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Global AC Block Energy Storage System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AC Block Energy Storage System market size is expected to reach $ 4931 million by 2032, rising at a market growth of 16.3% CAGR during the forecast period (2026-2032).

An AC Block Energy Storage System is a standardized, modular electrochemical energy storage unit that integrates battery cells or battery modules, a battery management system (BMS), a power conversion system (PCS), thermal management, fire protection and safety systems, DC and AC distribution equipment, and monitoring and communication functions within a common container, cabinet or skid-mounted unit. Multiple AC blocks can be connected in parallel to scale the power and energy capacity of an energy storage installation. The system is generally factory-assembled, wired, configured, commissioned and tested, and provides an AC output interface for connection to a transformer, medium-voltage collection system, electrical load or power grid. Highly integrated configurations may also incorporate a step-up transformer, medium-voltage switchgear and energy management controls within the block or an associated skid.

The market scope covers containerized, cabinet-based and skid-mounted AC block products used in utility-scale and commercial and industrial energy storage applications, including control software supplied with the equipment. It excludes DC blocks without an integrated PCS, separately sold battery cells or modules, standalone PCS equipment, standalone transformers, residential energy storage products, civil construction and complete power-station EPC services.

Key Findings

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LFP batteries represented around 90% of global battery storage deployment in 2025

China accounted for around 60% of global battery storage additions in 2025

Strict AC Block products are concentrated in utility-scale storage and large commercial and industrial projects

Market Trends

AC Block Energy Storage Systems are evolving from basic battery-and-inverter integration toward high-density, software-defined and grid-supporting power blocks. Distributed string or rack-level PCS architectures are increasingly replacing large external centralized converters because independent conversion channels improve fault isolation, availability, state-of-charge control and augmentation flexibility. Liquid-cooled batteries and PCS, silicon-carbide power devices, large-format LFP cells, back-to-back installation, single-side maintenance and factory commissioning are reducing land, cabling and site-work requirements. Commercial products are moving beyond conventional two-hour configurations toward four-hour and longer-duration designs, while some modular platforms now cover two to eight or even twelve hours. Grid-forming control, black start, islanding, reactive power support and weak-grid operation are becoming procurement requirements rather than optional software features. Competition is also shifting from nameplate energy density to usable-energy retention, round-trip efficiency, safety validation, cybersecurity, predictive maintenance and guaranteed lifecycle availability. Plant-level EMS increasingly coordinates fleets of independently controlled AC blocks, allowing capacity augmentation, electricity-market participation and multi-service dispatch without redesigning the complete power station.

Market Dynamics

Drivers

Rapid construction of utility-scale battery projects, higher penetration of variable renewable generation and growing demand for dispatchable capacity are the principal demand drivers. Global battery storage additions reached 108 GW in 2025, approximately 40% above 2024, while utility-scale systems contributed roughly four-fifths of new capacity. Energy shifting has become the dominant project purpose as

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solar-heavy grids require electricity to be transferred from midday to evening peaks. Falling system costs also improve project economics: utility-scale battery project costs declined by approximately 40% in 2024 to around US$150 per kWh, while battery pack prices fell by about 20% in 2024 and a further 8% in 2025. AC Block architecture supports this expansion by reducing external DC engineering, shortening installation and commissioning, standardizing testing and limiting the operational impact of individual PCS or battery-rack faults.

Restraints

AC Block adoption is constrained by grid-connection queues, permitting delays, fire-safety reviews, transformer and switchgear lead times, and differences among national grid codes and certification systems. High integration can reduce site engineering but may increase dependence on a single system platform, spare-parts ecosystem and control interface. Owners must also evaluate whether factory-integrated PCS capacity, transformer ratios and protection settings will remain suitable after battery augmentation or changes in dispatch strategy. Greater enclosure energy density increases thermal propagation and emergency-response concerns, while compact layouts can complicate access and component replacement. In some projects, separately procured DC blocks and PCS remain attractive because they offer wider component choice, easier competitive tendering and greater flexibility to replace batteries or converters independently.

