

# Global Large-scale Energy Storage PCS Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Large-scale Energy Storage PCS market size is expected to reach \$ 6821 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

The Large-scale Energy Storage PCS (Power Conversion System) is the core energy interface in an energy storage system that connects the DC-side battery to the AC-side power grid. Infineon defines PCS as an intermediate device positioned between large-scale DC battery banks and the AC grid. The U.S. Department of Energy (DOE), in its energy storage system metadata requirements, also lists PCS as a system-level critical component and requires the recording of parameters such as rated power, bidirectional AC/DC inverter rated capacity, voltage, and current. Hitachi Energy characterizes it as a high-power-density bidirectional power conversion device designed for utility-scale battery energy storage systems.

Based on the terminology provided in the appendix and authoritative public sources, this report defines Large-scale Energy Storage PCS as: a power conversion device and its tightly integrated supporting units that performs bidirectional energy conversion, charge-discharge control, grid-support functions, and power quality regulation within large-scale energy storage systems.

From a global perspective, the Large-scale Energy Storage PCS industry has entered a critical transition phase, shifting from a policy-driven incubation period to a stage of large-scale volume expansion. In terms of growth quality, the sector exhibits the typical characteristics of rapid scale expansion, continuous price decline, and ongoing structural upgrading. Shipment growth has significantly outpaced revenue growth, indicating that Large-scale Energy Storage PCS products are transitioning from an early

stage marked by high premiums and project-based supply toward a phase characterized by standardization, platformization, and mass manufacturing. In the coming years, industry growth will no longer rely solely on the number of newly commissioned projects; instead, it will increasingly be driven by a rising share of high-power products, breakthroughs in high-value overseas markets, deeper penetration of grid-forming and high value-added models, and structural upgrades enabled by integrated system solutions.

This report shows that demand for Large-scale Energy Storage PCS has clearly concentrated in utility-scale and source?grid coordination scenarios. By 2025, grid-side applications accounted for 57.71% of revenue, while generation-side applications represented 29.24%, with the two segments together approaching 90%. By 2032, the revenue shares of grid-side and generation-side applications are expected to further increase to 59.84% and 32.92%, respectively. This implies that the primary drivers of future industry demand will continue to include independent energy storage, shared energy storage, renewable-plus-storage configurations, grid frequency regulation and peak shaving, black-start capability, and support for weak grids.

Although the user-side segment still retains some market potential, its share will continue to decline under the statistical scope of Large-scale Energy Storage PCS. The fundamental reason is that the core value proposition of Large-scale Energy Storage PCS is better suited to large-scale grid connection, centralized dispatch, and station-level coordinated control scenarios, rather than to low-power, highly distributed commercial-and-industrial or residential markets. Consequently, the future competitive focus of the industry will not lie in covering a larger number of fragmented end-users, but rather in the ability to deliver higher power density, stronger grid-friendliness, superior station-level integration capability, and more stable full-lifecycle services in utility-scale projects.

Based on the quantitative modeling and qualitative analysis presented in this report, it can be concluded that Large-scale Energy Storage PCS constitutes a critical core piece of equipment in the development of new-type energy storage systems and modern power systems. The industry has progressed from the early introduction phase to a new stage characterized by simultaneous large-scale expansion and structural upgrading. In the coming years, market opportunities will continue to concentrate in grid-side and generation-side applications, high-power platforms, grid-forming products, and overseas localization capabilities. For policymakers, the priority lies in improving standards, market mechanisms, and industrial coordination; for enterprises, the focus should be on enhancing product platformization, station-level solution capabilities, and global delivery

and service systems; and for investors, attention should be directed toward leading and high-growth manufacturers with deep technological expertise, established overseas presence, strong customer resources, and sustainable profitability.

This report studies the global Large-scale Energy Storage PCS production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Large-scale Energy Storage PCS 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 Large-scale Energy Storage PCS that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Large-scale Energy Storage PCS total production and demand, 2021-2032, (MW)

Global Large-scale Energy Storage PCS total production value, 2021-2032, (USD Million)

Global Large-scale Energy Storage PCS production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global Large-scale Energy Storage PCS consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: Large-scale Energy Storage PCS domestic production, consumption, key domestic manufacturers and share

Global Large-scale Energy Storage PCS production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global Large-scale Energy Storage PCS production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global Large-scale Energy Storage PCS production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global Large-scale Energy Storage PCS 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, Sungrow, SMA, Kehua Digital Energy Tech, EPC Power, NR Electric, Huawei Technologies, Ingeteam, Nidec, Xuji Electric, 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 Large-scale Energy Storage PCS 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 Large-scale Energy Storage PCS Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Large-scale Energy Storage PCS Market, Segmentation by Type:

Below 0.5MW

0.5?1MW

1?2MW

2?3MW

3?5MW

5MW and Above

### Global Large-scale Energy Storage PCS Market, Segmentation by Technology:

Grid-following

Grid-forming

### Global Large-scale Energy Storage PCS Market, Segmentation by Operational Value:

Energy-Type Applications

Power-Type Applications

### Global Large-scale Energy Storage PCS Market, Segmentation by Application:

Grid Side

Power Supply Side

User Side

Other

### Companies Profiled:

Tesla

Sungrow

SMA

Kehua Digital Energy Tech

EPC Power

NR Electric

Huawei Technologies

Ingeteam

Nidec

Xuji Electric

Hopewind Electric

GE Vernova

Power Electronics

Sineng Electric

Hitachi Energy

Beijing In-Power Electric

Sinexcel Electric

WSTECH

Zhiguang Energy Storage Technology

TMEIC

Beijing Soaring Electric Technology

Dynapower

Zhuzhou CRRC Times Electric

Delta Electronics

SOFARSOLAR

**Key Questions Answered:**

1. How big is the global Large-scale Energy Storage PCS market?
2. What is the demand of the global Large-scale Energy Storage PCS market?
3. What is the year over year growth of the global Large-scale Energy Storage PCS market?
4. What is the production and production value of the global Large-scale Energy Storage PCS market?
5. Who are the key producers in the global Large-scale Energy Storage PCS market?
6. What are the growth factors driving the market demand?

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