

Global Data Center Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Battery market size is expected to reach \$ 7703 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Data Center Battery refers to battery products and battery energy storage systems specifically designed to provide backup power, short-duration high-power support and energy management for data center electrical infrastructure. These batteries are primarily deployed in Uninterruptible Power Supply (UPS) systems and Battery Energy Storage Systems (BESS), ensuring continuity of critical IT loads during grid outages, voltage fluctuations or generator transition periods, while selected systems can also support peak shaving, load balancing and grid-interactive energy management. Major battery technologies include lithium-ion batteries and advanced lead-acid batteries, with lithium-ion solutions gaining importance because of their higher power density, smaller footprint, longer cycle life and intelligent battery management capabilities, while lead-acid technologies retain a significant installed base in conventional UPS environments. The research scope focuses on battery cells, modules, cabinets and integrated battery systems used in enterprise, cloud and hyperscale, and edge data centers.

Key Findings

UPS and BESS are the two principal deployment forms for data center battery systems

Lithium-ion and advanced lead-acid batteries remain the major commercial technology routes

Cloud and hyperscale data centers are driving demand for higher-power-density battery solutions

AI computing is accelerating adoption of compact high-rate and intelligent battery systems

Market Trends

Data center batteries are evolving from conventional standby backup components toward high-power, intelligent and increasingly multifunctional energy assets. Rapid growth in AI computing is increasing rack power density and creating more dynamic load fluctuations, requiring batteries capable of delivering very high power within seconds or minutes while occupying less physical space. Lithium-ion technology is therefore expanding across UPS and distributed backup architectures, while high-performance lead-acid technologies such as TPPL and advanced AGM continue to improve power density, service life and thermal performance. Another important trend is the transition from centralized UPS-only architectures toward combinations of centralized UPS, rack-level or distributed battery backup, HVDC power systems and BESS. Samsung SDI is developing high-output UPS and BBU batteries for AI data centers, Panasonic Energy is expanding rack-mounted data center energy storage systems, and Sunwoda is developing 6C and 10C high-rate lithium systems and 800V architectures for AIDC applications.

Market Dynamics

Drivers

The primary growth driver is the rapid expansion of cloud computing, generative AI and high-performance computing infrastructure. AI servers require substantially higher and more variable power than conventional computing equipment, increasing the importance of backup systems that can respond immediately to outages and transient load changes. At the same time, hyperscale operators are building larger facilities and increasing rack-level power density, creating demand for batteries with higher discharge rates, compact footprints and enhanced safety. LG Energy Solution has identified data-center UPS and BBU as emerging ESS applications, while Samsung SDI and Panasonic Energy are actively expanding battery solutions for AI data centers. Growth in edge computing also supports smaller and more distributed battery installations

closer to end users.

Restraints

Data center batteries face strict requirements for reliability, fire safety, lifecycle performance and compatibility with UPS and power-distribution equipment because battery failure can directly affect mission-critical computing infrastructure. Lithium-ion systems require sophisticated BMS, thermal management and protection against thermal propagation, increasing initial system complexity and qualification requirements. Lead-acid batteries generally have lower energy density and may require larger installation footprints and more frequent replacement, while lithium-ion systems typically involve higher initial capital expenditure. Long customer qualification cycles, differences in regional safety codes and the need to integrate batteries with existing UPS architectures also slow technology replacement, particularly in brownfield data centers.

Opportunities

Major opportunities are emerging from AI data centers, distributed battery backup, high-voltage DC architectures and the integration of backup power with energy-storage functions. Data center operators increasingly seek battery systems that can serve not only as emergency backup but also support peak shaving, grid services and power-quality management, improving asset utilization compared with traditional standby-only batteries. Panasonic Energy is developing rack-mounted systems combining backup and peak-shaving functions, while Tesla explicitly positions Megapack for continuous power support at data centers. CATL has also identified AI-driven data centers as an important application for high-density BESS solutions. High-rate lithium batteries, LFP systems, LTO systems and intelligent modular battery cabinets therefore represent important growth opportunities.

