

Global Lithium-Ion Battery Racks for Data Centers Market Growth 2026-2032

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Abstracts

The global Lithium-Ion Battery Racks for Data Centers market size is predicted to grow from US\$ 1233 million in 2025 to US\$ 3195 million in 2032; it is expected to grow at a CAGR of 14.6% from 2026 to 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 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

LP Information, Inc. (LPI) ' newest research report, the "Lithium-Ion Battery Racks for Data Centers Industry Forecast" looks at past sales and reviews total world Lithium-Ion Battery Racks for Data Centers sales in 2025, providing a comprehensive analysis by region and market sector of projected Lithium-Ion Battery Racks for Data Centers sales for 2026 through 2032. With Lithium-Ion Battery Racks for Data Centers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Lithium-Ion Battery Racks for Data Centers industry.

This Insight Report provides a comprehensive analysis of the global Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Lithium-Ion Battery Racks for Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Lithium-Ion Battery Racks for Data Centers 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 Lithium-Ion Battery Racks for Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of Lithium-Ion Battery Racks for Data Centers market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Lithium Iron Phosphate (LFP)

Nickel Manganese Cobalt (NMC)

Lithium Titanate (LTO)

Other Lithium-Ion Chemistries

Segmentation by Nominal DC Voltage:

Below 300 VDC

300 VDC to Below 500 VDC

500 VDC to Below 700 VDC

700 VDC and Above

Segmentation by Usable Energy per Rack:

Below 25 kWh

25 kWh to Below 50 kWh

50 kWh to Below 100 kWh

100 kWh and Above

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

Segmentation by Application:

Cloud and Internet Data Centers

Colocation Data Centers

Enterprise Data Centers

Telecom Data Centers

Government and Research Data Centers

Others

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Lithium-Ion Battery Racks for Data Centers market?

What factors are driving Lithium-Ion Battery Racks for Data Centers market growth, globally and by region?

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

How do Lithium-Ion Battery Racks for Data Centers market opportunities vary by end market size?

How does Lithium-Ion Battery Racks for Data Centers break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Lithium-Ion Battery Racks for Data Centers Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Lithium-Ion Battery Racks for Data Centers by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Lithium-Ion Battery Racks for Data Centers by Country/Region, 2021, 2025 & 2032

2.2 Lithium-Ion Battery Racks for Data Centers Segment by Type

- 2.2.1 Lithium Iron Phosphate (LFP)
- 2.2.2 Nickel Manganese Cobalt (NMC)
- 2.2.3 Lithium Titanate (LTO)
- 2.2.4 Other Lithium-Ion Chemistries
- 2.2.5 Lithium-Ion Battery Racks for Data Centers Sales by Type
 - 2.2.5.1 Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Lithium-Ion Battery Racks for Data Centers Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Type (2021-2026)

2.3 Lithium-Ion Battery Racks for Data Centers Segment by Nominal DC Voltage

- 2.3.1 Below 300 VDC
- 2.3.2 300 VDC to Below 500 VDC
- 2.3.3 500 VDC to Below 700 VDC
- 2.3.4 700 VDC and Above
- 2.3.5 Lithium-Ion Battery Racks for Data Centers Sales by Nominal DC Voltage

2.3.5.1 Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Nominal DC Voltage (2021-2026)

2.3.5.2 Global Lithium-Ion Battery Racks for Data Centers Revenue and Market Share by Nominal DC Voltage (2021-2026)

2.3.5.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Nominal DC Voltage (2021-2026)

2.4 Lithium-Ion Battery Racks for Data Centers Segment by Usable Energy per Rack

2.4.1 Below 25 kWh

2.4.2 25 kWh to Below 50 kWh

2.4.3 50 kWh to Below 100 kWh

2.4.4 100 kWh and Above

2.4.5 Lithium-Ion Battery Racks for Data Centers Sales by Usable Energy per Rack

2.4.5.1 Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Usable Energy per Rack (2021-2026)

2.4.5.2 Global Lithium-Ion Battery Racks for Data Centers Revenue and Market Share by Usable Energy per Rack (2021-2026)

2.4.5.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Usable Energy per Rack (2021-2026)

2.5 Lithium-Ion Battery Racks for Data Centers Segment by Rated Backup Duration

2.5.1 Up to 5 Minutes

2.5.2 Above 5 Minutes and up to 10 Minutes

2.5.3 Above 10 Minutes and up to 30 Minutes

2.5.4 Above 30 Minutes

2.5.5 Lithium-Ion Battery Racks for Data Centers Sales by Rated Backup Duration

2.5.5.1 Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Rated Backup Duration (2021-2026)

