

# **Global VRLA Battery Market Size Study and Forecast by Voltage (2V, 4V, 6V, 12 V, and Others), Type (AGM (Absorbent Glass Mat) Batteries, Gel Batteries, and Others), End Use Industry (Industrial, Commercial, Residential, Utilities, Telecom Operators, and Data Center Operators), Regional Forecasts 2026-2036**

<https://marketpublishers.com/r/GA3A1B596EC9EN.html>

Date: June 2026

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: GA3A1B596EC9EN

## **Abstracts**

Global VRLA battery market valued at USD 18.91 billion in 2025 is anticipated to reach USD 29.70 billion by 2036, growing at 4.19% CAGR during the forecast period.

The global VRLA battery market continues to maintain a critical role in backup power infrastructure, telecommunications networks, industrial systems, and energy storage applications. Market growth is driven by expanding data center capacity, increasing telecom network deployments, rising demand for uninterrupted power supply systems, growing utility infrastructure investments, and continued adoption of backup power solutions across commercial facilities. Data center expansion represents the strongest growth catalyst. According to the International Energy Agency, global data center electricity consumption is projected to increase substantially through the next decade as digitalisation accelerates. Operators continue investing in reliable backup power systems to ensure operational continuity. VRLA batteries offer maintenance-free operation, proven reliability, cost effectiveness, and broad deployment flexibility. These advantages sustain adoption across mission-critical applications. Expanding digital infrastructure and increasing dependence on continuous power availability continue to support long-term demand for VRLA battery technologies.

The VRLA battery market represents the manufacturing, deployment, and replacement of valve-regulated lead-acid batteries used across backup power, telecommunications,

industrial equipment, and energy storage systems. These batteries play a strategic role in ensuring power continuity during outages and grid disturbances. The market remains relevant because organisations continue prioritising operational resilience and infrastructure reliability. VRLA batteries offer established performance characteristics, mature supply chains, and competitive economics compared with many alternative technologies. Industry participants continue improving battery efficiency, service life, and operational safety. Future significance will remain strong across stationary energy storage applications despite increasing competition from lithium-ion technologies. VRLA batteries continue serving as a dependable energy storage solution for critical infrastructure sectors worldwide.

## Research Scope & Methodology

This study evaluates the global VRLA battery market by voltage, type, and end use industry segments. The assessment covers 2V, 4V, 6V, 12V, and other voltage categories. Battery type analysis includes AGM batteries, Gel batteries, and other VRLA battery technologies. End use assessment covers industrial, commercial, residential, utilities, telecom operators, and data center operators. Regional analysis evaluates market dynamics across North America, Europe, Asia Pacific, and LAMEA while examining the broader battery value chain.

The research combines primary interviews with battery manufacturers, distributors, telecom operators, utility companies, data center operators, and industry specialists. Secondary research incorporates government publications, energy agencies, telecommunications organizations, industry associations, and company disclosures. Market sizing integrates battery production volumes, replacement cycles, infrastructure investments, and energy storage demand patterns. Forecasting models evaluate technology adoption, infrastructure development, digitalization trends, and backup power requirements. Competitive benchmarking assesses leading manufacturers and technology providers. Data triangulation validates findings through multiple independent information sources.

## Key Market Segments

### By Voltage

2V

4V

6V

12V

Others

### By Type

AGM (Absorbent Glass Mat) Batteries

Gel Batteries

Others

### By End Use Industry

Industrial

Commercial

Residential

Utilities

Telecom Operators

Data Center Operators

### Industry Trends

The VRLA battery industry continues to benefit from growing demand for backup power systems across critical infrastructure sectors. Reliability remains the primary purchasing criterion for end users.

Data center operators are expanding backup power capacity to support increasing

workloads associated with cloud computing, artificial intelligence, and digital services. These developments are generating demand for stationary battery systems.

Telecommunications infrastructure expansion remains a major contributor to the market growth. Mobile network operators continue deploying additional base stations to support increasing data traffic and network coverage requirements.

AGM battery technology continues to maintain strong market acceptance due to its operational reliability and maintenance-free characteristics. Manufacturers continue improving cycle life and performance efficiency.

Utility companies increasingly deploy energy storage systems to support grid resilience and power continuity. Backup power solutions remain important for substations and critical network infrastructure.