Challenges

The main challenge is achieving high power density without compromising safety, service life or total cost of ownership. AI workloads can produce sharp power fluctuations, requiring batteries to deliver high discharge rates repeatedly, while data-center operators expect extremely high availability and predictable degradation. Increasing energy density can raise thermal-management and fire-safety requirements, making cell chemistry, system architecture, BMS algorithms and thermal propagation

control critical competitive factors. Suppliers must also adapt to rapidly evolving power architectures, including traditional UPS, BBU, HVDC and emerging 800V systems. At the same time, different customers adopt different backup durations and redundancy strategies, requiring battery manufacturers to maintain flexible portfolios rather than rely on a single standardized configuration.

Industry Chain Analysis

The upstream industry includes lithium, nickel, cobalt, iron phosphate, graphite, lead and other battery materials, together with separators, electrolytes, battery management ICs, thermal-management components and battery manufacturing equipment. Midstream participants manufacture battery cells, modules, racks, cabinets and integrated battery systems. Lithium-ion suppliers increasingly integrate cells with BMS, fire protection, communications and monitoring functions, while advanced lead-acid manufacturers focus on high-rate discharge performance, reliability and long float life. Downstream battery systems are integrated with UPS, HVDC systems and BESS platforms before deployment in enterprise, cloud and hyperscale, and edge data centers. Value creation is gradually shifting from individual battery cells toward complete system design, power-electronics compatibility, safety engineering, intelligent monitoring and lifecycle services.

Segment Insights

By product type, the market can be divided into Uninterruptible Power Supply (UPS) batteries and Battery Energy Storage System (BESS) batteries. UPS batteries remain the fundamental category for mission-critical backup, supplying power immediately after utility failure until generators or alternative power sources become available. Their performance priorities are high-rate discharge, reliability, short response time and predictable backup duration. BESS batteries operate across broader energy-management scenarios and can provide longer-duration backup, peak shaving, demand management and grid interaction. As data-center power demand increases, the functional boundary between UPS and BESS is becoming less rigid, with some operators exploring architectures in which battery assets provide both emergency backup and energy-management functions.

By battery technology, the market primarily consists of lithium-ion batteries and advanced lead-acid batteries. Lithium-ion batteries are gaining share because of higher

energy and power density, smaller footprint, longer cycle life and digital BMS capabilities. Different lithium chemistries are also being optimized for specific applications, including LFP for safety and lifecycle performance and LTO for high power, rapid recharge and long cycle life. Toshiba's SCiB LTO systems are specifically positioned for data-center UPS applications. Advanced lead-acid batteries, including AGM, flooded lead-acid and TPPL technologies, remain important due to mature supply chains, established UPS compatibility and relatively predictable capital costs. EnerSys, GS Yuasa, C&D Technologies and Exide continue to develop high-performance lead-acid solutions for data-center backup applications.

Downstream Market Opportunities

Cloud and hyperscale data centers represent an increasingly important opportunity because large AI and cloud operators require very high backup capacity, high power density and standardized global deployment. Enterprise data centers continue to demand reliable UPS battery systems, with replacement cycles creating a recurring aftermarket. Edge data centers provide another opportunity for modular, compact and maintenance-efficient battery systems because installations are smaller, geographically distributed and often operate with limited on-site technical support. As AI workloads spread from hyperscale facilities toward enterprise and edge environments, battery suppliers capable of offering scalable portfolios from rack-level backup to multi-megawatt BESS can address a broader range of downstream requirements.

Regional Insights

North America represents an important demand center because of its concentration of hyperscale cloud operators, AI computing infrastructure and large data-center campuses. The region is also a major market for both lithium-ion and advanced lead-acid UPS batteries. Asia-Pacific is increasingly important on both the supply and demand sides, with leading battery manufacturers in China, South Korea and Japan and rapid growth in cloud and AI infrastructure. Samsung SDI, LG Energy Solution, Panasonic Energy, Toshiba, CATL, BYD, EVE Energy and Sunwoda provide the region with a strong battery manufacturing base. Europe maintains significant demand for high-reliability UPS batteries and increasingly emphasizes energy efficiency, safety and integration with renewable-energy systems. Regional competition is increasingly influenced by local manufacturing, safety certification, supply-chain security and technical service capability.

