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Global AIDC Computing Power and Energy Storage Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AIDC Computing Power and Energy Storage market size is expected to reach $ 9309 million by 2032, rising at a market growth of 14.6% CAGR during the forecast period (2026-2032).

AIDC Computing Power and Energy Storage refers to integrated energy storage solutions designed for artificial intelligence data centers with high-density computing loads. The market covers energy storage systems that support AI servers, GPU clusters, liquid cooling infrastructure and other critical data center facilities by providing reliable power backup, power quality management, peak load regulation and renewable energy integration. These systems typically consist of battery energy storage systems (BESS), uninterruptible power supply (UPS) storage, battery management systems (BMS), energy management systems (EMS), power conversion systems (PCS), thermal management systems and intelligent control platforms. The research scope focuses on energy storage technologies and solutions applied in AI-oriented data center power infrastructure, emphasizing high power density, rapid response capability, long-duration backup performance and coordinated operation with renewable energy and microgrid systems.

Market Insights

Key Findings

AI data centers are driving demand for high-power-density energy storage systems with millisecond-level response capability

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Lithium-ion battery energy storage remains the dominant technology pathway for AIDC applications

Large-scale AI data centers increasingly adopt MWh-level energy storage configurations

North America represents a leading regional market driven by hyperscale AI infrastructure investment

AIDC energy storage suppliers combine power electronics, battery systems and intelligent energy management capabilities

Market Trends

The AIDC computing power and energy storage market is evolving from traditional backup power solutions toward integrated intelligent energy infrastructure. The rapid expansion of generative AI models, GPU clusters and high-performance computing facilities is increasing data center electricity consumption and creating demand for more flexible and reliable energy management systems. Future solutions will focus on higher energy density batteries, liquid-cooled energy storage systems, intelligent EMS platforms, renewable energy integration and microgrid coordination. The industry is also moving toward modularized energy storage architectures that enable faster deployment and scalable expansion for AI data center campuses.

Market Dynamics

Drivers

The primary growth drivers include rapid AI infrastructure expansion, increasing power consumption per data center rack, limitations in grid capacity expansion and the growing need for stable electricity supply. AI servers equipped with advanced GPUs require significantly higher power availability compared with traditional computing infrastructure, encouraging data center operators to deploy energy storage systems for backup power, peak load management and energy cost optimization. The increasing adoption of renewable energy also creates additional demand for storage solutions that improve power stability and energy utilization efficiency.

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Restraints

Market development is constrained by high initial investment costs, battery degradation concerns, safety management requirements and the complexity of integrating energy storage systems with existing data center power architectures. Large-scale AIDC projects require strict reliability standards, advanced thermal management and comprehensive fire protection systems, increasing system complexity and deployment costs.

Opportunities

Future opportunities are concentrated in AI data center campuses, renewable-powered computing facilities, microgrid-based data centers and next-generation high-density power systems. The integration of artificial intelligence-based energy management software, advanced battery technologies and distributed energy resources will create new value-added opportunities. Suppliers capable of providing complete solutions covering batteries, power electronics, control systems and data center integration are expected to achieve stronger market competitiveness.

Challenges

The industry faces challenges related to technology standardization, supply chain stability, battery material price fluctuations and increasing competition among energy storage providers. In addition, the rapid evolution of AI hardware creates uncertainty regarding future power demand patterns, requiring suppliers to continuously improve system flexibility and scalability.

Industry Chain Analysis

The AIDC computing power and energy storage industry chain consists of upstream energy materials and components, midstream system integration and downstream AI infrastructure applications. The upstream segment includes battery cells, cathode materials, anode materials, electrolytes, power semiconductor components, thermal management components and control hardware. The midstream segment includes battery energy storage manufacturers, UPS suppliers, PCS manufacturers, EMS developers and integrated energy solution providers that combine hardware and software into complete AIDC power solutions. The downstream segment includes

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hyperscale cloud providers, AI computing centers, enterprise data centers and high-performance computing facilities. Value creation is mainly achieved through improvements in energy density, reliability, intelligent control capability and system integration efficiency.Value Chain Analysis

The value chain of AIDC energy storage is increasingly shifting toward integrated solutions combining battery technology, power conversion, energy management software and data center operational optimization. Companies with strong capabilities in battery manufacturing, power electronics, digital energy platforms and large-scale project deployment are positioned to capture higher-value segments. The future competitive advantage will depend on comprehensive solution capability rather than individual hardware supply.

