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Global Lithium-Ion Battery Racks for Data Centers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Lithium-Ion Battery Racks for Data Centers market size is expected to reach $ 3213 million by 2032, rising at a market growth of 13.8% CAGR during the forecast period (2026-2032).

Lithium-ion battery racks for data centers are complete energy-storage assemblies engineered for uninterruptible power supplies and critical DC power systems. They typically integrate lithium iron phosphate, nickel manganese cobalt, or lithium titanate battery modules with a rack or enclosed cabinet, branch protection, DC buswork, contactors, fuses, sensors, thermal management, and multilayer battery management systems. During utility disturbances, the system rapidly supplies the UPS DC bus or critical load while continuously monitoring cell voltage, temperature, state of charge, state of health, and fault conditions. The study focuses on complete rack and cabinet systems sold for data-center use across different chemistries, nominal DC voltages, usable energy ratings, and backup-duration configurations. Key purchasing specifications include peak and continuous discharge power, usable capacity, cycle and calendar life, recharge rate, footprint and weight, parallel scalability, UPS communication compatibility, thermal-runaway protection, and safety certification. Principal demand comes from hyperscale, colocation, enterprise, edge, and telecom data centers. The blended gross margin is approximately 28%.

Market Trends

Lithium-ion battery racks are evolving from compact replacements for lead-acid backup banks into monitored and dispatchable energy-storage nodes connected with UPS controls, energy-management platforms, and building-management systems. Higher

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server-rack density and more volatile AI computing loads are pushing products toward greater discharge rates, faster recharge, smaller footprints, and more granular cell-level supervision. LFP is expanding because of thermal stability, cycle life, and a mature supply chain; NMC continues to serve projects prioritizing power density and space efficiency, while LTO remains concentrated in high-cycle, rapid-charge, and long-life applications. Product development also emphasizes modular expansion, front service access, redundant control power, propagation mitigation, and verification under standards and test methods such as UL 1973, UL 9540A, and IEC 62619.

Drivers

New global data-center capacity, AI computing infrastructure, colocation expansion, and replacement of aging UPS batteries are the main procurement drivers. Compared with conventional lead-acid systems, lithium-ion racks can reduce battery-room area and structural loading, extend replacement intervals, and improve condition visibility and early fault detection through the BMS. High-power short-duration configurations complement fast generator takeover, flywheels, and longer-duration storage, making lithium-ion well suited to dense mission-critical loads.

Restraints

Initial investment remains materially higher than for lead-acid batteries, while projects also incur fire-protection engineering, insurance review, site certification, and operator-training costs. Charging profiles, DC voltage windows, and communication protocols vary among UPS platforms, limiting direct cross-brand replacement. Weak cell consistency, controller reliability, or thermal design can amplify system-level safety risk, and volatility in battery materials and high-power cell availability can affect delivery schedules and quotations.

Opportunities

Replacement of legacy lead-acid battery rooms, construction of AI data centers, compact edge facilities, and rapid deployment of modular data centers create the largest incremental opportunities. Cabinets with bidirectional power interfaces and dispatch capability may also support peak management, renewable smoothing, and grid-interactive UPS operation, although commercialization depends on control strategy, cycle-life warranties, and local electricity-market rules. Standard cabinet platforms

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combined with project-specific voltage, capacity, and communication options allow suppliers to balance manufacturing scale with customer customization.

Challenges

Suppliers must balance energy density, instantaneous power, thermal stability, service life, and cost while maintaining consistency and fault isolation across parallel cabinets. Safety incidents can materially change customer preferences and regulatory requirements, and data-center buyers have extremely low tolerance for downtime, resulting in long validation cycles and demanding liability management. As cell prices decline, competition will shift further toward BMS algorithms, system certification, UPS interoperability, delivery performance, and lifecycle service.

Industry Chain Analysis

Upstream inputs include LFP, NMC, and LTO cells; cathode and anode materials; electrolyte; separators; connectors; fuses; contactors; circuit breakers; sensors; control semiconductors; and fabricated enclosures. Midstream suppliers perform cell screening and grouping, module and pack engineering, DC bus and protection integration, BMS hardware and software development, thermal management, fire-system coordination, cabinet assembly, and safety testing, followed by validation of voltage, charging, communications, and fault logic with UPS manufacturers. Downstream purchasers include data-center operators, UPS vendors, engineering contractors, and power-system integrators. Cells represent the largest hardware cost, while safety engineering, certification, software control, project adaptation, and after-sales service create differentiated margin.