Competitive Landscape Analysis

The competitive landscape spans lithium-ion cell manufacturers, specialized stationary battery suppliers and integrated energy-storage companies. The enterprise pool provided for this study includes LG Energy Solution, Samsung SDI, Tesla, Panasonic, GS Yuasa Battery, EnerSys, Toshiba, BYD, Contemporary Amperex Technology (CATL), EVE Energy and Sunwoda Electronics. Their positioning differs significantly: Samsung SDI, LG Energy Solution, Panasonic Energy, Toshiba, EVE Energy and Sunwoda are increasingly focused on lithium-ion backup and high-rate data-center applications; EnerSys and GS Yuasa maintain strong positions in traditional and advanced lead-acid UPS batteries while expanding newer storage technologies; Tesla and CATL are particularly relevant to the BESS side of data-center power infrastructure; BYD also provides lithium battery and energy-storage solutions applicable to data-center environments. Based on the enhanced global supplier pool, Saft, C&D Technologies and Exide Technologies are additional established data-center battery suppliers. Competition is shifting toward high-rate discharge capability, power density, thermal safety, lifecycle performance, modularity, BMS intelligence and compatibility with emerging UPS, BBU and HVDC architectures rather than battery cell cost alone.

Report Scope

This report studies the global Data Center Battery production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Data Center Battery total production and demand, 2021-2032, (MW)

Global Data Center Battery total production value, 2021-2032, (USD Million)

Global Data Center Battery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global Data Center Battery consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: Data Center Battery domestic production, consumption, key domestic manufacturers and share

Global Data Center Battery production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global Data Center Battery production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global Data Center Battery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global Data Center Battery 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 LG Energy Solution, Samsung SDI, Tesla, Panasonic, GS Yuasa Battery, EnerSys, Toshiba, BYD, Contemporary Amperex Technology, EVE ENERGY, 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 Data Center Battery 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 Data Center Battery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Data Center Battery Market, Segmentation by Type:

Uninterruptible Power Supply (UPS)

Battery Energy Storage System (BESS)

Global Data Center Battery Market, Segmentation by Battery Type:

Lithium ion Battery

Advanced Lead Acid Battery

Others

Global Data Center Battery Market, Segmentation by Application:

Enterprise Data Centers

Cloud & Hyperscale Data Centers

Edge Data Centers

Others

Companies Profiled:

LG Energy Solution

Samsung SDI

Tesla

Panasonic

GS Yuasa Battery

EnerSys

Toshiba

BYD

Contemporary Amperex Technology

EVE ENERGY

Sunwoda Electronics

Key Questions Answered

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

Contents

1 SUPPLY SUMMARY

- 1.1 Data Center Battery Introduction
- 1.2 World Data Center Battery Supply & Forecast
 - 1.2.1 World Data Center Battery Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Data Center Battery Production (2021-2032)
 - 1.2.3 World Data Center Battery Pricing Trends (2021-2032)
- 1.3 World Data Center Battery Production by Region (Based on Production Site)
 - 1.3.1 World Data Center Battery Production Value by Region (2021-2032)
 - 1.3.2 World Data Center Battery Production by Region (2021-2032)
 - 1.3.3 World Data Center Battery Average Price by Region (2021-2032)
 - 1.3.4 North America Data Center Battery Production (2021-2032)
 - 1.3.5 Europe Data Center Battery Production (2021-2032)
 - 1.3.6 China Data Center Battery Production (2021-2032)
 - 1.3.7 Japan Data Center Battery Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Data Center Battery Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Data Center Battery Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Data Center Battery Demand (2021-2032)
- 2.2 World Data Center Battery Consumption by Region
 - 2.2.1 World Data Center Battery Consumption by Region (2021-2026)
 - 2.2.2 World Data Center Battery Consumption Forecast by Region (2027-2032)
- 2.3 United States Data Center Battery Consumption (2021-2032)
- 2.4 China Data Center Battery Consumption (2021-2032)
- 2.5 Europe Data Center Battery Consumption (2021-2032)
- 2.6 Japan Data Center Battery Consumption (2021-2032)
- 2.7 South Korea Data Center Battery Consumption (2021-2032)
- 2.8 ASEAN Data Center Battery Consumption (2021-2032)
- 2.9 India Data Center Battery Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Data Center Battery Production Value by Manufacturer (2021-2026)