Segment Insights

Lithium-ion battery energy storage currently represents the largest technology segment due to its mature supply chain, high energy density, long cycle life and strong commercial availability. Within lithium-ion solutions, lithium iron phosphate-based systems are increasingly preferred for large-scale data center applications because of their safety characteristics and lifecycle advantages. In terms of system scale, medium-scale and large-scale energy storage systems represent important growth areas as AI data centers require increasingly higher backup capacity and power management capability. Application demand is gradually expanding from traditional backup energy storage toward peak shaving, renewable energy coordination and intelligent energy optimization.

Downstream Market Opportunities

The downstream opportunity landscape is centered on AI data centers, cloud computing facilities, enterprise computing infrastructure and emerging AI industrial parks. Large-scale AI training clusters require stable and continuous power supply, creating demand for advanced storage systems that improve resilience and reduce operational costs. Future adoption will increasingly focus on integrated solutions combining energy storage, renewable power generation, intelligent monitoring and automated energy management.

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Regional Insights

North America is one of the leading regional markets due to strong investment in AI infrastructure, hyperscale cloud computing expansion and advanced data center development. The region demonstrates strong demand for high-reliability energy storage solutions integrated with advanced power management systems. Asia-Pacific is experiencing rapid growth driven by AI infrastructure expansion, semiconductor ecosystem development and increasing data center construction. China represents a significant growth market supported by domestic AI development, renewable energy deployment and energy storage manufacturing capabilities. Europe is focusing on sustainable data center development and renewable energy integration, creating additional opportunities for advanced energy storage systems.

Competitive Landscape Analysis

The competitive landscape includes data center power infrastructure companies, battery energy storage manufacturers, renewable energy solution providers and digital energy technology companies. Leading participants compete through technological capabilities, system reliability, global deployment experience and integrated solution offerings. Data center power specialists focus on UPS, power management and infrastructure integration, while battery and energy storage companies leverage manufacturing scale and battery technology advantages. Future competition will increasingly center on intelligent energy management, high-density storage technologies and the ability to provide complete AIDC energy infrastructure solutions.

Report Scope

This report studies the global AIDC Computing Power and Energy Storage demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for AIDC Computing Power and Energy Storage, 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 AIDC Computing Power and Energy Storage that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global AIDC Computing Power and Energy Storage total market, 2021-2032, (USD Million)

Global AIDC Computing Power and Energy Storage total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: AIDC Computing Power and Energy Storage total market, key domestic companies, and share, (USD Million)

Global AIDC Computing Power and Energy Storage revenue by player, revenue and market share 2021-2026, (USD Million)

Global AIDC Computing Power and Energy Storage total market by Type, CAGR, 2021-2032, (USD Million)

Global AIDC Computing Power and Energy Storage total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global AIDC Computing Power and Energy Storage market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Vertiv, Schneider Electric, Tesla, Eaton, Fluence, ABB, Delta Electronics, Sunwoda, Huawei, CATL, 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 AIDC Computing Power and Energy Storage market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$

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Millions), by player, by regions, 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 AIDC Computing Power and Energy Storage Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global AIDC Computing Power and Energy Storage Market, Segmentation by Type:

Lithium-Ion Battery Energy Storage

Sodium-Ion Battery Energy Storage

Flow Battery Energy Storage

Global AIDC Computing Power and Energy Storage Market,

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Segmentation by System Scale:

Small-Scale Energy Storage (<1 MWh)

Medium-Scale Energy Storage (1–20 MWh)

Large-Scale Energy Storage (20–100 MWh)

Ultra-Large-Scale Energy Storage (>100 MWh)