2.5.5.2 Global Lithium-Ion Battery Racks for Data Centers Revenue and Market Share by Rated Backup Duration (2021-2026)

2.5.5.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Rated Backup Duration (2021-2026)

2.6 Lithium-Ion Battery Racks for Data Centers Segment by Application

2.6.1 Cloud and Internet Data Centers

2.6.2 Colocation Data Centers

2.6.3 Enterprise Data Centers

2.6.4 Telecom Data Centers

2.6.5 Government and Research Data Centers

2.6.6 Others

2.6.7 Lithium-Ion Battery Racks for Data Centers Sales by Application

2.6.7.1 Global Lithium-Ion Battery Racks for Data Centers Sale Market Share by

Application (2021-2026)

2.6.7.2 Global Lithium-Ion Battery Racks for Data Centers Revenue and Market Share by Application (2021-2026)

2.6.7.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Lithium-Ion Battery Racks for Data Centers Breakdown Data by Company

3.1.1 Global Lithium-Ion Battery Racks for Data Centers Annual Sales by Company (2021-2026)

3.1.2 Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Company (2021-2026)

3.2 Global Lithium-Ion Battery Racks for Data Centers Annual Revenue by Company (2021-2026)

3.2.1 Global Lithium-Ion Battery Racks for Data Centers Revenue by Company (2021-2026)

3.2.2 Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Company (2021-2026)

3.3 Global Lithium-Ion Battery Racks for Data Centers Sale Price by Company

3.4 Key Manufacturers Lithium-Ion Battery Racks for Data Centers Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Lithium-Ion Battery Racks for Data Centers Product Location Distribution

3.4.2 Players Lithium-Ion Battery Racks for Data Centers Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR LITHIUM-ION BATTERY RACKS FOR DATA CENTERS BY GEOGRAPHIC REGION

4.1 World Historic Lithium-Ion Battery Racks for Data Centers Market Size by Geographic Region (2021-2026)

4.1.1 Global Lithium-Ion Battery Racks for Data Centers Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Lithium-Ion Battery Racks for Data Centers Annual Revenue by

Geographic Region (2021-2026)

4.2 World Historic Lithium-Ion Battery Racks for Data Centers Market Size by Country/Region (2021-2026)

4.2.1 Global Lithium-Ion Battery Racks for Data Centers Annual Sales by Country/Region (2021-2026)

4.2.2 Global Lithium-Ion Battery Racks for Data Centers Annual Revenue by Country/Region (2021-2026)

4.3 Americas Lithium-Ion Battery Racks for Data Centers Sales Growth

4.4 APAC Lithium-Ion Battery Racks for Data Centers Sales Growth

4.5 Europe Lithium-Ion Battery Racks for Data Centers Sales Growth

4.6 Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales Growth

5 AMERICAS

5.1 Americas Lithium-Ion Battery Racks for Data Centers Sales by Country

5.1.1 Americas Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026)

5.1.2 Americas Lithium-Ion Battery Racks for Data Centers Revenue by Country (2021-2026)

5.2 Americas Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026)

5.3 Americas Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Lithium-Ion Battery Racks for Data Centers Sales by Region

6.1.1 APAC Lithium-Ion Battery Racks for Data Centers Sales by Region (2021-2026)

6.1.2 APAC Lithium-Ion Battery Racks for Data Centers Revenue by Region (2021-2026)

6.2 APAC Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026)

6.3 APAC Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Lithium-Ion Battery Racks for Data Centers by Country
 - 7.1.1 Europe Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026)
 - 7.1.2 Europe Lithium-Ion Battery Racks for Data Centers Revenue by Country (2021-2026)
- 7.2 Europe Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026)
- 7.3 Europe Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Lithium-Ion Battery Racks for Data Centers by Country
 - 8.1.1 Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Lithium-Ion Battery Racks for Data Centers Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026)
- 8.3 Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Lithium-Ion Battery Racks for Data Centers

10.3 Manufacturing Process Analysis of Lithium-Ion Battery Racks for Data Centers

10.4 Industry Chain Structure of Lithium-Ion Battery Racks for Data Centers

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Lithium-Ion Battery Racks for Data Centers Distributors