- 3.2 World Data Center Battery Production by Manufacturer (2021-2026)
- 3.3 World Data Center Battery Average Price by Manufacturer (2021-2026)
- 3.4 Data Center Battery Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Data Center Battery Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Data Center Battery in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Data Center Battery in 2025
- 3.6 Data Center Battery Market: Overall Company Footprint Analysis
 - 3.6.1 Data Center Battery Market: Region Footprint
 - 3.6.2 Data Center Battery Market: Company Product Type Footprint
 - 3.6.3 Data Center Battery Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Data Center Battery Production Value Comparison
 - 4.1.1 United States VS China: Data Center Battery Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Data Center Battery Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Data Center Battery Production Comparison
 - 4.2.1 United States VS China: Data Center Battery Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Data Center Battery Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Data Center Battery Consumption Comparison
 - 4.3.1 United States VS China: Data Center Battery Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Data Center Battery Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Data Center Battery Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Data Center Battery Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Data Center Battery Production Value (2021-2026)

4.4.3 United States Based Manufacturers Data Center Battery Production (2021-2026)

4.5 China Based Data Center Battery Manufacturers and Market Share

4.5.1 China Based Data Center Battery Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Data Center Battery Production Value (2021-2026)

4.5.3 China Based Manufacturers Data Center Battery Production (2021-2026)

4.6 Rest of World Based Data Center Battery Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Data Center Battery Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Data Center Battery Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Data Center Battery Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Data Center Battery Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Uninterruptible Power Supply (UPS)

5.2.2 Battery Energy Storage System (BESS)

5.3 Market Segment by Type

5.3.1 World Data Center Battery Production by Type (2021-2032)

5.3.2 World Data Center Battery Production Value by Type (2021-2032)

5.3.3 World Data Center Battery Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY BATTERY TYPE

6.1 World Data Center Battery Market Size Overview by Battery Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Battery Type

6.2.1 Lithium ion Battery

6.2.2 Advanced Lead Acid Battery

6.2.3 Others

6.3 Market Segment by Battery Type

6.3.1 World Data Center Battery Production by Battery Type (2021-2032)

6.3.2 World Data Center Battery Production Value by Battery Type (2021-2032)

6.3.3 World Data Center Battery Average Price by Battery Type (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Data Center Battery Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

- 7.2.1 Enterprise Data Centers
- 7.2.2 Cloud & Hyperscale Data Centers
- 7.2.3 Edge Data Centers
- 7.2.4 Others

7.3 Market Segment by Application

- 7.3.1 World Data Center Battery Production by Application (2021-2032)
- 7.3.2 World Data Center Battery Production Value by Application (2021-2032)
- 7.3.3 World Data Center Battery Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 LG Energy Solution

- 8.1.1 LG Energy Solution Details
- 8.1.2 LG Energy Solution Major Business
- 8.1.3 LG Energy Solution Data Center Battery Product and Services
- 8.1.4 LG Energy Solution Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.1.5 LG Energy Solution Recent Developments/Updates
- 8.1.6 LG Energy Solution Competitive Strengths & Weaknesses

8.2 Samsung SDI

- 8.2.1 Samsung SDI Details
- 8.2.2 Samsung SDI Major Business
- 8.2.3 Samsung SDI Data Center Battery Product and Services
- 8.2.4 Samsung SDI Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.2.5 Samsung SDI Recent Developments/Updates
- 8.2.6 Samsung SDI Competitive Strengths & Weaknesses