Industrial facilities continue investing in uninterrupted power supply systems to protect operations from power disruptions. Sectors such as manufacturing, healthcare, and transportation remain key demand centers.

Battery manufacturers are focusing on extending service life and improving charging performance. Product innovation aims to enhance operational efficiency while reducing lifecycle costs.

Asia Pacific remains the largest manufacturing hub for lead-acid batteries. Established production ecosystems and strong domestic demand support regional market leadership.

Sustainability initiatives are encouraging battery recycling and circular economy practices. Lead-acid batteries have one of the highest recycling rates among battery technologies globally.

Competition from lithium-ion technologies continues to increase. However, VRLA batteries retain strong positioning across applications where cost effectiveness, reliability, and proven operational performance remain critical purchasing considerations.

## Key Findings of the Report

**Market Size (2025): USD 18.91 Billion**

Estimated Market Size (2036): USD 29.70 Billion

CAGR (2026-2036): 4.19%

Leading Regional Market: Asia Pacific

Leading Segment: 12V Batteries

Leading Battery Type: AGM Batteries

## Market Determinants

### Expanding Global Data Centers

According to the International Energy Agency, expansion of digital infrastructure continues to increase data center electricity consumption worldwide. Data centers require highly reliable backup power systems to prevent operational disruptions. Growing facility construction supports recurring demand for VRLA battery installations and replacement cycles.

### Growing Telecom Infrastructure Investments

Telecom operators continue expanding network coverage and capacity. Rising mobile data consumption requires additional base stations and network infrastructure. VRLA batteries provide dependable backup power for telecommunications equipment, supporting long-term market growth.

### Rising Demand For Power Continuity

Businesses increasingly prioritise operational resilience and uninterrupted service delivery. Backup power systems reduce risks associated with grid instability and power outages. Growing dependence on continuous operations strengthens demand across commercial and industrial sectors.

### Strong Battery Recycling Ecosystem

Lead-acid batteries benefit from a well-established recycling infrastructure. According to

the Battery Council International, lead batteries achieve recycling rates exceeding 99% in North America. Strong recycling capabilities improve sustainability performance and support long-term industry viability.

### Utility Grid Reliability Requirements

Utilities continue investing in grid modernisation and resilience initiatives. Battery systems support substations, control systems, and emergency operations. Increasing infrastructure upgrades create favourable demand conditions for VRLA battery deployment.

### Opportunity Mapping Based on Market Trends

#### Emerging Edge Data Centers

Distributed computing infrastructure is expanding rapidly across urban and regional markets. Edge data centers require compact and reliable backup power systems. Growing deployment creates attractive opportunities for VRLA battery suppliers.

#### Telecom Network Modernisation Programs

Telecommunications operators continue upgrading infrastructure to support advanced connectivity services. Network modernisation projects require dependable backup energy storage solutions. Manufacturers can capitalise on growing telecom investments.

#### Grid Resilience Infrastructure Projects

Governments and utilities increasingly prioritise power system resilience. Investments in substations, backup systems, and emergency infrastructure support demand for stationary battery technologies. VRLA suppliers can strengthen participation in these projects.

#### Advanced AGM Battery Innovation

Manufacturers continue developing AGM batteries with improved lifecycle performance and charging efficiency. Product enhancements create opportunities to strengthen competitiveness and address evolving customer requirements across critical applications.

## Value-Creating Segments and Growth Pockets

### By Voltage

By Voltage, the market is segmented into 2V, 4V, 6V, 12V, and Others. Currently, 12V dominates the market with an estimated 46.9% share in 2025. Leadership stems from widespread adoption across UPS systems, telecom infrastructure, security systems, emergency lighting, and commercial backup power applications. Strong compatibility with existing infrastructure and broad availability continue to support market leadership.

2V is expected to register the fastest CAGR of 5.1% during 2026-2036. Growing deployment in large stationary energy storage systems, telecom facilities, and industrial backup power applications supports future growth. Infrastructure investments increasingly favour scalable battery configurations.

### By Type

By Type, the market is segmented into AGM Batteries, Gel Batteries, and Others. Currently, AGM Batteries dominate the market with an estimated 58.4% share in 2025. Market leadership reflects maintenance-free operation, superior charge acceptance, operational reliability, and broad adoption across telecom, UPS, and industrial applications. Commercial deployment remains strongest within mission-critical backup power systems.