Opportunities

The strongest opportunities lie in standardized utility-scale power blocks for renewable energy shifting, capacity markets, congestion management and grid-forming services. Four-hour and longer-duration projects create demand for scalable designs that can maintain high conversion efficiency across a wider operating range. Additional opportunities are emerging in data centres, semiconductor facilities, charging hubs, mines, islands and industrial microgrids where rapid deployment, black start, backup power and seamless grid-connected or islanded operation have high economic value. Medium-voltage integrated blocks can reduce engineering complexity for repeatable projects, while compact low-voltage cabinets are well suited to commercial and industrial sites. Modular AC architecture also supports phased construction and augmentation, allowing developers to add power and energy in standardized increments as load, renewable capacity or market demand increases.

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Challenges

Suppliers must prove that increasing energy density does not compromise fire separation, explosion protection, cooling reliability or maintenance safety. Grid-forming performance must be validated under weak-grid faults, multiple parallel converters, black-start conditions and transitions between grid-connected and islanded operation. Other challenges include long-term cybersecurity, communication compatibility, accurate state-of-health estimation and coordinated control among battery racks from different production batches. Warranty structures must clearly allocate responsibility for cells, PCS, controls, HVAC, auxiliary consumption and plant-level performance. As hardware prices decline, suppliers also face margin pressure and greater scrutiny of bankability, insurance acceptance, local service capability, degradation guarantees and long-term availability of replacement components.

Industry Chain Analysis

The upstream industry includes LFP cells, modules, battery racks, busbars, contactors, fuses, bidirectional PCS modules, IGBT and SiC power semiconductors, liquid-cooling components, pumps, chillers, fire-detection devices, suppression systems, sensors, transformers, ring-main units, switchgear and industrial communication hardware. LFP has become the dominant chemistry, representing around 90% of battery storage deployment in 2025 because of its cost, cycling and safety characteristics. Midstream suppliers conduct pack assembly, electrical integration, thermal design, enclosure production, control development, protection coordination, software integration and factory acceptance testing. The highest value is created through system-level engineering that converts individual components into a certifiable, grid-compliant and performance-guaranteed AC product. Downstream participants include utilities, independent power producers, renewable developers, EPC contractors, commercial and industrial users, microgrid operators and critical-infrastructure owners. Lifecycle value increasingly comes from EMS software, remote diagnostics, market optimization, augmentation planning, preventive maintenance and long-term service agreements rather than initial equipment delivery alone.

Segment Insights

For market segmentation, grid-side delivery architecture should remain the primary

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classification. Low-Voltage AC Blocks normally output approximately 400–800 Vac and use an external transformer or standardized medium-voltage skid, providing flexibility in transformer selection and site layout. Medium-Voltage Integrated AC Blocks or AC Power Blocks combine the battery and PCS platform with a dedicated transformer, switchgear and protection package, typically delivering at distribution-level voltage and reducing site integration work. PCS architecture should be divided into rack-level or string PCS, cluster-level modular PCS and container-level centralized PCS integrated within the enclosure. “Hybrid PCS AC Block” is not sufficiently standardized as an independent market category and should only be used when a supplier explicitly combines different conversion topologies in one product.

String and modular PCS configurations are becoming the mainstream strict AC Block architecture because they enable independent rack or cluster control, fault isolation and more precise battery utilization. Container-level centralized PCS products can remain within the broader AC-integrated category when the converter is physically included in the factory-built unit; systems using external centralized PCS should instead be treated as complete AC-delivered BESS projects rather than strict AC Block products. Additional segmentation can be conducted by storage duration, comprising up to two hours, more than two to four hours, more than four to eight hours, and more than eight hours, and by physical form, comprising outdoor cabinets, 10-foot modules, 20-foot containers and larger project-specific blocks.

Downstream Market Opportunities

Utility-scale energy shifting and renewable integration represent the largest downstream opportunity, as energy shifting accounted for more than 90% of new battery projects by primary application in 2025 and the average duration of newly commissioned utility-scale systems increased to approximately three hours. Commercial and industrial applications offer additional growth through peak shaving, demand-charge management, backup power, power-quality control and participation in virtual power plants. Data centres and other critical facilities require higher-power systems capable of rapid response, island operation and coordinated operation with generators or renewable power. Microgrids, islands, mines and remote infrastructure favour AC Blocks because factory integration reduces local engineering and commissioning requirements. Charging stations and transport-energy hubs also provide opportunities where storage is used to limit grid-capacity upgrades, buffer high-power charging loads and increase local renewable-energy consumption.

