

# Global BESS for AIDC Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global BESS for AIDC market size was valued at US\$ 769 million in 2025 and is forecast to a readjusted size of US\$ 3199 million by 2032 with a CAGR of 19.2% during review period.

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 is a detailed and comprehensive analysis for global BESS for AIDC market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global BESS for AIDC market size and forecasts, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global BESS for AIDC market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global BESS for AIDC market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global BESS for AIDC market shares of main players, shipments in revenue (\$ Million), sales quantity (MW), and ASP (US\$/KW), 2021-2026

## The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for BESS for AIDC

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global BESS for AIDC market based on the following parameters - company overview, sales quantity, revenue, 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.

BESS for AIDC market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## **Market Segmentation**

### **Market segment by Type**

LFP BESS

Sodium-ion/Flow Battery BESS

Others

### **Market segment by Architecture**

AC-coupled BESS

DC-coupled BESS

Hybrid BESS

## Market segment by Application

AI Load Smoothing & Power Quality

Backup & Resilience

Peak Shaving & Load Shifting

Renewable Energy Integration & Microgrid

Grid Support & Interconnection

## Major players covered

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.

Rehiko

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.

## **Market segment by region, regional analysis covers**

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

## Chapter Outline

Chapter 1, to describe BESS for AIDC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of BESS for AIDC, with price, sales quantity, revenue, and global market share of BESS for AIDC from 2021 to 2026.

Chapter 3, the BESS for AIDC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the BESS for AIDC breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and BESS for AIDC market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of BESS for AIDC.

Chapter 14 and 15, to describe BESS for AIDC sales channel, distributors, customers, research findings and conclusion.

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