

Global Battery Backup Unit (BBU) Power Supply Market Growth 2025-2031

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Abstracts

The global Battery Backup Unit (BBU) Power Supply market size is predicted to grow from US\$ 1480 million in 2025 to US\$ 3110 million in 2031; it is expected to grow at a CAGR of 13.2% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

BBU (Battery Backup Unit) provides high energy density and high rate power supply through lithium batteries, and can maintain stability under instantaneous high power discharge. Compared with traditional UPS (Uninterruptible Power Supply), BBU has higher flexibility, conversion efficiency, service life, and smaller fault impact range.

Main driving factors:

1. The explosive demand for AI computing power drives the growth of the BBU market

The rapid development of artificial intelligence technology is reshaping the power demand structure of data centers. AI large model training and reasoning are highly dependent on GPU clusters, and the high power consumption characteristics of GPUs make power supply stability a key guarantee for the continuous operation of computing power. In 2024, the global AI computing power market size has reached 350 billion US dollars, a year-on-year increase of 45%. China's computing power scale has reached 246EFLOPS, accounting for 35% of the global total. This explosive growth has directly driven the increase in BBU market demand.

The yield rate and mass production of NVIDIA GB200 servers are important catalysts for the growth of the BBU market. The server is equipped with A100 Tensor Core GPU, providing up to 300 TFLOPS of floating-point computing power and power consumption of 1400W. In order to meet the extremely high requirements of AI servers for power stability, NVIDIA has listed BBU as a standard configuration for AI servers, rather than an option. Taking the NVL72 server as an example, an NVL72 needs to be equipped with 24 BBUs and 4 sets of BBSs. With the launch of new-generation AI servers such as NVIDIA GB300, BBU usage is expected to increase by more than 50%, and the value of a single BBU will also increase from US\$300-400 to a higher level.

BBU plays an irreplaceable role in AI data centers. When the main power supply is interrupted or insufficient, the BBU battery can quickly take over the power supply, ensuring that the system has enough time to save important data and transfer operations to other servers, thereby protecting data security in the data center and improving system stability and reliability. In practical applications, BBU can make up for the shortcomings of supercapacitors with high-speed response but poor sustainability, as well as the slow response of UPS and diesel generators, and achieve the advantages of second-level response and strong sustainability.

2. Cloud computing expansion and accelerated data center construction The cloud computing market continues to grow rapidly, providing a broad application scenario for BBU. In 2023, the scale of China's cloud computing market will reach 616.5 billion yuan, a year-on-year increase of 35.5%, and is expected to exceed 2.1 trillion yuan in 2027. The scale of the global cloud computing market will be US\$586.4 billion in 2023, a year-on-year increase of 19.4%, and is expected to exceed US\$1 trillion in 2027. This growth trend has directly led to the expansion of the scale of data center construction, which in turn has increased the demand for backup power supplies.

The high energy consumption characteristics of data centers have increased their requirements for power stability. The power consumption of a single cabinet in a traditional data center is usually 2-8KW, while the power consumption of a single cabinet in an intelligent computing center has reached 20-50KW, and is expected to reach 100KW or even higher in the future. At the same time, the intelligent computing center presents significant dynamic load characteristics, which are manifested as periodicity, high-amplitude fluctuations, multi-task concurrency and instantaneous high-load shocks. Such dynamic characteristics put forward higher adaptability requirements for the power supply system. To solve this problem, the power energy system that matches the infrastructure needs of the intelligent computing center has become a key consideration, among which backup power supplies are a key component.

The 'East Data West Computing' project provides policy support and investment opportunities for the BBU market. The total investment of the project exceeds 400 billion yuan, which will guide the computing power demand in the east to the west in an orderly manner, optimize the layout of data center construction, and promote coordinated linkage between the east and the west. The proportion of data centers in the western region has steadily increased, and the national computing power structure has been gradually optimized, while the stability of the power grid in the western region is relatively low, which makes the demand for BBU in western data centers more urgent. At the same time, the project emphasizes green and low-carbon development, requiring that the PUE of data centers be reduced to below 1.5 by 2025, and that the utilization rate of renewable energy increase by 10% annually. These requirements indirectly promote the application of efficient BBU technology.

3. Lithium battery replacement and intelligent management technology upgrade.

Lithium battery replacement of lead-acid batteries is the core technology driver for the growth of the BBU market. Lithium batteries have significant advantages in energy density, cycle life and space utilization. Although the initial cost is higher, the cost of the entire life cycle is lower. Specifically, the energy density of lithium batteries is 3-6 times that of lead-acid batteries, and the cycle life is 1500-3000 times, while lead-acid batteries are only 300-500 times. Within a 5-year service life, the total cost of lithium batteries (2850 yuan) is lower than that of lead-acid batteries (3585 yuan), mainly due to lower maintenance costs and longer service life.

Intelligent management technology provides BBU with higher safety and efficiency. Modern BBU integrates an advanced battery management system (BMS) that can monitor battery status in real time, optimize the charging and discharging process, and reduce downtime through predictive maintenance. For example, Huasu Technology's BMS battery monitoring system has been applied to ByteDance's computing center. Through the intelligent power management unit (iDMU) branch metering and precise power preparation, it avoids tenant power disputes and saves 40% of battery configuration. At the same time, BMS can also save electricity bills by taking advantage of the difference between peak and valley electricity prices. A company deployed an intelligent management system to realize battery charging during valley electricity price periods and battery discharge during peak electricity price periods, reducing the average electricity bill of the site from 28.6 yuan/day to 23.7 yuan/day, saving 17.1%.

