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Global Air-cooled Energy Storage System (ESS) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Air-cooled Energy Storage System (ESS) market size is expected to reach $ 12001 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

In 2025, global Air-cooled Energy Storage System (ESS) production reached approximately 130,245 MWh. The average price is about 60 USD/kWh. Air-cooled Energy Storage System (ESS) is a type of energy storage system that uses air as the primary cooling medium to manage the heat generated by batteries and other electrical components during charging and discharging. The system typically uses air conditioners, fans, ventilation equipment, and air ducts to circulate cooled air around battery cells, modules, or racks and maintain their operating temperature within a suitable range.

The Air-cooled Energy Storage System (ESS) market is supported by the continued expansion of renewable energy, rising demand for grid flexibility, growing commercial and industrial energy management needs, and wider deployment of battery storage in distributed energy, microgrids, backup power, and selected utility-scale applications. Air-cooled ESS uses air as the primary thermal management medium and typically relies on air conditioners, fans, ventilation equipment, and air ducts to control the temperature of battery cells, modules, and electrical components during charging and discharging. Compared with liquid-cooled systems, air-cooled ESS generally offers a simpler structure, lower initial thermal-management cost, easier maintenance, and relatively mature technology, making it suitable for applications where energy density, cooling intensity, and space constraints are less demanding. The upstream industry chain mainly includes battery cells, battery modules, battery management systems (BMS), power conversion systems (PCS), energy management systems (EMS), air-conditioning

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units, fans, ducts, temperature sensors, fire protection equipment, electrical components, thermal insulation materials, structural parts, and related control electronics. Battery cells represent a major share of system cost and have a significant influence on safety, cycle life, energy density, and overall system economics. The midstream segment mainly consists of battery pack manufacturers, thermal management equipment suppliers, ESS manufacturers, and system integrators that combine battery racks or cabinets, air-cooling equipment, BMS, PCS, EMS, fire protection, electrical distribution, communication, and monitoring systems into complete storage solutions in cabinet-type, rack-type, room-type, or containerized configurations. System integrators must optimize airflow organization, battery arrangement, ventilation efficiency, temperature uniformity, electrical architecture, safety protection, and intelligent control to ensure stable performance under different ambient and operating conditions. The downstream market covers commercial and industrial energy storage, distributed energy systems, microgrids, renewable energy integration, telecom and infrastructure backup power, data centers, power generation-side storage, grid-side storage, and other applications requiring flexible energy management. In the future, the Air-cooled ESS market is expected to remain important in cost-sensitive, medium-density, and moderate-capacity applications, although liquid cooling is gaining share in high-capacity and high-energy-density projects. Future development will focus on improving airflow design, reducing battery temperature differences, increasing cooling efficiency, lowering auxiliary power consumption, enhancing intelligent temperature control, strengthening thermal runaway detection and fire protection, and reducing maintenance requirements. The adoption of high-efficiency air conditioners, variable-speed fans, advanced insulation materials, intelligent BMS algorithms, modular system designs, and predictive maintenance technologies is expected to improve system reliability and life-cycle economics. While the increasing use of larger battery cells and higher-capacity energy storage systems may gradually reduce the competitiveness of conventional air cooling in some large utility-scale projects, Air-cooled Energy Storage Systems are expected to continue serving a meaningful market in commercial and industrial, distributed, backup power, microgrid, and other cost-sensitive energy storage applications worldwide.

Report Scope

This report studies the global Air-cooled Energy Storage System (ESS) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air-cooled

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Energy Storage System (ESS) 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 Air-cooled Energy Storage System (ESS) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air-cooled Energy Storage System (ESS) total production and demand, 2021-2032, (MWh)

Global Air-cooled Energy Storage System (ESS) total production value, 2021-2032, (USD Million)

Global Air-cooled Energy Storage System (ESS) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MWh), (based on production site)

Global Air-cooled Energy Storage System (ESS) consumption by region & country, CAGR, 2021-2032 & (MWh)

U.S. VS China: Air-cooled Energy Storage System (ESS) domestic production, consumption, key domestic manufacturers and share

Global Air-cooled Energy Storage System (ESS) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MWh)

Global Air-cooled Energy Storage System (ESS) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MWh)

Global Air-cooled Energy Storage System (ESS) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MWh)

This report profiles key players in the global Air-cooled Energy Storage System (ESS) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include CATL, BYD, EVE, LG, Samsung SDI, CALB, Gotion, Great Power, Narada, Pylon Technologies, etc.

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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 Air-cooled Energy Storage System (ESS) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (MWh) 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 Air-cooled Energy Storage System (ESS) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Air-cooled Energy Storage System (ESS) Market,

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Segmentation by Type:

Lithium

Lead Acid

NaS

Other

Global Air-cooled Energy Storage System (ESS) Market, Segmentation by Energy Capacity:

Less Than 10 MWh

10-100 MWh

More Than 100 MWh

Global Air-cooled Energy Storage System (ESS) Market, Segmentation by Energy Source:

Solar Energy Storage

Wind Energy Storage

Other

Global Air-cooled Energy Storage System (ESS) Market, Segmentation by Application:

Behind-the-meter

Utility-scale

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Companies Profiled:

CATL

BYD

EVE

LG

Samsung SDI

CALB

Gotion

Great Power

Narada

Pylon Technologies

Key Questions Answered

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

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