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Battery Storage for Data Centers & Commercial Industry 2026–2036

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Abstracts

The commercial and industrial battery energy storage system market is entering a period of sustained and broad-based expansion. Long viewed as a secondary segment behind grid-scale and residential storage, C&I BESS is now attracting serious attention from investors, policymakers, and technology developers alike, driven by a convergence of structural forces that did not exist in the same form even five years ago.

The most immediate and powerful demand driver is the AI-fuelled surge in data center construction. Across the United States, Europe, and Asia, hyperscale operators and colocation providers are racing to bring capacity online at a pace that conventional grid infrastructure cannot support. Interconnection queues stretching years into the future have turned battery storage from an operational convenience into a strategic necessity. Behind-the-meter BESS systems are now being deployed not merely to provide uninterruptible power supply — their traditional role — but to demonstrate grid flexibility to utilities, enabling faster interconnection approvals and allowing facilities to come online years ahead of schedule. The financial logic is compelling: the cost of a battery system is trivial relative to the revenue foregone by a delayed data center. At the same time, the shift toward AI compute workloads introduces MW-scale swings in power demand within a single facility, creating a new application for BESS as a real-time load buffer that smooths consumption and reduces peak demand charges. Both dynamics are accelerating adoption, and data centers are expected to be the fastest-growing C&I BESS application through the late 2020s.

Beyond data centers, the market is diversifying across a wide range of applications. Telecommunications infrastructure remains a large and stable source of demand, with 5G densification ongoing and 6G rollout beginning to shape investment decisions in China in particular. Battery storage at base stations provides critical backup power, and

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the transition from legacy lead-acid to lithium-ion continues at pace, with sodium-ion beginning to emerge as a credible alternative in cost-sensitive deployments. EV charging infrastructure presents a fast-growing opportunity as grid constraints bottleneck DC fast charger deployment, with battery-buffered charging systems increasingly the practical solution for operators who cannot wait for utility upgrades. In construction, agriculture, and mining, the electrification of heavy machinery is creating demand for on-site BESS to support fleet charging at locations that have no meaningful grid connection. These markets are earlier in development but represent significant long-run volume.

The technology landscape is more competitive and more varied than at any prior point. Lithium iron phosphate remains the dominant chemistry across C&I applications, offering a combination of cost, safety, and cycle life that alternatives struggle to match at scale. However, the supply chain politics surrounding LFP are reshaping the competitive landscape, particularly in the United States, where tariffs on Chinese cells and the 45X Manufacturing Production Tax Credit under the One Big Beautiful Bill Act are incentivising domestic production and altering the relative economics of imported versus domestically manufactured systems. This is creating both opportunity and uncertainty for buyers and integrators, and the outcome of this policy experiment will substantially influence where the US C&I BESS market sources its cells through the 2030s.

Alternative technologies are advancing in parallel. Redox flow batteries are gaining traction in data center and high-cycle industrial applications where their minimal degradation, non-flammable electrolyte, and independently scalable power and energy offer genuine advantages over lithium-ion. Sodium-ion is moving from pilot to early commercial deployment, second-life EV batteries are finding their first large-scale data center applications, and nickel-zinc is establishing a foothold in UPS-specific markets. No single alternative is positioned to displace lithium-ion wholesale, but each is carving out defensible niches where the specific demands of the application align with the technology's strengths.

Across all of this, the C&I BESS market is being shaped by a simple underlying truth: reliable, flexible, on-site energy storage is becoming as fundamental to commercial and industrial operations as the grid connection itself.

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from investors, policymakers, and technology developers alike. The global C&I BESS market is forecast to reach US$21 billion in value by 2036, representing approximately fivefold growth from 2026 levels, driven by the AI-fuelled surge in data center construction, 5G and 6G telecoms rollout, EV charging infrastructure deployment, and the electrification of heavy industry.

This report provides granular 10-year market forecasts, primary interview-based competitive intelligence, technology benchmarking, and policy analysis across the full C&I BESS landscape. Key content includes:

Data center BESS: Analysis of AI workload power volatility, interconnection bottlenecks, and the four distinct roles for battery storage — UPS, load buffering, interconnection enablement, and grid flexibility. Includes cost–benefit modelling, UPS topology comparisons, VRLA-to-Li-ion transition economics, the emerging long-duration UPS requirement, and a detailed review of alternative battery technologies including redox flow, sodium-ion, nickel-zinc, and second-life EV batteries at data centers

Telecommunications: Coverage of 2G-to-6G energy demand evolution, LFP vs NMC at base stations, the digital upgrade cycle, sodium-ion for backup power, second-life EV battery deployments, and the 6G-driven demand wave in China

EV charging infrastructure: DC fast charging grid bottlenecks, battery-buffered charging architectures, Infrastructure-as-a-Service models, megawatt charging requirements, and key project case studies

Construction, agriculture and mining: Electrification drivers and barriers by sector, mine-site and farm-site BESS deployment models, portable and modular off-grid systems, and Indonesia mining industry case studies

Other C&I applications: Microgrids, time-of-use arbitrage, peak shaving, and critical facility backup for hospitals, communities, and emergency services

Technology benchmarking: Comprehensive comparison of LFP, NMC, Na-ion, redox flow, VRLA, second-life EV, nickel-zinc, and zinc-bromine chemistries across energy density, cycle life, safety, cost, and application fit

US policy and supply chain: Full analysis of the One Big Beautiful Bill Act, 45X Manufacturing Production Tax Credit, Section 48 ITC, FEOC restrictions, MACR

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thresholds, and a plant-by-plant tracker of US LFP cell manufacturing build-out, with quantitative LFP cost modelling under multiple tariff and tax credit scenarios

Competitive landscape: Strategic positioning of Chinese OEMs, Western integrators, UPS incumbents, and emerging specialists; key M&A, JV, and partnership activity 2024–2026; business model evolution toward energy-as-a-service

10-year forecasts: GWh demand and US$B market value by application and region (China, US, Europe, Rest of World), data center forecasts in GW by region, technology demand mix evolution, and three scenario framework

The report profiles the following companies across lithium-ion OEMs, flow battery developers, sodium-ion players, second-life specialists, alternative chemistries, analytics providers, and infrastructure deployers: ACCURE Battery Intelligence, Accu't, AEGIS Critical Energy Defence Corp., ?sir Technologies, AlphaESS, Alsym Energy, Altairnano / Yinlong, Ambri Inc., Allye Energy, Australian Vanadium Limited, BeePlanet Factory, BESSt, BTRY, BYD Energy Storage, Calibrant Energy, CATL, CellCube, China Sodium-ion Times, CMBlu Energy AG, Connected Energy, Dalian Rongke Power, Eaton Corporation, Eclipse, Elestor, ENGYCell, enspired, Eos Energy Enterprises, ESS Tech, EticaAG, EVE Energy, FlexBase, Fluence, Form Energy, GivEnergy, Gotion, Green Energy Storage (GES), Growatt, H2 Inc., Heiwitt, HiNa Battery Technologies, Idemitsu Kosan, Invinity Energy Systems, iWell, Kemiwatt, Kite Rise Technologies GmbH, Korid Energy / AVESS, Largo Inc., LG Energy Solutions, Luxera Energy, Meine Electric, Mitsubishi Electric, Narada Power, Natrium Energy, Natron Energy, NGK Insulators, Noon Energy, Ormat Technologies, Peak Energy and more.....

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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