

Global Battery Backup Unit (BBU) Power Supply Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Battery Backup Unit (BBU) Power Supply market size was valued at US\$ 975 million in 2025 and is forecast to a readjusted size of US\$ 2109 million by 2032 with a CAGR of 11.8% during review period.

This report studies backup power supplies (BBUs). A backup power supply is a backup battery system used to maintain short-term power supply for critical equipment (such as servers, storage systems, base stations, etc.) when the main power supply fails or is interrupted. In 2024, global shipments of BBUs for server/communication applications were estimated at 2.486 million units, with an average unit price of approximately US\$317. In terms of power, the average price per kilowatt of BBU was approximately US\$90. A single production line (complete unit + battery + control module) has an annual production capacity of approximately 40,000 units. Upstream industries include battery manufacturing (lithium-ion or lead-acid), battery management system (BMS) control chips, charge/discharge control modules, power electronics, power modules, housings and thermal management systems, software and embedded control systems. Downstream industries primarily include data centers, as well as communication base stations, critical infrastructure (such as finance, transportation, and hospitals), and large enterprise IT data centers. In terms of downstream specifications, the current mainstream BBU specifications are 3KW to 5.5KW (48V), while the GB200/GB300 AI server BBU is 48V, 5.5KW per unit, in groups of 6. Regarding gross profit margin, BBU manufacturers can achieve a gross profit margin of 25% to 35%, which may drop to 15% in highly competitive or standardized product phases.

Main driving factors:

1. The explosive demand for AI computing power drives the growth of the BBU market

The rapid development of artificial intelligence technology is reshaping the power demand structure of data centers. AI large model training and reasoning are highly dependent on GPU clusters, and the high power consumption characteristics of GPUs make power supply stability a key guarantee for the continuous operation of computing power. In 2024, the global AI computing power market size has reached 350 billion US dollars, a year-on-year increase of 45%. China's computing power scale has reached 246EFLOPS, accounting for 35% of the global total. This explosive growth has directly driven the increase in BBU market demand.

The yield rate and mass production of NVIDIA GB200 servers are important catalysts for the growth of the BBU market. The server is equipped with A100 Tensor Core GPU, providing up to 300 TFLOPS of floating-point computing power and power consumption of 1400W. In order to meet the extremely high requirements of AI servers for power stability, NVIDIA has listed BBU as a standard configuration for AI servers, rather than an option. Taking the NVL72 server as an example, an NVL72 needs to be equipped with 24 BBUs and 4 sets of BBSs. With the launch of new-generation AI servers such as NVIDIA GB300, BBU usage is expected to increase by more than 50%, and the value of a single BBU will also increase from US\$300-400 to a higher level.

BBU plays an irreplaceable role in AI data centers. When the main power supply is interrupted or insufficient, the BBU battery can quickly take over the power supply, ensuring that the system has enough time to save important data and transfer operations to other servers, thereby protecting data security in the data center and improving system stability and reliability. In practical applications, BBU can make up for the shortcomings of supercapacitors with high-speed response but poor sustainability, as well as the slow response of UPS and diesel generators, and achieve the advantages of second-level response and strong sustainability.

2. Cloud computing expansion and accelerated data center construction

The cloud computing market continues to grow rapidly, providing a broad application scenario for BBU. In 2023, the scale of China's cloud computing market will reach 616.5 billion yuan, a year-on-year increase of 35.5%, and is expected to exceed 2.1 trillion yuan in 2027. The scale of the global cloud computing market will be US\$586.4 billion in 2023, a year-on-year increase of 19.4%, and is expected to exceed US\$1 trillion in 2027. This growth trend has directly led to the expansion of the scale of data center construction, which in turn has increased the demand for backup power supplies.

The high energy consumption characteristics of data centers have increased their requirements for power stability. The power consumption of a single cabinet in a traditional data center is usually 2-8KW, while the power consumption of a single cabinet in an intelligent computing center has reached 20-50KW, and is expected to reach 100KW or even higher in the future. At the same time, the intelligent computing center presents significant dynamic load characteristics, which are manifested as periodicity, high-amplitude fluctuations, multi-task concurrency and instantaneous high-load shocks. Such dynamic characteristics put forward higher adaptability requirements for the power supply system. To solve this problem, the power energy system that matches the infrastructure needs of the intelligent computing center has become a key consideration, among which backup power supplies are a key component.

The "East Data West Computing" project provides policy support and investment opportunities for the BBU market. The total investment of the project exceeds 400 billion yuan, which will guide the computing power demand in the east to the west in an orderly manner, optimize the layout of data center construction, and promote coordinated linkage between the east and the west. The proportion of data centers in the western region has steadily increased, and the national computing power structure has been gradually optimized, while the stability of the power grid in the western region is relatively low, which makes the demand for BBU in western data centers more urgent. At the same time, the project emphasizes green and low-carbon development, requiring that the PUE of data centers be reduced to below 1.5 by 2025, and that the utilization rate of renewable energy increase by 10% annually. These requirements indirectly promote the application of efficient BBU technology.

3. Lithium battery replacement and intelligent management technology upgrade.

Lithium battery replacement of lead-acid batteries is the core technology driver for the growth of the BBU market. Lithium batteries have significant advantages in energy density, cycle life and space utilization. Although the initial cost is higher, the cost of the entire life cycle is lower. Specifically, the energy density of lithium batteries is 3-6 times that of lead-acid batteries, and the cycle life is 1500-3000 times, while lead-acid batteries are only 300-500 times. Within a 5-year service life, the total cost of lithium batteries (2850 yuan) is lower than that of lead-acid batteries (3585 yuan), mainly due to lower maintenance costs and longer service life.