The combination of liquid cooling technology and BBU further enhances its application

value in high-density data centers. The immersion liquid-cooled BBU can increase heat dissipation efficiency by 100%, reduce energy consumption in the computer room by 21.6%, extend battery life, and reduce noise pollution. The BBU wind-liquid hybrid heat dissipation commercial pilot completed by Shandong Mobile and ZTE shows that after the computer room renovation, the total energy consumption is reduced by 18.27%, the PUE is reduced by 21.64%, and a single computer room saves more than 6,000 kWh of electricity per year, reducing 4.7 tons of carbon dioxide emissions per year. This technical synergy makes BBU play an increasingly important role in the construction of green data centers.

4. Optimization of policy environment and changes in market structure

The optimization of policy environment provides strong support for the BBU market. China's 'Special Action Plan for Green and Low-carbon Development of Data Centers' requires that the average power utilization efficiency of data centers nationwide be reduced to below 1.5 by the end of 2025, and the utilization rate of renewable energy will increase by 10% annually, which will prompt data center operators to adopt more efficient backup power solutions. At the same time, the EU has passed the ErP Lot 6 certification requiring the standby power consumption of power supply equipment to be $\leq 0.1W$, which promotes the use of low-power design for BBU. The Ministry of Finance's server procurement standards also clearly require RAID cards to support BBU units, indicating that government projects have increased the reliability requirements for BBU.

The development of microgrids and virtual power plants provides new application scenarios for BBU. The National Energy Administration issued the 'Notice on Several Measures to Promote the Development of Private Economy in the Energy Field', supporting private enterprises to invest in new energy storage, virtual power plants, smart microgrids and other new energy technologies, new formats and new models. Anhui Province's policies also encourage the creation of innovative application scenarios around virtual power plants, smart microgrids and other directions, and provide policy rewards. These policy supports give BBU a broader development space in distributed energy systems and microgrid applications.

5.Changes in market structure provide new growth opportunities for BBU companies. The traditional BBU market is mainly dominated by Japanese and Korean battery companies such as Samsung and LG, accounting for about 60% of the market share. However, while Chinese companies have reached the level of overseas companies in terms of product quality, their prices are 20% lower, and they are expected to achieve domestic substitution. For example, Weilan Lithium Core has supplied batteries to BBU

manufacturers such as AES-KY, Shunda, and Xinshengli, and sent samples to companies such as Delta and Lite-On. It is expected to launch the next generation of BBU batteries in 2025. This change in market structure provides important development opportunities for domestic BBU companies.

6. Development prospects of BBU as a segment of energy storage market

BBU can be regarded as an important segment of energy storage, especially in small or distributed applications that require high reliability and fast response. Compared with traditional UPS, BBU has many advantages, including higher power conversion efficiency, longer service life, and smaller scope of fault impact. BBU adopts a distributed architecture and can be directly embedded in the server cabinet without the need for a dedicated computer room. It has more efficient space utilization and is more suitable for compact AI data centers.

The global BBU battery market size is US\$55.7 million in 2024 and is expected to reach US\$88.2 million in 2031, with a compound annual growth rate of approximately 6.8%. Although the market size is relatively small, it has huge growth potential. Taking NVIDIA GB200 server as an example, one NVL36 requires 1,200 batteries and one NVL72 requires 2,400 batteries. The corresponding BBU battery profit increment in 2025 alone is about 800 million yuan. With the launch of a new generation of AI servers such as NVIDIA GB300, BBU usage is expected to increase by more than 50%.

BBU technology is developing towards intelligence, miniaturization, and efficiency. For example, supercapacitors are introduced as instantaneous response components to improve system reliability and reaction speed; full-pole ear technology is used to improve battery performance and extend service life; and liquid cooling systems are used to improve heat dissipation performance and reduce energy consumption. These technological advances will further enhance the competitiveness of BBU in the energy storage market segment.

LP Information, Inc. (LPI) ' newest research report, the "Battery Backup Unit (BBU) Power Supply Industry Forecast" looks at past sales and reviews total world Battery Backup Unit (BBU) Power Supply sales in 2024, providing a comprehensive analysis by region and market sector of projected Battery Backup Unit (BBU) Power Supply sales for 2025 through 2031. With Battery Backup Unit (BBU) Power Supply sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Battery Backup Unit (BBU) Power Supply industry.

This Insight Report provides a comprehensive analysis of the global Battery Backup Unit (BBU) Power Supply landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Battery Backup Unit (BBU) Power Supply portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Battery Backup Unit (BBU) Power Supply market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Battery Backup Unit (BBU) Power Supply and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Battery Backup Unit (BBU) Power Supply.

This report presents a comprehensive overview, market shares, and growth opportunities of Battery Backup Unit (BBU) Power Supply market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Less Than 250W

250-500W

500-1000W

1000-2000W

2000-3000W

Above 3000W

Segmentation by Application:

Data Center and Telecommunications

Security and Surveillance

Industrial

Medical

Hotel and Retail

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Honeywell

Bender

Delta Electronics

Atemitech

Electric Fuel (Arotech Corporation)

Westell

FSP Group

AES-KY

Dynapack

STL Technology

LITE-ON TECHNOLOGY

Power Tank Energy

Simplo

Jiangsu Azure Corporation

Beijing SOJO Electric

Liaoning Shidai Wanheng

Zhejiang Narada Power Source

Shenzhen VAPEL Power Supply Technology

Sunwoda Electronic

Key Questions Addressed in this Report

What is the 10-year outlook for the global Battery Backup Unit (BBU) Power Supply market?

What factors are driving Battery Backup Unit (BBU) Power Supply market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Battery Backup Unit (BBU) Power Supply market opportunities vary by end market size?

How does Battery Backup Unit (BBU) Power Supply break out by Type, by Application?

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