8.3 Tesla

- 8.3.1 Tesla Details
- 8.3.2 Tesla Major Business
- 8.3.3 Tesla Data Center Battery Product and Services
- 8.3.4 Tesla Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 8.3.5 Tesla Recent Developments/Updates
- 8.3.6 Tesla Competitive Strengths & Weaknesses
- 8.4 Panasonic
 - 8.4.1 Panasonic Details
 - 8.4.2 Panasonic Major Business
 - 8.4.3 Panasonic Data Center Battery Product and Services
 - 8.4.4 Panasonic Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.4.5 Panasonic Recent Developments/Updates
 - 8.4.6 Panasonic Competitive Strengths & Weaknesses
- 8.5 GS Yuasa Battery
 - 8.5.1 GS Yuasa Battery Details
 - 8.5.2 GS Yuasa Battery Major Business
 - 8.5.3 GS Yuasa Battery Data Center Battery Product and Services
 - 8.5.4 GS Yuasa Battery Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.5.5 GS Yuasa Battery Recent Developments/Updates
 - 8.5.6 GS Yuasa Battery Competitive Strengths & Weaknesses
- 8.6 EnerSys
 - 8.6.1 EnerSys Details
 - 8.6.2 EnerSys Major Business
 - 8.6.3 EnerSys Data Center Battery Product and Services
 - 8.6.4 EnerSys Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.6.5 EnerSys Recent Developments/Updates
 - 8.6.6 EnerSys Competitive Strengths & Weaknesses
- 8.7 Toshiba
 - 8.7.1 Toshiba Details
 - 8.7.2 Toshiba Major Business
 - 8.7.3 Toshiba Data Center Battery Product and Services
 - 8.7.4 Toshiba Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.7.5 Toshiba Recent Developments/Updates
 - 8.7.6 Toshiba Competitive Strengths & Weaknesses
- 8.8 BYD
 - 8.8.1 BYD Details
 - 8.8.2 BYD Major Business
 - 8.8.3 BYD Data Center Battery Product and Services
 - 8.8.4 BYD Data Center Battery Production, Price, Value, Gross Margin and Market

Share (2021-2026)

8.8.5 BYD Recent Developments/Updates

8.8.6 BYD Competitive Strengths & Weaknesses

8.9 Contemporary Amperex Technology

8.9.1 Contemporary Amperex Technology Details

8.9.2 Contemporary Amperex Technology Major Business

8.9.3 Contemporary Amperex Technology Data Center Battery Product and Services

8.9.4 Contemporary Amperex Technology Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.9.5 Contemporary Amperex Technology Recent Developments/Updates

8.9.6 Contemporary Amperex Technology Competitive Strengths & Weaknesses

8.10 EVE ENERGY

8.10.1 EVE ENERGY Details

8.10.2 EVE ENERGY Major Business

8.10.3 EVE ENERGY Data Center Battery Product and Services

8.10.4 EVE ENERGY Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.10.5 EVE ENERGY Recent Developments/Updates

8.10.6 EVE ENERGY Competitive Strengths & Weaknesses

8.11 Sunwoda Electronics

8.11.1 Sunwoda Electronics Details

8.11.2 Sunwoda Electronics Major Business

8.11.3 Sunwoda Electronics Data Center Battery Product and Services

8.11.4 Sunwoda Electronics Data Center Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.11.5 Sunwoda Electronics Recent Developments/Updates

8.11.6 Sunwoda Electronics Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Data Center Battery Industry Chain

9.2 Data Center Battery Upstream Analysis

9.2.1 Data Center Battery Core Raw Materials

9.2.2 Main Manufacturers of Data Center Battery Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Data Center Battery Production Mode

9.6 Data Center Battery Procurement Model

9.7 Data Center Battery Industry Sales Model and Sales Channels

9.7.1 Data Center Battery Sales Model

9.7.2 Data Center Battery Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Data Center Battery Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Data Center Battery Production Value by Region (2021-2026) & (USD Million)

Table 3. World Data Center Battery Production Value by Region (2027-2032) & (USD Million)

