th General Assembly held in Vienna prior to the IFBF was attended by 16 members. We reviewed the association's advocacy activities, ongoing projects, publications, communications campaigns, successes stories and achievements of 2025. We welcomed three new members: Flow-nano, AMG Titanium and Rongke Power.

03



04

The International Flow Battery Forum, Vienna — June 2025

FBE participated both as co-organizer and exhibitor at IFBF 2025, which attracted over 350 attendees. The event was hosted in Vienna by FBE member CellCube, and it gave the opportunity to FBE members to showcase their projects throughout Europe and beyond, connect with industry players, and discuss hot market and policy-related topics in the field of storage and LDES.

Visibility and Events



05

Energy Storage Global Conference, Brussels – October 2025

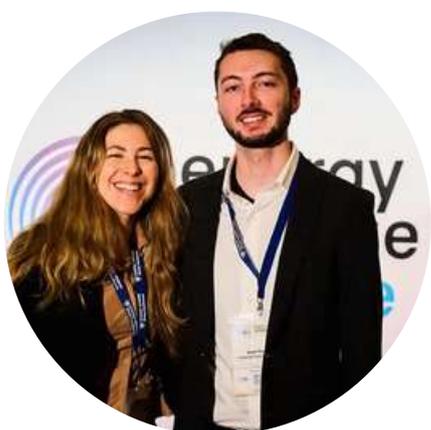
FBE attended the Energy Storage Global Conference (ESGC) along with more than 300 energy storage stakeholders and policymakers. With three separate days dedicated respectively to policy, market, and technology, the event served the FBE Secretariat to meet some FBE members, connect with stakeholders and engage in conversations on LDES policy and market design.



06

Airport Electrification Europe, Amsterdam – October 2025

FBE participated to the conference as supporting partner, and FBE's Policy Officer Jesse Terry moderated a panel discussion on the "Integration of Renewables and Storage for Smart Airports", where he also spoke about the benefits of integrating flow batteries in airports and micro-grids projects.



07

Flow Batteries North America 2025, Chicago – October 2025

FBE's President, Kees van de Kerk, spoke about the opportunities for flow batteries in Europe at this first meeting of a new North American group dedicated to flow batteries. The panel following his presentation discussed the European policy framework for flow batteries, related challenges and opportunities, and existing innovative flow battery projects in Europe.



08

FBE's 13th General Assembly – December 2025

The FBE Secretariat organised the association's second General Assembly of the year in Brussels, to update the members on FBE's advocacy activities, publications, communications campaigns, and ongoing projects. FBE members agreed on a renewed internal structure and working approach, designed to strengthen collaboration among members and significantly enhance FBE's impact on EU policymaking during 2026.

09

Battery Innovation Days, Graz – December 2025

The FBE Secretariat attended the Battery Innovation Days conference in Graz, Austria, along with more than 500 battery stakeholders and policymakers. The event allowed FBE to connect particularly with research institutes and organisations, and to explore future collaborations on policy-related topics.





Closing comments by the FBE Secretary General, Anthony Price



Anthony Price

Flow Batteries Europe
Secretary General

Throughout 2025, FBE significantly intensified its efforts to support the deployment of flow batteries in Europe, contributing to a more resilient, sustainable, safe, and affordable energy transition. Building on strong foundations from past years we have increased our dialogue and cooperated with key European and international industry stakeholders. We have also increased our contact with the EU institutions to ensure that the sector's needs are clearly heard and understood. Although the path towards a fully enabling regulatory framework remains long, flow batteries are market-ready and delivering proven results worldwide: FBE's goal is to make Europe a thriving market for flow batteries.

Over the past year, FBE worked closely with industry players, decision-makers, and partner associations to raise the visibility of flow batteries and secure their recognition as a cornerstone technology for Europe's energy transition. In doing so, FBE has consistently supported the EU's decarbonisation objectives, which can only be achieved through the large-scale deployment of LDES, including sustainable solutions such as flow batteries.

To amplify this message, FBE fostered close collaboration among companies, research organisations, and institutions across the entire flow battery value chain, while delivering impactful advocacy, communication, technical, and policy initiatives throughout the year. These efforts have supported best practices for market uptake and reinforced the strategic role of flow batteries in enhancing grid resilience, enabling renewable integration, and delivering reliable LDES.

This message was consistently conveyed across all events in which FBE participated throughout 2025. Specifically, as we were co-organiser of the International Flow Battery Forum (IFBF) 2025 held in Vienna, Austria, we were able to speak directly to colleagues from around the world, gain from their experience, present the work of FBE, and recruit new members. The IFBF is the major annual flow battery event for discussion of policy, sharing innovation and this year was attended by more than 350 international stakeholders.

In addition to IFBF 2025, FBE actively contributed to several other flagship events, including EES Europe in Munich, the Energy Storage Global Conference in Brussels, Airport Electrification Europe in Amsterdam, Flow Batteries North America 2025 in Chicago, and the Battery Innovation Days in Graz,

Austria. During the year, the FBE Secretariat engaged with a broad range of industry players and research organisations, promoting the role of flow batteries in the energy sector, strengthening cooperation across the value chain, and identifying opportunities for market deployment.

In 2025, we have increased our advocacy and communications efforts, by delivering a broad range of capacity-building and communication activities, including our popular webinars, interviews, and analytical reports. FBE also continued to actively engage its members in structured dialogue and collaboration, notably through the ongoing work of the Working Group on Carbon Footprint for Flow Batteries. These initiatives have reinforced the association's ability to articulate clear, evidence-based positions and to support the sector's visibility and credibility at EU level.

As the importance of flow batteries grows within the world and Europe's energy transition, we recognise the need to change our organisational structure to increase our effectiveness in our work with the European Institutions. For this reason, FBE has initiated a reform of its working structure, which will strengthen policy co-ordination, improve our technical input into regulatory discussions and so be of more value to our members and stakeholders.

We are proud of what we have achieved in 2025 and we look forward to seeing more flow battery deployment across Europe in 2026. Join us as a member if you want to ensure that the sector's voice is clearly heard at both the EU and national levels.



FBE Members

FBE now brings together 32 members from across the entire flow battery value chain! 6 new members joined the association over the last year. We look forward to welcoming many more!



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ABOUT FLOW BATTERIES EUROPE

Flow Batteries Europe (FBE) represents flow battery stakeholders with a united voice to shape a long-term strategy for the flow battery sector. We aim to provide help to shape the legal framework for flow batteries at the EU level, contribute to the EU decision-making process as well as help to define R&D priorities. FBE is working to create and reinforce networks between key stakeholders in the flow battery industry.

GET IN TOUCH

Get in contact with Jesse Terry at j.terry@flowbatterieseurope.eu and check out our platforms below:



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