Global AIDC Computing Power and Energy Storage Market, Segmentation by Application:

Backup Energy Storage

Peak Shaving And Valley Filling

Others

Companies Profiled:

Vertiv

Schneider Electric

Tesla

Eaton

Fluence

ABB

Delta Electronics

Sunwoda

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Huawei

CATL

Sungrow

SVOLT

HiTHIUM

Key Questions Answered

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

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Contents

1 SUPPLY SUMMARY

1.1 AIDC Computing Power and Energy Storage Introduction
1.2 World AIDC Computing Power and Energy Storage Market Size & Forecast (2021 & 2025 & 2032)
1.3 World AIDC Computing Power and Energy Storage Total Market by Region (by Headquarter Location)
  1.3.1 World AIDC Computing Power and Energy Storage Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.3 China Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.4 Europe Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.5 Japan Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.6 South Korea Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.7 ASEAN Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
  1.3.8 India Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 AIDC Computing Power and Energy Storage Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.2 World AIDC Computing Power and Energy Storage Consumption Value by Region
  2.2.1 World AIDC Computing Power and Energy Storage Consumption Value by Region (2021-2026)
  2.2.2 World AIDC Computing Power and Energy Storage Consumption Value Forecast by Region (2027-2032)

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2.3 United States AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.4 China AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.5 Europe AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.6 Japan AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.7 South Korea AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.8 ASEAN AIDC Computing Power and Energy Storage Consumption Value (2021-2032)
2.9 India AIDC Computing Power and Energy Storage Consumption Value (2021-2032)

3 WORLD AIDC COMPUTING POWER AND ENERGY STORAGE COMPANIES COMPETITIVE ANALYSIS

3.1 World AIDC Computing Power and Energy Storage Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global AIDC Computing Power and Energy Storage Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for AIDC Computing Power and Energy Storage in 2025
  3.2.3 Global Concentration Ratios (CR8) for AIDC Computing Power and Energy Storage in 2025
3.3 AIDC Computing Power and Energy Storage Company Evaluation Quadrant
3.4 AIDC Computing Power and Energy Storage Market: Overall Company Footprint Analysis
  3.4.1 AIDC Computing Power and Energy Storage Market: Region Footprint
  3.4.2 AIDC Computing Power and Energy Storage Market: Company Product Type Footprint
  3.4.3 AIDC Computing Power and Energy Storage Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

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info@marketpublishers.com

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: AIDC Computing Power and Energy Storage Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: AIDC Computing Power and Energy Storage Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: AIDC Computing Power and Energy Storage Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: AIDC Computing Power and Energy Storage Consumption Value Comparison
  4.2.1 United States VS China: AIDC Computing Power and Energy Storage Consumption Value Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: AIDC Computing Power and Energy Storage Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based AIDC Computing Power and Energy Storage Companies and Market Share, 2021-2026
  4.3.1 United States Based AIDC Computing Power and Energy Storage Companies, Headquarters (States, Country)
  4.3.2 United States Based Companies AIDC Computing Power and Energy Storage Revenue, (2021-2026)
4.4 China Based Companies AIDC Computing Power and Energy Storage Revenue and Market Share, 2021-2026
  4.4.1 China Based AIDC Computing Power and Energy Storage Companies, Company Headquarters (Province, Country)
  4.4.2 China Based Companies AIDC Computing Power and Energy Storage Revenue, (2021-2026)
4.5 Rest of World Based AIDC Computing Power and Energy Storage Companies and Market Share, 2021-2026
  4.5.1 Rest of World Based AIDC Computing Power and Energy Storage Companies, Headquarters (Province, Country)
  4.5.2 Rest of World Based Companies AIDC Computing Power and Energy Storage Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World AIDC Computing Power and Energy Storage Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type

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5.2.1 Lithium-Ion Battery Energy Storage
5.2.2 Sodium-Ion Battery Energy Storage
5.2.3 Flow Battery Energy Storage
5.3 Market Segment by Type
5.3.1 World AIDC Computing Power and Energy Storage Market Size by Type (2021-2026)
5.3.2 World AIDC Computing Power and Energy Storage Market Size by Type (2027-2032)
5.3.3 World AIDC Computing Power and Energy Storage Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY SYSTEM SCALE