Intelligent management technology provides BBU with higher safety and efficiency. Modern BBU integrates an advanced battery management system (BMS) that can

monitor battery status in real time, optimize the charging and discharging process, and reduce downtime through predictive maintenance. For example, Huasu Technology's BMS battery monitoring system has been applied to ByteDance's computing center. Through the intelligent power management unit (iDMU) branch metering and precise power preparation, it avoids tenant power disputes and saves 40% of battery configuration. At the same time, BMS can also save electricity bills by taking advantage of the difference between peak and valley electricity prices. A company deployed an intelligent management system to realize battery charging during valley electricity price periods and battery discharge during peak electricity price periods, reducing the average electricity bill of the site from 28.6 yuan/day to 23.7 yuan/day, saving 17.1%.

The combination of liquid cooling technology and BBU further enhances its application value in high-density data centers. The immersion liquid-cooled BBU can increase heat dissipation efficiency by 100%, reduce energy consumption in the computer room by 21.6%, extend battery life, and reduce noise pollution. The BBU wind-liquid hybrid heat dissipation commercial pilot completed by Shandong Mobile and ZTE shows that after the computer room renovation, the total energy consumption is reduced by 18.27%, the PUE is reduced by 21.64%, and a single computer room saves more than 6,000 kWh of electricity per year, reducing 4.7 tons of carbon dioxide emissions per year. This technical synergy makes BBU play an increasingly important role in the construction of green data centers.

4. Optimization of policy environment and changes in market structure

The optimization of policy environment provides strong support for the BBU market. China's "Special Action Plan for Green and Low-carbon Development of Data Centers" requires that the average power utilization efficiency of data centers nationwide be reduced to below 1.5 by the end of 2025, and the utilization rate of renewable energy will increase by 10% annually, which will prompt data center operators to adopt more efficient backup power solutions. At the same time, the EU has passed the ErP Lot 6 certification requiring the standby power consumption of power supply equipment to be $\leq 0.1W$, which promotes the use of low-power design for BBU. The Ministry of Finance's server procurement standards also clearly require RAID cards to support BBU units, indicating that government projects have increased the reliability requirements for BBU.

The development of microgrids and virtual power plants provides new application scenarios for BBU. The National Energy Administration issued the "Notice on Several Measures to Promote the Development of Private Economy in the Energy Field", supporting private enterprises to invest in new energy storage, virtual power plants,

smart microgrids and other new energy technologies, new formats and new models. Anhui Province's policies also encourage the creation of innovative application scenarios around virtual power plants, smart microgrids and other directions, and provide policy rewards. These policy supports give BBU a broader development space in distributed energy systems and microgrid applications.

5.Changes in market structure provide new growth opportunities for BBU companies. The traditional BBU market is mainly dominated by Japanese and Korean battery companies such as Samsung and LG, accounting for about 60% of the market share. However, while Chinese companies have reached the level of overseas companies in terms of product quality, their prices are 20% lower, and they are expected to achieve domestic substitution. For example, Weilan Lithium Core has supplied batteries to BBU manufacturers such as AES-KY, Shunda, and Xinshengli, and sent samples to companies such as Delta and Lite-On. It is expected to launch the next generation of BBU batteries in 2025. This change in market structure provides important development opportunities for domestic BBU companies.

6. Development prospects of BBU as a segment of energy storage market

BBU can be regarded as an important segment of energy storage, especially in small or distributed applications that require high reliability and fast response. Compared with traditional UPS, BBU has many advantages, including higher power conversion efficiency, longer service life, and smaller scope of fault impact. BBU adopts a distributed architecture and can be directly embedded in the server cabinet without the need for a dedicated computer room. It has more efficient space utilization and is more suitable for compact AI data centers.

This report is a detailed and comprehensive analysis for global Battery Backup Unit (BBU) Power Supply market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Battery Backup Unit (BBU) Power Supply market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices

(US\$/Unit), 2021-2032

Global Battery Backup Unit (BBU) Power Supply market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Battery Backup Unit (BBU) Power Supply market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Battery Backup Unit (BBU) Power Supply market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Battery Backup Unit (BBU) Power Supply

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Battery Backup Unit (BBU) Power Supply market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AES-KY, Delta Electronics, Dynapack, LITEON Technology, STL Technologies, Sysgration, Panasonic Energy, Advanced Energy, Skeleton, FSP Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Battery Backup Unit (BBU) Power Supply market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations

and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Below 3KW

3-5.5KW

5.5-10KW

Above 10KW

Market segment by Voltage

Lithium-ion Battery

Lead-acid Battery

Others

Market segment by Battery Type

Market segment by Application

Data Center and Telecommunications

Security and Surveillance

Industrial

Medical

Hotel and Retail

Other

Major players covered

AES-KY

Delta Electronics

Dynapack

LITEON Technology

STL Technologies

Sysgration

Panasonic Energy

Advanced Energy

Skeleton

FSP Group

Highpower Technology

Shenzhen Megmeet Electrical

Shenzhen Vapel Power Supply Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Battery Backup Unit (BBU) Power Supply product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Battery Backup Unit (BBU) Power Supply, with price, sales quantity, revenue, and global market share of Battery Backup Unit (BBU) Power Supply from 2021 to 2026.

Chapter 3, the Battery Backup Unit (BBU) Power Supply competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Battery Backup Unit (BBU) Power Supply breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Battery Backup Unit (BBU) Power Supply market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Battery Backup Unit (BBU) Power Supply.

Chapter 14 and 15, to describe Battery Backup Unit (BBU) Power Supply sales channel, distributors, customers, research findings and conclusion.

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