

Global Battery Energy Storage Systems and Energy Storage EPC Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Battery Energy Storage Systems and Energy Storage EPC Services market size is expected to reach \$ 144098 million by 2032, rising at a market growth of 11.6% CAGR during the forecast period (2026-2032).

Battery Energy Storage Systems and Energy Storage EPC Services refer to stationary electrochemical storage systems and turnkey project delivery activities designed for grid flexibility, renewable integration, commercial and industrial energy management, and reliable power supply for large loads. A typical BESS integrates battery racks or containers, power conversion systems, battery management systems, energy management systems, thermal management, fire protection, safety monitoring, medium-voltage interconnection equipment and system-level controls. Energy storage EPC covers engineering design, equipment procurement, civil works, electrical installation, grid connection, commissioning, performance testing and long-term service arrangements. This research focuses on real system suppliers, system integrators and EPC contractors with demonstrable product or project delivery capability.

Based on our research, the BESS and energy storage EPC market has moved from pilot-scale battery deployment to a mainstream power infrastructure delivery market. In 2025, global battery storage additions reached a new record, with utility-scale systems accounting for the majority of new installations. The average duration of commissioned projects is also increasing, which shifts competition from pure battery cost to system-level safety, thermal management, fire protection, grid-forming capability, EMS optimization, commissioning quality and long-term performance guarantees. China, the United States and Europe remain the anchor markets, but Australia, the Middle East and selected Latin American markets are becoming increasingly relevant as battery

storage turns into a practical solution for renewable integration and system flexibility.

From the demand perspective, the market is shifting from renewable co-location mandates and frequency regulation toward energy shifting, capacity value, grid congestion management, C&I energy cost optimization and power reliability for large loads. This change favors suppliers that can deliver higher-duration systems, stronger safety design, bankable warranties, localized supply chains and grid-compliant engineering. Europe is structurally moving from residential-dominated growth toward large-scale and C&I storage, while the United States is expanding through utility-scale battery installations and China continues to dominate both manufacturing and deployment.

From a technology-route perspective, LFP-based lithium-ion BESS remains the dominant platform for the current decade, supported by scale, cost, supply-chain depth and improving safety design. Liquid cooling, 5MWh-plus containers, AC-block architecture, string PCS, grid-forming controls, large-format storage cells and verified fire-safety testing are becoming mainstream product directions. Non-lithium technologies, including vanadium flow, zinc-based batteries, sodium-ion and iron-air batteries, are strategically important for long-duration applications, but their near-term market share will likely remain concentrated in specific use cases where duration, safety, temperature tolerance or supply-chain diversification outweigh pure system cost.

This report studies the global Battery Energy Storage Systems and Energy Storage EPC Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Battery Energy Storage Systems and Energy Storage EPC Services, 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 Battery Energy Storage Systems and Energy Storage EPC Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Battery Energy Storage Systems and Energy Storage EPC Services total market, 2021-2032, (USD Million)

Global Battery Energy Storage Systems and Energy Storage EPC Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Battery Energy Storage Systems and Energy Storage EPC Services

total market, key domestic companies, and share, (USD Million)

Global Battery Energy Storage Systems and Energy Storage EPC Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Battery Energy Storage Systems and Energy Storage EPC Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Battery Energy Storage Systems and Energy Storage EPC Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Battery Energy Storage Systems and Energy Storage EPC Services 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 POWERCHINA, China Energy Engineering Corporation, VINCI SA, Bouygues SA, Quanta Services, Inc., MasTec, Inc., Bechtel Group, Inc., Kiewit Corporation, M. A. Mortenson Company, SOLV Energy, Inc., 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 Battery Energy Storage Systems and Energy Storage EPC Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ 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 Battery Energy Storage Systems and Energy Storage EPC Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Battery Energy Storage Systems and Energy Storage EPC Services Market,
Segmentation by Type:

Containerized BESS

Cabinet-type ESS

Other ESS Products

Global Battery Energy Storage Systems and Energy Storage EPC Services Market,
Segmentation by Technology Route:

LFP Lithium-ion BESS

NMC Lithium-ion BESS

Sodium-ion BESS

Flow Battery ESS

Zinc-based ESS

Other Electrochemical ESS

Global Battery Energy Storage Systems and Energy Storage EPC Services Market,
Segmentation by Cooling Method:

Air-cooled ESS

Liquid-cooled ESS

Other

Global Battery Energy Storage Systems and Energy Storage EPC Services Market,
Segmentation by Discharge Duration:

Short-duration ESS

1?2 Hour ESS

2?4 Hour ESS

4?8 Hour ESS

8+ Hour Long-duration ESS

Global Battery Energy Storage Systems and Energy Storage EPC Services Market,
Segmentation by Application:

Grid

Data Center & Critical Loads

EV Charging & Transportation

Public & Emergency Infrastructure

Other

Companies Profiled:

POWERCHINA

China Energy Engineering Corporation

VINCI SA

Bouygues SA

Quanta Services, Inc.

MasTec, Inc.

Bechtel Group, Inc.

Kiewit Corporation

M. A. Mortenson Company

SOLV Energy, Inc.

McCarthy Building Companies, Inc.

Burns & McDonnell

Black & Veatch

Renewable Energy Systems Ltd.

Ameresco, Inc.

SPIE SA

Eiffage SA

AECOM

Jacobs Solutions Inc.

Stantec Inc.

Key Questions Answered

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

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