6.1 World AIDC Computing Power and Energy Storage Market Size Overview by System Scale: 2021 VS 2025 VS 2032
6.2 Segment Introduction by System Scale
6.2.1 Small-Scale Energy Storage (<1 MWh)
6.2.2 Medium-Scale Energy Storage (1–20 MWh)
6.2.3 Large-Scale Energy Storage (20–100 MWh)
6.2.4 Ultra-Large-Scale Energy Storage (>100 MWh)
6.3 Market Segment by System Scale
6.3.1 World AIDC Computing Power and Energy Storage Market Size by System Scale (2021-2026)
6.3.2 World AIDC Computing Power and Energy Storage Market Size by System Scale (2027-2032)
6.3.3 World AIDC Computing Power and Energy Storage Market Size Market Share by System Scale (2027-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World AIDC Computing Power and Energy Storage Market Size Overview by Application: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Application
7.2.1 Backup Energy Storage
7.2.2 Peak Shaving And Valley Filling
7.2.3 Others
7.3 Market Segment by Application
7.3.1 World AIDC Computing Power and Energy Storage Market Size by Application (2021-2026)

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7.3.2 World AIDC Computing Power and Energy Storage Market Size by Application (2027-2032)
7.3.3 World AIDC Computing Power and Energy Storage Market Size Market Share by Application (2021-2032)

8 COMPANY PROFILES

8.1 Vertiv
8.1.1 Vertiv Details
8.1.2 Vertiv Major Business
8.1.3 Vertiv AIDC Computing Power and Energy Storage Product and Services
8.1.4 Vertiv AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.1.5 Vertiv Recent Developments/Updates
8.1.6 Vertiv Competitive Strengths & Weaknesses
8.2 Schneider Electric
8.2.1 Schneider Electric Details
8.2.2 Schneider Electric Major Business
8.2.3 Schneider Electric AIDC Computing Power and Energy Storage Product and Services
8.2.4 Schneider Electric AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.2.5 Schneider Electric Recent Developments/Updates
8.2.6 Schneider Electric Competitive Strengths & Weaknesses
8.3 Tesla
8.3.1 Tesla Details
8.3.2 Tesla Major Business
8.3.3 Tesla AIDC Computing Power and Energy Storage Product and Services
8.3.4 Tesla AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.3.5 Tesla Recent Developments/Updates
8.3.6 Tesla Competitive Strengths & Weaknesses
8.4 Eaton
8.4.1 Eaton Details
8.4.2 Eaton Major Business
8.4.3 Eaton AIDC Computing Power and Energy Storage Product and Services
8.4.4 Eaton AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.4.5 Eaton Recent Developments/Updates

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8.4.6 Eaton Competitive Strengths & Weaknesses
8.5 Fluence
8.5.1 Fluence Details
8.5.2 Fluence Major Business
8.5.3 Fluence AIDC Computing Power and Energy Storage Product and Services
8.5.4 Fluence AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.5.5 Fluence Recent Developments/Updates
8.5.6 Fluence Competitive Strengths & Weaknesses
8.6 ABB
8.6.1 ABB Details
8.6.2 ABB Major Business
8.6.3 ABB AIDC Computing Power and Energy Storage Product and Services
8.6.4 ABB AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.6.5 ABB Recent Developments/Updates
8.6.6 ABB Competitive Strengths & Weaknesses
8.7 Delta Electronics
8.7.1 Delta Electronics Details
8.7.2 Delta Electronics Major Business
8.7.3 Delta Electronics AIDC Computing Power and Energy Storage Product and Services
8.7.4 Delta Electronics AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.7.5 Delta Electronics Recent Developments/Updates
8.7.6 Delta Electronics Competitive Strengths & Weaknesses
8.8 Sunwoda
8.8.1 Sunwoda Details
8.8.2 Sunwoda Major Business
8.8.3 Sunwoda AIDC Computing Power and Energy Storage Product and Services
8.8.4 Sunwoda AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.8.5 Sunwoda Recent Developments/Updates
8.8.6 Sunwoda Competitive Strengths & Weaknesses
8.9 Huawei
8.9.1 Huawei Details
8.9.2 Huawei Major Business
8.9.3 Huawei AIDC Computing Power and Energy Storage Product and Services
8.9.4 Huawei AIDC Computing Power and Energy Storage Revenue, Gross Margin