Table 4. World Data Center Battery Production Value Market Share by Region (2021-2026)

Table 5. World Data Center Battery Production Value Market Share by Region (2027-2032)

Table 6. World Data Center Battery Production by Region (2021-2026) & (MW)

Table 7. World Data Center Battery Production by Region (2027-2032) & (MW)

Table 8. World Data Center Battery Production Market Share by Region (2021-2026)

Table 9. World Data Center Battery Production Market Share by Region (2027-2032)

Table 10. World Data Center Battery Average Price by Region (2021-2026) & (US\$/KW)

Table 11. World Data Center Battery Average Price by Region (2027-2032) & (US\$/KW)

Table 12. Data Center Battery Major Market Trends

Table 13. World Data Center Battery Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (MW)

Table 14. World Data Center Battery Consumption by Region (2021-2026) & (MW)

Table 15. World Data Center Battery Consumption Forecast by Region (2027-2032) & (MW)

Table 16. World Data Center Battery Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Data Center Battery Producers in 2025

Table 18. World Data Center Battery Production by Manufacturer (2021-2026) & (MW)

Table 19. Production Market Share of Key Data Center Battery Producers in 2025

Table 20. World Data Center Battery Average Price by Manufacturer (2021-2026) & (US\$/KW)

Table 21. Global Data Center Battery Company Evaluation Quadrant

Table 22. World Data Center Battery Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Data Center Battery Production Site of Key Manufacturer

Table 24. Data Center Battery Market: Company Product Type Footprint

Table 25. Data Center Battery Market: Company Product Application Footprint

Table 26. Data Center Battery Competitive Factors

Table 27. Data Center Battery New Entrant and Capacity Expansion Plans

Table 28. Data Center Battery Mergers & Acquisitions Activity

Table 29. United States VS China Data Center Battery Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Data Center Battery Production Comparison, (2021 & 2025 & 2032) & (MW)

Table 31. United States VS China Data Center Battery Consumption Comparison, (2021 & 2025 & 2032) & (MW)

Table 32. United States Based Data Center Battery Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Data Center Battery Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Data Center Battery Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Data Center Battery Production (2021-2026) & (MW)

Table 36. United States Based Manufacturers Data Center Battery Production Market Share (2021-2026)

Table 37. China Based Data Center Battery Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Data Center Battery Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Data Center Battery Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Data Center Battery Production, (2021-2026) & (MW)

Table 41. China Based Manufacturers Data Center Battery Production Market Share (2021-2026)

Table 42. Rest of World Based Data Center Battery Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Data Center Battery Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Data Center Battery Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Data Center Battery Production, (2021-2026) & (MW)

Table 46. Rest of World Based Manufacturers Data Center Battery Production Market Share (2021-2026)

Table 47. World Data Center Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Data Center Battery Production by Type (2021-2026) & (MW)

Table 49. World Data Center Battery Production by Type (2027-2032) & (MW)

Table 50. World Data Center Battery Production Value by Type (2021-2026) & (USD Million)

Table 51. World Data Center Battery Production Value by Type (2027-2032) & (USD Million)

Table 52. World Data Center Battery Average Price by Type (2021-2026) & (US\$/KW)

Table 53. World Data Center Battery Average Price by Type (2027-2032) & (US\$/KW)

Table 54. World Data Center Battery Production Value by Battery Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Data Center Battery Production by Battery Type (2021-2026) & (MW)

Table 56. World Data Center Battery Production by Battery Type (2027-2032) & (MW)

Table 57. World Data Center Battery Production Value by Battery Type (2021-2026) & (USD Million)

Table 58. World Data Center Battery Production Value by Battery Type (2027-2032) & (USD Million)

Table 59. World Data Center Battery Average Price by Battery Type (2021-2026) & (US\$/KW)

Table 60. World Data Center Battery Average Price by Battery Type (2027-2032) & (US\$/KW)

Table 61. World Data Center Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Data Center Battery Production by Application (2021-2026) & (MW)

Table 63. World Data Center Battery Production by Application (2027-2032) & (MW)