Gel Batteries are expected to register the fastest CAGR of 4.8% during 2026-2036. Enhanced deep cycle performance, improved temperature tolerance, and increased use in specialised industrial applications support growth. Manufacturers are emphasising improved product capabilities to address evolving end-user requirements.

### By End Use Industry

By End Use Industry, the market is segmented into Industrial, Commercial, Residential, Utilities, Telecom Operators, and Data Center Operators. Currently, Telecom Operators dominate the market with an estimated 29.6% share in 2025. Leadership stems from extensive network infrastructure, growing demand for mobile connectivity, widespread deployment of backup systems, and continuous network expansion programs. Telecom facilities require dependable energy storage solutions to maintain service continuity.

Data Center Operators are expected to register the fastest CAGR of 6.2% during 2026-2036. Rising cloud computing adoption, artificial intelligence workloads, and digital transformation initiatives are accelerating data center investments. Backup power requirements create significant opportunities for battery manufacturers.

## Regional Market Assessment

### North America

North America maintains a significant position in the global VRLA battery market due to extensive data center infrastructure, mature telecommunications networks, and strong industrial demand. The region benefits from growing investments in digital infrastructure and backup power systems. Data center operators are focusing on capacity expansion to support cloud services and artificial intelligence applications. These developments sustain demand for reliable battery technologies.

### Europe

Europe represents an important market supported by industrial automation, utility modernisation, and telecommunications infrastructure investments. The region maintains a strong demand for backup power systems across commercial and industrial sectors. Sustainability initiatives and battery recycling programs further strengthen market stability. Continued investments in critical infrastructure support long-term growth prospects.

### Asia Pacific

Asia Pacific dominates the global VRLA battery market with an estimated 43.7% share in 2025. Regional leadership stems from large-scale battery manufacturing capacity, expanding telecom infrastructure, growing industrialisation, and rising investments in digital infrastructure. According to the GSMA, Asia Pacific region remains one of the largest mobile connectivity markets globally. Strong production ecosystems and domestic demand continue to support regional leadership.

### LAMEA

LAMEA is expected to register the fastest CAGR of 4.9% during 2026-2036. Growth acceleration reflects increasing telecommunications investments, expanding utility infrastructure, and growing commercial construction activity. Governments continue

investing in digital connectivity and power infrastructure projects. Rising demand for reliable backup power solutions creates favourable long-term market opportunities.

## Recent Developments

March 2025: EnerSys expanded production capabilities for advanced VRLA battery systems targeting telecommunications and data centre applications. The investment strengthens supply capacity and supports growing infrastructure demand.

January 2025: Exide Technologies launched enhanced AGM battery solutions designed for critical backup power environments. The development improves operational reliability and supports infrastructure modernisation initiatives.

September 2024: Clarios expanded battery recycling and manufacturing programs to support sustainable lead-acid battery supply chains. The initiative strengthens circular economy objectives across the industry.

June 2024: Leoch International increased production investments for telecom and industrial VRLA battery applications. The expansion reflects growing demand from infrastructure and backup power markets.

## Critical Business Questions Addressed

How large is the VRLA battery market opportunity through 2036?

The market is projected to grow from USD 18.91 billion in 2025 to USD 29.70 billion by 2036, supported by expanding digital infrastructure and backup power requirements.

Which factors will drive future market growth?

Data center expansion, telecom infrastructure investments, power continuity requirements, utility modernisation, and robust battery recycling ecosystems are the primary growth drivers.

Which segments offer the strongest value creation opportunities?

12V batteries currently generate the largest revenues, while data centre applications

and 2V battery systems present attractive future growth opportunities.

Which regions offer the most attractive commercial prospects?

Asia Pacific remains the dominant market due to manufacturing leadership and infrastructure expansion, while LAMEA offers the fastest growth potential supported by telecom and utility investments.

How will competition evolve across the industry?

Competitive positioning will increasingly depend on battery lifecycle performance, operational reliability, recycling capabilities, manufacturing scale, and application-specific product innovation.

Beyond the Forecast

VRLA batteries will remain essential components of critical infrastructure despite increasing competition from alternative battery technologies.

The industry's future growth will increasingly depend on the expansion of digital infrastructure, telecom modernisation, and investments in utility resilience.

Manufacturers that combine operational reliability, sustainability initiatives, and advanced battery performance capabilities will strengthen their competitive positioning throughout the forecast period.

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