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and Market Share (2021-2026)
8.9.5 Huawei Recent Developments/Updates
8.9.6 Huawei Competitive Strengths & Weaknesses
8.10 CATL
8.10.1 CATL Details
8.10.2 CATL Major Business
8.10.3 CATL AIDC Computing Power and Energy Storage Product and Services
8.10.4 CATL AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.10.5 CATL Recent Developments/Updates
8.10.6 CATL Competitive Strengths & Weaknesses
8.11 Sungrow
8.11.1 Sungrow Details
8.11.2 Sungrow Major Business
8.11.3 Sungrow AIDC Computing Power and Energy Storage Product and Services
8.11.4 Sungrow AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.11.5 Sungrow Recent Developments/Updates
8.11.6 Sungrow Competitive Strengths & Weaknesses
8.12 SVOLT
8.12.1 SVOLT Details
8.12.2 SVOLT Major Business
8.12.3 SVOLT AIDC Computing Power and Energy Storage Product and Services
8.12.4 SVOLT AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.12.5 SVOLT Recent Developments/Updates
8.12.6 SVOLT Competitive Strengths & Weaknesses
8.13 HiTHIUM
8.13.1 HiTHIUM Details
8.13.2 HiTHIUM Major Business
8.13.3 HiTHIUM AIDC Computing Power and Energy Storage Product and Services
8.13.4 HiTHIUM AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026)
8.13.5 HiTHIUM Recent Developments/Updates
8.13.6 HiTHIUM Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 AIDC Computing Power and Energy Storage Industry Chain

+357 96 030922
info@marketpublishers.com

9.2 AIDC Computing Power and Energy Storage Upstream Analysis
9.3 AIDC Computing Power and Energy Storage Midstream Analysis
9.4 AIDC Computing Power and Energy Storage Downstream Analysis

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology
11.2 Research Process and Data Source
11.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World AIDC Computing Power and Energy Storage Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World AIDC Computing Power and Energy Storage Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World AIDC Computing Power and Energy Storage Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World AIDC Computing Power and Energy Storage Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World AIDC Computing Power and Energy Storage Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World AIDC Computing Power and Energy Storage Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World AIDC Computing Power and Energy Storage Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World AIDC Computing Power and Energy Storage Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World AIDC Computing Power and Energy Storage Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key AIDC Computing Power and Energy Storage Players in 2025
Table 12. World AIDC Computing Power and Energy Storage Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global AIDC Computing Power and Energy Storage Company Evaluation Quadrant
Table 14. Head Office of Key AIDC Computing Power and Energy Storage Players
Table 15. AIDC Computing Power and Energy Storage Market: Company Product Type Footprint
Table 16. AIDC Computing Power and Energy Storage Market: Company Product Application Footprint
Table 17. AIDC Computing Power and Energy Storage Mergers & Acquisitions Activity
Table 18. United States VS China AIDC Computing Power and Energy Storage Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China AIDC Computing Power and Energy Storage Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