Table 64. World Data Center Battery Production Value by Application (2021-2026) & (USD Million)

Table 65. World Data Center Battery Production Value by Application (2027-2032) & (USD Million)

Table 66. World Data Center Battery Average Price by Application (2021-2026) & (US\$/KW)

Table 67. World Data Center Battery Average Price by Application (2027-2032) & (US\$/KW)

Table 68. LG Energy Solution Basic Information, Manufacturing Base and Competitors

Table 69. LG Energy Solution Major Business

Table 70. LG Energy Solution Data Center Battery Product and Services

Table 71. LG Energy Solution Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. LG Energy Solution Recent Developments/Updates
Table 73. LG Energy Solution Competitive Strengths & Weaknesses
Table 74. Samsung SDI Basic Information, Manufacturing Base and Competitors
Table 75. Samsung SDI Major Business
Table 76. Samsung SDI Data Center Battery Product and Services
Table 77. Samsung SDI Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 78. Samsung SDI Recent Developments/Updates
Table 79. Samsung SDI Competitive Strengths & Weaknesses
Table 80. Tesla Basic Information, Manufacturing Base and Competitors
Table 81. Tesla Major Business
Table 82. Tesla Data Center Battery Product and Services
Table 83. Tesla Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 84. Tesla Recent Developments/Updates
Table 85. Tesla Competitive Strengths & Weaknesses
Table 86. Panasonic Basic Information, Manufacturing Base and Competitors
Table 87. Panasonic Major Business
Table 88. Panasonic Data Center Battery Product and Services
Table 89. Panasonic Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 90. Panasonic Recent Developments/Updates
Table 91. Panasonic Competitive Strengths & Weaknesses
Table 92. GS Yuasa Battery Basic Information, Manufacturing Base and Competitors
Table 93. GS Yuasa Battery Major Business
Table 94. GS Yuasa Battery Data Center Battery Product and Services
Table 95. GS Yuasa Battery Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 96. GS Yuasa Battery Recent Developments/Updates
Table 97. GS Yuasa Battery Competitive Strengths & Weaknesses
Table 98. EnerSys Basic Information, Manufacturing Base and Competitors
Table 99. EnerSys Major Business
Table 100. EnerSys Data Center Battery Product and Services
Table 101. EnerSys Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 102. EnerSys Recent Developments/Updates
Table 103. EnerSys Competitive Strengths & Weaknesses
Table 104. Toshiba Basic Information, Manufacturing Base and Competitors
Table 105. Toshiba Major Business

Table 106. Toshiba Data Center Battery Product and Services

Table 107. Toshiba Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Toshiba Recent Developments/Updates

Table 109. Toshiba Competitive Strengths & Weaknesses

Table 110. BYD Basic Information, Manufacturing Base and Competitors

Table 111. BYD Major Business

Table 112. BYD Data Center Battery Product and Services

Table 113. BYD Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. BYD Recent Developments/Updates

Table 115. BYD Competitive Strengths & Weaknesses

Table 116. Contemporary Amperex Technology Basic Information, Manufacturing Base and Competitors

Table 117. Contemporary Amperex Technology Major Business

Table 118. Contemporary Amperex Technology Data Center Battery Product and Services

Table 119. Contemporary Amperex Technology Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Contemporary Amperex Technology Recent Developments/Updates

Table 121. Contemporary Amperex Technology Competitive Strengths & Weaknesses

Table 122. EVE ENERGY Basic Information, Manufacturing Base and Competitors

Table 123. EVE ENERGY Major Business

Table 124. EVE ENERGY Data Center Battery Product and Services

Table 125. EVE ENERGY Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. EVE ENERGY Recent Developments/Updates

Table 127. EVE ENERGY Competitive Strengths & Weaknesses

Table 128. Sunwoda Electronics Basic Information, Manufacturing Base and Competitors

Table 129. Sunwoda Electronics Major Business

Table 130. Sunwoda Electronics Data Center Battery Product and Services

Table 131. Sunwoda Electronics Data Center Battery Production (MW), Price (US\$/KW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Sunwoda Electronics Recent Developments/Updates

