

Global BESS for AIDC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global BESS for AIDC market size is expected to reach \$ 3199 million by 2032, rising at a market growth of 19.2% CAGR during the forecast period (2026-2032).

BESS for AIDC are system-level electrochemical energy storage assets deployed at AI data centers, high-performance computing facilities, and their associated on-site energy infrastructure to store, convert, control, and dispatch electrical energy in response to facility and grid conditions. A typical system integrates battery cells and modules, racks or containerized battery enclosures, battery management systems (BMS), bidirectional power conversion systems (PCS), energy management systems (EMS), thermal management, fire protection, electrical protection, and supervisory controls. These systems may be delivered in containerized, cabinet-based, modular, or site-integrated configurations and can range from megawatt-scale installations to large campus-level systems. Depending on the site architecture, they can operate through AC-coupled, DC-coupled, grid-following, grid-forming, behind-the-meter, or microgrid configurations and coordinate with the utility grid, on-site generation, renewable power, UPS infrastructure, and data center electrical distribution systems.

Based on our research, Battery Energy Storage Systems for AI Data Centers remain an emerging application segment that has entered the early stage of scaled commercial expansion. Their growth logic differs materially from that of conventional UPS backup power systems used in data centers. AI training and inference workloads are characterized by high power density, rapid ramp rates, and substantial load volatility. At the same time, major computing clusters in North America, China, and Europe are facing longer grid interconnection timelines, tighter power capacity, and increasing requirements for renewable energy integration. As a result, the economic role of BESS is expanding beyond backup power toward peak shaving, load smoothing, grid support,

grid-forming operation, demand response, and broader on-site energy coordination.

The current competitive landscape is concentrated primarily in China, North America, and Europe, although the industrial structures of these three regions differ significantly. China has developed a relatively complete value chain covering battery cells, PCS, BMS, EMS, integrated BESS, and critical power infrastructure for data centers. Traditional energy storage companies, data center backup power suppliers, and power electronics vendors are all accelerating their entry into the AIDC market.

From a product and technology perspective, AI data center energy storage is increasingly moving toward a multi-duration and multi-technology architecture. LFP remains the mainstream chemistry for facility-scale BESS, supported by its mature supply chain, cycle life, safety performance, and cost competitiveness, and it is particularly well suited to 2–4 hour storage applications. However, millisecond-level AI load fluctuations, longer backup-duration requirements, and a rising share of renewable power mean that a single standardized two-hour lithium-ion system is becoming less capable of addressing all use cases. Since 2025, suppliers have increasingly introduced one-hour high-rate systems, four-hour and eight-hour long-duration systems, as well as grid-forming and microgrid-oriented products specifically for AIDC applications. Sodium-ion batteries, flow batteries, zinc-based storage, and iron-air technologies are also emerging as potential alternatives for selected use cases.

From a policy and demand perspective, AI infrastructure development is gradually shifting from a conventional data center construction issue to an integrated computing-and-energy planning challenge, creating a more structural demand foundation for BESS than traditional time-of-use arbitrage alone. In 2026, China's National Development and Reform Commission, National Energy Administration, Ministry of Industry and Information Technology, and National Data Administration issued the Action Plan for Promoting the Two-Way Empowerment of Artificial Intelligence and Energy, calling for coordinated planning of computing infrastructure and energy resources, stronger diversified power supply capabilities for computing facilities, and the deployment of grid-forming energy storage where appropriate. Some local policies have gone further by promoting direct renewable power supply, coordinated computing-and-electricity development, and energy storage deployment at computing centers. The U.S. market is facing similar pressures from rapidly increasing large-scale data center loads and grid interconnection constraints, while on-site storage is increasingly being integrated with distributed generation, microgrids, and demand response to create a new “speed-to-power” model.

Report Scope

This report studies the global BESS for AIDC production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global BESS for AIDC total production and demand, 2021-2032, (MW)

Global BESS for AIDC total production value, 2021-2032, (USD Million)

Global BESS for AIDC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global BESS for AIDC consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: BESS for AIDC domestic production, consumption, key domestic manufacturers and share

Global BESS for AIDC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global BESS for AIDC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global BESS for AIDC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global BESS for AIDC 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 Tesla, Inc., Fluence Energy, Inc., FlexGen Power Systems, LLC, Honeywell International Inc., Canadian Solar Inc., Form Energy, Inc., Eos Energy Enterprises, Inc., ESS Tech, Inc., Redwood Materials, Inc., EPC 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 BESS for AIDC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MW) and average price (US\$/KW) 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 BESS for AIDC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global BESS for AIDC Market, Segmentation by Type:

LFP BESS

Sodium-ion/Flow Battery BESS

Others

Global BESS for AIDC Market, Segmentation by Architecture:

AC-coupled BESS

DC-coupled BESS

Hybrid BESS

Global BESS for AIDC Market, Segmentation by Application:

AI Load Smoothing & Power Quality

Backup & Resilience

Peak Shaving & Load Shifting

Renewable Energy Integration & Microgrid

Grid Support & Interconnection

Companies Profiled:

Tesla, Inc.

Fluence Energy, Inc.

FlexGen Power Systems, LLC

Honeywell International Inc.

Canadian Solar Inc.

Form Energy, Inc.

Eos Energy Enterprises, Inc.

ESS Tech, Inc.

Redwood Materials, Inc.

EPC Energy, Inc.

Vertiv Holdings Co.

GE Vernova Inc.

Energy Vault Holdings, Inc.

Stryten Energy LLC

Caterpillar Inc.

Cummins Inc.

Rehlko

Eaton Corporation plc

Wärtsilä Oyj Abp

SOCOMECH

Saft

Siemens Energy AG

Hitachi Energy Ltd.

Huawei Digital Power Technologies Co., Ltd.

Sungrow Power Supply Co., Ltd.

Contemporary Amperex Technology Co., Limited

Xiamen HiTHIUM Energy Storage Technology Co., Ltd.

Trina Solar Co., Ltd.

Guangzhou Great Power Energy & Technology Co., Ltd.

EVE Energy Co., Ltd.

Shenzhen CLOU Electronics Co., Ltd.

Kehua Data Co., Ltd.

Shuangdeng Group Co., Ltd.

Zhejiang Narada Power Source Co., Ltd.

Sunwoda Electronic Co., Ltd.

SVOLT Energy Technology Co., Ltd.

CORNEX New Energy Co., Ltd.

Shenzhen Center Power Tech Co., Ltd.

Envision Energy

JinkoSolar Holding Co., Ltd.

COSPOWERS

Xiamen Ampace Technology Co., Ltd.

Sumitomo Electric Industries, Ltd.

Samsung SDI Co., Ltd.

LG Energy Solution, Ltd.

Delta Electronics, Inc.

Key Questions Answered

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

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