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info@marketpublishers.com

Table 20. United States Based AIDC Computing Power and Energy Storage Companies, Headquarters (States, Country)
Table 21. United States Based Companies AIDC Computing Power and Energy Storage Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies AIDC Computing Power and Energy Storage Revenue Market Share (2021-2026)
Table 23. China Based AIDC Computing Power and Energy Storage Companies, Headquarters (Province, Country)
Table 24. China Based Companies AIDC Computing Power and Energy Storage Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies AIDC Computing Power and Energy Storage Revenue Market Share (2021-2026)
Table 26. Rest of World Based AIDC Computing Power and Energy Storage Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies AIDC Computing Power and Energy Storage Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies AIDC Computing Power and Energy Storage Revenue Market Share (2021-2026)
Table 29. World AIDC Computing Power and Energy Storage Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World AIDC Computing Power and Energy Storage Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World AIDC Computing Power and Energy Storage Market Size by Type (2027-2032) & (USD Million)
Table 32. World AIDC Computing Power and Energy Storage Market Size by System Scale, (USD Million), 2021 & 2025 & 2032
Table 33. World AIDC Computing Power and Energy Storage Market Size Value by System Scale (2021-2026) & (USD Million)
Table 34. World AIDC Computing Power and Energy Storage Market Size by System Scale (2027-2032) & (USD Million)
Table 35. World AIDC Computing Power and Energy Storage Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 36. World AIDC Computing Power and Energy Storage Market Size by Application (2021-2026) & (USD Million)
Table 37. World AIDC Computing Power and Energy Storage Market Size by Application (2027-2032) & (USD Million)
Table 38. Vertiv Basic Information, Manufacturing Base and Competitors
Table 39. Vertiv Major Business
Table 40. Vertiv AIDC Computing Power and Energy Storage Product and Services

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info@marketpublishers.com

Table 41. Vertiv AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 42. Vertiv Recent Developments/Updates
Table 43. Vertiv Competitive Strengths & Weaknesses
Table 44. Schneider Electric Basic Information, Manufacturing Base and Competitors
Table 45. Schneider Electric Major Business
Table 46. Schneider Electric AIDC Computing Power and Energy Storage Product and Services
Table 47. Schneider Electric AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 48. Schneider Electric Recent Developments/Updates
Table 49. Schneider Electric Competitive Strengths & Weaknesses
Table 50. Tesla Basic Information, Manufacturing Base and Competitors
Table 51. Tesla Major Business
Table 52. Tesla AIDC Computing Power and Energy Storage Product and Services
Table 53. Tesla AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 54. Tesla Recent Developments/Updates
Table 55. Tesla Competitive Strengths & Weaknesses
Table 56. Eaton Basic Information, Manufacturing Base and Competitors
Table 57. Eaton Major Business
Table 58. Eaton AIDC Computing Power and Energy Storage Product and Services
Table 59. Eaton AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 60. Eaton Recent Developments/Updates
Table 61. Eaton Competitive Strengths & Weaknesses
Table 62. Fluence Basic Information, Manufacturing Base and Competitors
Table 63. Fluence Major Business
Table 64. Fluence AIDC Computing Power and Energy Storage Product and Services
Table 65. Fluence AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 66. Fluence Recent Developments/Updates
Table 67. Fluence Competitive Strengths & Weaknesses
Table 68. ABB Basic Information, Manufacturing Base and Competitors
Table 69. ABB Major Business
Table 70. ABB AIDC Computing Power and Energy Storage Product and Services
Table 71. ABB AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 72. ABB Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

Table 73. ABB Competitive Strengths & Weaknesses
Table 74. Delta Electronics Basic Information, Manufacturing Base and Competitors
Table 75. Delta Electronics Major Business
Table 76. Delta Electronics AIDC Computing Power and Energy Storage Product and Services
Table 77. Delta Electronics AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 78. Delta Electronics Recent Developments/Updates
Table 79. Delta Electronics Competitive Strengths & Weaknesses
Table 80. Sunwoda Basic Information, Manufacturing Base and Competitors
Table 81. Sunwoda Major Business
Table 82. Sunwoda AIDC Computing Power and Energy Storage Product and Services
Table 83. Sunwoda AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 84. Sunwoda Recent Developments/Updates
Table 85. Sunwoda Competitive Strengths & Weaknesses
Table 86. Huawei Basic Information, Manufacturing Base and Competitors
Table 87. Huawei Major Business
Table 88. Huawei AIDC Computing Power and Energy Storage Product and Services
Table 89. Huawei AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 90. Huawei Recent Developments/Updates
Table 91. Huawei Competitive Strengths & Weaknesses
Table 92. CATL Basic Information, Manufacturing Base and Competitors
Table 93. CATL Major Business
Table 94. CATL AIDC Computing Power and Energy Storage Product and Services
Table 95. CATL AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 96. CATL Recent Developments/Updates
Table 97. CATL Competitive Strengths & Weaknesses
Table 98. Sungrow Basic Information, Manufacturing Base and Competitors
Table 99. Sungrow Major Business
Table 100. Sungrow AIDC Computing Power and Energy Storage Product and Services
Table 101. Sungrow AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 102. Sungrow Recent Developments/Updates
Table 103. Sungrow Competitive Strengths & Weaknesses
Table 104. SVOLT Basic Information, Manufacturing Base and Competitors
Table 105. SVOLT Major Business