Table 133. Sunwoda Electronics Competitive Strengths & Weaknesses

Table 134. Global Key Players of Data Center Battery Upstream (Raw Materials)

Table 135. Global Data Center Battery Typical Customers

Table 136. Data Center Battery Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Data Center Battery Picture

Figure 2. World Data Center Battery Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Data Center Battery Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Data Center Battery Production (2021-2032) & (MW)

Figure 5. World Data Center Battery Average Price (2021-2032) & (US\$/KW)

Figure 6. World Data Center Battery Production Value Market Share by Region (2021-2032)

Figure 7. World Data Center Battery Production Market Share by Region (2021-2032)

Figure 8. North America Data Center Battery Production (2021-2032) & (MW)

Figure 9. Europe Data Center Battery Production (2021-2032) & (MW)

Figure 10. China Data Center Battery Production (2021-2032) & (MW)

Figure 11. Japan Data Center Battery Production (2021-2032) & (MW)

Figure 12. Data Center Battery Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Data Center Battery Consumption (2021-2032) & (MW)

Figure 15. World Data Center Battery Consumption Market Share by Region (2021-2032)

Figure 16. United States Data Center Battery Consumption (2021-2032) & (MW)

Figure 17. China Data Center Battery Consumption (2021-2032) & (MW)

Figure 18. Europe Data Center Battery Consumption (2021-2032) & (MW)

Figure 19. Japan Data Center Battery Consumption (2021-2032) & (MW)

Figure 20. South Korea Data Center Battery Consumption (2021-2032) & (MW)

Figure 21. ASEAN Data Center Battery Consumption (2021-2032) & (MW)

Figure 22. India Data Center Battery Consumption (2021-2032) & (MW)

Figure 23. Producer Shipments of Data Center Battery by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Data Center Battery Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Data Center Battery Markets in 2025

Figure 26. United States VS China: Data Center Battery Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Data Center Battery Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Data Center Battery Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Data Center Battery Production Market Share 2025

Figure 30. China Based Manufacturers Data Center Battery Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Data Center Battery Production Market Share 2025

Figure 32. World Data Center Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Data Center Battery Production Value Market Share by Type in 2025

Figure 34. Uninterruptible Power Supply (UPS)

Figure 35. Battery Energy Storage System (BESS)

Figure 36. World Data Center Battery Production Market Share by Type (2021-2032)

Figure 37. World Data Center Battery Production Value Market Share by Type (2021-2032)

Figure 38. World Data Center Battery Average Price by Type (2021-2032) & (US\$/KW)

Figure 39. World Data Center Battery Production Value by Battery Type, (USD Million), 2021 & 2025 & 2032

Figure 40. World Data Center Battery Production Value Market Share by Battery Type in 2025

Figure 41. Lithium ion Battery

Figure 42. Advanced Lead Acid Battery

Figure 43. Others

Figure 44. World Data Center Battery Production Market Share by Battery Type (2021-2032)

Figure 45. World Data Center Battery Production Value Market Share by Battery Type (2021-2032)

Figure 46. World Data Center Battery Average Price by Battery Type (2021-2032) & (US\$/KW)

Figure 47. World Data Center Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Data Center Battery Production Value Market Share by Application in 2025

Figure 49. Enterprise Data Centers

Figure 50. Cloud & Hyperscale Data Centers

Figure 51. Edge Data Centers

Figure 52. Others

Figure 53. World Data Center Battery Production Market Share by Application (2021-2032)

Figure 54. World Data Center Battery Production Value Market Share by Application (2021-2032)

Figure 55. World Data Center Battery Average Price by Application (2021-2032) & (US\$/KW)

Figure 56. Data Center Battery Industry Chain

Figure 57. Data Center Battery Procurement Model

Figure 58. Data Center Battery Sales Model

Figure 59. Data Center Battery Sales Channels, Direct Sales, and Distribution

Figure 60. Methodology

Figure 61. Research Process and Data Source

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