

Global Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers market size was valued at US\$ 1296 million in 2025 and is forecast to a readjusted size of US\$ 3213 million by 2032 with a CAGR of 13.8% during review period.

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 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 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, 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.

Report Scope

This report is a detailed and comprehensive analysis for global Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithium-Ion Battery Racks for Data Centers market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithium-Ion Battery Racks for Data Centers market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithium-Ion Battery Racks for Data Centers market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 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 Lithium-Ion Battery Racks for Data Centers

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 Lithium-Ion Battery Racks for Data Centers 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 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.

Lithium-Ion Battery Racks for Data Centers 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

Lithium Iron Phosphate (LFP)

Nickel Manganese Cobalt (NMC)

Lithium Titanate (LTO)

Other Lithium-Ion Chemistries

Market segment by Nominal DC Voltage

Below 300 VDC

300 VDC to Below 500 VDC

500 VDC to Below 700 VDC

700 VDC and Above

Market segment by Usable Energy per Rack

Below 25 kWh

25 kWh to Below 50 kWh

50 kWh to Below 100 kWh

100 kWh and Above

Market segment 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

Market segment by Application

Cloud and Internet Data Centers

Colocation Data Centers

Enterprise Data Centers

Telecom Data Centers

Government and Research Data Centers

Others

Major players covered

Vertiv

Schneider Electric

Eaton

Huawei Digital Power

Delta Electronics

Samsung SDI

LG Energy Solution

Saft

Riello UPS

Toshiba

EnerSys

Kehua Tech

KSTAR

Narada Power

Leoch

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 Lithium-Ion Battery Racks for Data Centers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Lithium-Ion Battery Racks for Data Centers, with price, sales quantity, revenue, and global market share of Lithium-Ion Battery Racks for Data Centers from 2021 to 2026.

Chapter 3, the Lithium-Ion Battery Racks for Data Centers competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers.

Chapter 14 and 15, to describe Lithium-Ion Battery Racks for Data Centers sales

channel, distributors, customers, research findings and conclusion.

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