Segment Insights

By chemistry, LFP is gaining fastest in new projects and suits customers prioritizing safety, service life, and total cost of ownership. NMC retains stable demand in high-rate projects where floor space has high value, while LTO forms a smaller premium segment based on exceptional cycle life and rapid charging. By backup architecture, five-to-ten-minute high-power racks remain the mainstream configuration for centralized UPS systems; longer-duration designs generally require additional parallel cabinets and stronger thermal management. Higher-voltage DC platforms and greater cabinet-level power density can reduce buswork and cabling, but require more demanding insulation,

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interruption, and system coordination.

Downstream Market Opportunities

Hyperscale and colocation data centers are the principal purchasing groups, emphasizing repeatable platforms, rapid expansion, remote monitoring, and cross-region service. Enterprise data centers place more weight on compatibility with installed UPS equipment and retrofit cost, while edge and modular facilities favor compact, preassembled, and low-maintenance solutions. Telecom and network data centers require distributed deployment, environmental resilience, and remote operations, creating opportunities for smaller modular cabinets and staged expansion architectures.

Regional Insights

North America is a major high-value market, supported by AI data-center construction, battery replacement, and strict safety qualification. Asia-Pacific combines a deep cell and system manufacturing base with new demand from data-center investment in China, Southeast Asia, Japan, and South Korea. Europe places greater emphasis on efficiency, lifecycle cost, fire compliance, and battery regulation. Data-center campus and cloud-infrastructure projects create project-based demand in the Middle East, while adoption in other emerging regions depends more heavily on capital cost, service coverage, and local certification.

Competitive Landscape Analysis

The market includes global UPS and critical-power equipment groups, diversified battery manufacturers, and system suppliers specializing in data-center storage. UPS vendors control important project access through platform compatibility, channels, and service networks; battery companies hold advantages in cell technology, chemistry portfolios, and cost control; specialist system suppliers compete through flexible integration and local engineering response. Buyers typically evaluate safety-test history, scaled deployment references, BMS visibility, communication compatibility, multi-cabinet expansion, warranties, and field service, making cell price alone insufficient for durable differentiation.

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Report Scope

This report studies the global Lithium-Ion Battery Racks for Data Centers production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Lithium-Ion Battery Racks for Data Centers total production and demand, 2021-2032, (Units)

Global Lithium-Ion Battery Racks for Data Centers total production value, 2021-2032, (USD Million)

Global Lithium-Ion Battery Racks for Data Centers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Lithium-Ion Battery Racks for Data Centers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Lithium-Ion Battery Racks for Data Centers domestic production, consumption, key domestic manufacturers and share

Global Lithium-Ion Battery Racks for Data Centers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Lithium-Ion Battery Racks for Data Centers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Lithium-Ion Battery Racks for Data Centers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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This report profiles key players in the global Lithium-Ion Battery Racks for Data Centers 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 Vertiv, Schneider Electric, Eaton, Huawei Digital Power, Delta Electronics, Samsung SDI, LG Energy Solution, Saft, Riello UPS, Toshiba, 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 Lithium-Ion Battery Racks for Data Centers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) 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 Lithium-Ion Battery Racks for Data Centers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

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India

Rest of World

Market Segmentation

Global Lithium-Ion Battery Racks for Data Centers Market, Segmentation by Type:

Lithium Iron Phosphate (LFP)

Nickel Manganese Cobalt (NMC)

Lithium Titanate (LTO)

Other Lithium-Ion Chemistries

Global Lithium-Ion Battery Racks for Data Centers Market, Segmentation by Nominal DC Voltage:

Below 300 VDC

300 VDC to Below 500 VDC

500 VDC to Below 700 VDC

700 VDC and Above

Global Lithium-Ion Battery Racks for Data Centers Market, Segmentation by Usable Energy per Rack:

Below 25 kWh

25 kWh to Below 50 kWh

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50 kWh to Below 100 kWh

100 kWh and Above

Global Lithium-Ion Battery Racks for Data Centers Market, Segmentation by Rated Backup Duration:

Up to 5 Minutes

Above 5 Minutes and up to 10 Minutes

Above 10 Minutes and up to 30 Minutes

Above 30 Minutes

Global Lithium-Ion Battery Racks for Data Centers Market, Segmentation by Application:

Cloud and Internet Data Centers

Colocation Data Centers

Enterprise Data Centers

Telecom Data Centers

Government and Research Data Centers

Others

Companies Profiled:

Vertiv

Schneider Electric

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Eaton

Huawei Digital Power

Delta Electronics

Samsung SDI

LG Energy Solution

Saft

Riello UPS

Toshiba

EnerSys

Kehua Tech

KSTAR

Narada Power

Leoch

Key Questions Answered

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

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