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Table 106. SVOLT AIDC Computing Power and Energy Storage Product and Services
Table 107. SVOLT AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 108. SVOLT Recent Developments/Updates
Table 109. SVOLT Competitive Strengths & Weaknesses
Table 110. HiTHIUM Basic Information, Manufacturing Base and Competitors
Table 111. HiTHIUM Major Business
Table 112. HiTHIUM AIDC Computing Power and Energy Storage Product and Services
Table 113. HiTHIUM AIDC Computing Power and Energy Storage Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 114. HiTHIUM Recent Developments/Updates
Table 115. HiTHIUM Competitive Strengths & Weaknesses
Table 116. Global Key Players of AIDC Computing Power and Energy Storage Upstream (Raw Materials)
Table 117. Global AIDC Computing Power and Energy Storage Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. AIDC Computing Power and Energy Storage Picture
Figure 2. World AIDC Computing Power and Energy Storage Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World AIDC Computing Power and Energy Storage Total Revenue (2021-2032) & (USD Million)
Figure 4. World AIDC Computing Power and Energy Storage Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World AIDC Computing Power and Energy Storage Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company AIDC Computing Power and Energy Storage Revenue (2021-2032) & (USD Million)
Figure 13. AIDC Computing Power and Energy Storage Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 16. World AIDC Computing Power and Energy Storage Consumption Value Market Share by Region (2021-2032)
Figure 17. United States AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 18. China AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 23. India AIDC Computing Power and Energy Storage Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of AIDC Computing Power and Energy Storage by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for AIDC Computing Power and Energy Storage Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for AIDC Computing Power and Energy Storage Markets in 2025
Figure 27. United States VS China: AIDC Computing Power and Energy Storage Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: AIDC Computing Power and Energy Storage Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World AIDC Computing Power and Energy Storage Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World AIDC Computing Power and Energy Storage Market Size Market Share by Type in 2025
Figure 31. Lithium-Ion Battery Energy Storage
Figure 32. Sodium-Ion Battery Energy Storage
Figure 33. Flow Battery Energy Storage
Figure 34. World AIDC Computing Power and Energy Storage Market Size Market Share by Type (2021-2032)
Figure 35. World AIDC Computing Power and Energy Storage Market Size by System Scale, (USD Million), 2021 & 2025 & 2032
Figure 36. World AIDC Computing Power and Energy Storage Market Size Market Share by System Scale in 2025
Figure 37. Small-Scale Energy Storage (<1 MWh)
Figure 38. Medium-Scale Energy Storage (1–20 MWh)
Figure 39. Large-Scale Energy Storage (20–100 MWh)
Figure 40. Ultra-Large-Scale Energy Storage (>100 MWh)
Figure 41. World AIDC Computing Power and Energy Storage Market Size Market Share by System Scale (2021-2032)
Figure 42. World AIDC Computing Power and Energy Storage Market Size by Application, (USD Million), 2021 & 2025 & 2032

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Figure 43. World AIDC Computing Power and Energy Storage Market Size Market Share by Application in 2025
Figure 44. Backup Energy Storage
Figure 45. Peak Shaving And Valley Filling
Figure 46. Others
Figure 47. World AIDC Computing Power and Energy Storage Market Size Market Share by Application (2021-2032)
Figure 48. AIDC Computing Power and Energy Storage Industrial Chain
Figure 49. Methodology
Figure 50. Research Process and Data Source

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