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Regional Insights

China is the largest addressable battery storage market and represented approximately 60% of global battery capacity additions in 2025, with more than 63 GW installed during the year. Its extensive domestic battery, PCS and system-integration supply chain supports rapid product iteration, high energy density and strong price competition. The United States added approximately 19 GW in 2025 and remains an important market for large four-hour projects, domestic-content requirements, safety certification and long-term capacity contracts. Europe added about 6.2 GW, with utility-scale installations more than doubling to approximately 4.6 GW, supporting demand for grid-forming, cybersecurity and locally serviced systems.

Australia added nearly 8 GW of battery storage in 2025, including approximately 4.2 GW of utility-scale systems, while Middle Eastern additions exceeded 3 GW and Chile approached 1 GW. These markets offer strong opportunities for AC Block systems because they combine high renewable penetration, large project sizes, weak-grid or high-temperature operating conditions and pressure for rapid construction. Regional competition will increasingly depend on local certification, grid-model validation, climate adaptation, service networks, project financing and the ability to supply transformers, switchgear and controls alongside the battery block.

Competitive Landscape Analysis

The strict AC Block competitive group includes Sungrow with PowerTitan, Tesla with Megapack, Wärtsilä with Quantum3, Nidec Conversion with ACBOX, Energy Vault with B-VAULT AC, HyperStrong with AC versions of HyperBlock, CLOU Electronics with integrated Aqua products, Narada Power with Center L AC-DC integrated systems, and Kehua Tech with integrated storage and PCS platforms. SolaX Power should be added to the enterprise pool because its ORI utility product integrates a 2.5 MW string PCS and 5.015 MWh battery system in a container, while KSTAR is a relevant additional supplier in the commercial and industrial all-in-one segment. These companies compete through PCS granularity, usable energy, round-trip efficiency, grid-forming performance, safety architecture, factory commissioning, footprint and lifecycle software.

Report Scope

This report studies the global AC Block Energy Storage System production, demand,

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key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AC Block Energy Storage System and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AC Block Energy Storage System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AC Block Energy Storage System total production and demand, 2021-2032, (KWh)

Global AC Block Energy Storage System total production value, 2021-2032, (USD Million)

Global AC Block Energy Storage System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (KWh), (based on production site)

Global AC Block Energy Storage System consumption by region & country, CAGR, 2021-2032 & (KWh)

U.S. VS China: AC Block Energy Storage System domestic production, consumption, key domestic manufacturers and share

Global AC Block Energy Storage System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (KWh)

Global AC Block Energy Storage System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (KWh)

Global AC Block Energy Storage System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (KWh)

This report profiles key players in the global AC Block Energy Storage System market based on the following parameters - company overview, production, value, price, gross

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margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sungrow Power Supply, Tesla, BYD Energy Storage, CRRC Zhuzhou Institute, HyperStrong, Fluence, CATL, Envision Energy, Trina Storage, Canadian Solar e-STORAGE, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AC Block Energy Storage System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (KWh) and average price (US$/KWh) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AC Block Energy Storage System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global AC Block Energy Storage System Market, Segmentation by Type:

Low-Voltage AC Block

Medium-Voltage AC Block

Global AC Block Energy Storage System Market, Segmentation by PCS Architecture:

String PCS AC Block

Centralized PCS AC Block

Hybrid PCS AC Block

Global AC Block Energy Storage System Market, Segmentation by Application:

Utility-Scale Energy Storage

Commercial and Industrial Energy Storage

Microgrid and Off-Grid Power

Critical Power Infrastructure

Others

Companies Profiled:

Sungrow Power Supply

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Tesla

BYD Energy Storage

CRRC Zhuzhou Institute

HyperStrong

Fluence

CATL

Envision Energy

Trina Storage

Canadian Solar e-STORAGE

Wärtsilä

Huawei Digital Power

LG Energy Solution Vertech

CLOU Electronics

Narada Power

Energy Vault

Kehua Tech

Samsung SDI

Nidec Conversion

Hitachi Energy

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Key Questions Answered

1. How big is the global AC Block Energy Storage System market?
2. What is the demand of the global AC Block Energy Storage System market?
3. What is the year over year growth of the global AC Block Energy Storage System market?
4. What is the total value of the global AC Block Energy Storage System market?
5. Who are the Major Players in the global AC Block Energy Storage System market?
6. What are the growth factors driving the market demand?

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