11.3 Lithium-Ion Battery Racks for Data Centers Customer

12 WORLD FORECAST REVIEW FOR LITHIUM-ION BATTERY RACKS FOR DATA CENTERS BY GEOGRAPHIC REGION

12.1 Global Lithium-Ion Battery Racks for Data Centers Market Size Forecast by Region

12.1.1 Global Lithium-Ion Battery Racks for Data Centers Forecast by Region (2027-2032)

12.1.2 Global Lithium-Ion Battery Racks for Data Centers Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Lithium-Ion Battery Racks for Data Centers Forecast by Type (2027-2032)

12.7 Global Lithium-Ion Battery Racks for Data Centers Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Vertiv

- 13.1.1 Vertiv Company Information
- 13.1.2 Vertiv Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
- 13.1.3 Vertiv Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Vertiv Main Business Overview
- 13.1.5 Vertiv Latest Developments
- 13.2 Schneider Electric
 - 13.2.1 Schneider Electric Company Information
 - 13.2.2 Schneider Electric Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.2.3 Schneider Electric Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Schneider Electric Main Business Overview
 - 13.2.5 Schneider Electric Latest Developments
- 13.3 Eaton
 - 13.3.1 Eaton Company Information
 - 13.3.2 Eaton Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.3.3 Eaton Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Eaton Main Business Overview
 - 13.3.5 Eaton Latest Developments
- 13.4 Huawei Digital Power
 - 13.4.1 Huawei Digital Power Company Information
 - 13.4.2 Huawei Digital Power Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.4.3 Huawei Digital Power Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Huawei Digital Power Main Business Overview
 - 13.4.5 Huawei Digital Power Latest Developments
- 13.5 Delta Electronics
 - 13.5.1 Delta Electronics Company Information
 - 13.5.2 Delta Electronics Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.5.3 Delta Electronics Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Delta Electronics Main Business Overview
 - 13.5.5 Delta Electronics Latest Developments

13.6 Samsung SDI

13.6.1 Samsung SDI Company Information

13.6.2 Samsung SDI Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

13.6.3 Samsung SDI Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Samsung SDI Main Business Overview

13.6.5 Samsung SDI Latest Developments

13.7 LG Energy Solution

13.7.1 LG Energy Solution Company Information

13.7.2 LG Energy Solution Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

13.7.3 LG Energy Solution Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 LG Energy Solution Main Business Overview

13.7.5 LG Energy Solution Latest Developments

13.8 Saft

13.8.1 Saft Company Information

13.8.2 Saft Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

13.8.3 Saft Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Saft Main Business Overview

13.8.5 Saft Latest Developments

13.9 Riello UPS

13.9.1 Riello UPS Company Information

13.9.2 Riello UPS Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

13.9.3 Riello UPS Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Riello UPS Main Business Overview

13.9.5 Riello UPS Latest Developments

13.10 Toshiba

13.10.1 Toshiba Company Information

13.10.2 Toshiba Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

13.10.3 Toshiba Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Toshiba Main Business Overview

- 13.10.5 Toshiba Latest Developments
- 13.11 EnerSys
 - 13.11.1 EnerSys Company Information
 - 13.11.2 EnerSys Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.11.3 EnerSys Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 EnerSys Main Business Overview
 - 13.11.5 EnerSys Latest Developments
- 13.12 Kehua Tech
 - 13.12.1 Kehua Tech Company Information
 - 13.12.2 Kehua Tech Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.12.3 Kehua Tech Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Kehua Tech Main Business Overview
 - 13.12.5 Kehua Tech Latest Developments
- 13.13 KSTAR
 - 13.13.1 KSTAR Company Information
 - 13.13.2 KSTAR Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.13.3 KSTAR Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 KSTAR Main Business Overview
 - 13.13.5 KSTAR Latest Developments
- 13.14 Narada Power
 - 13.14.1 Narada Power Company Information
 - 13.14.2 Narada Power Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.14.3 Narada Power Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Narada Power Main Business Overview
 - 13.14.5 Narada Power Latest Developments
- 13.15 Leoch
 - 13.15.1 Leoch Company Information
 - 13.15.2 Leoch Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications
 - 13.15.3 Leoch Lithium-Ion Battery Racks for Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Leoch Main Business Overview

13.15.5 Leoch Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Lithium-Ion Battery Racks for Data Centers Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Lithium-Ion Battery Racks for Data Centers Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Lithium Iron Phosphate (LFP)
- Table 4. Major Players of Nickel Manganese Cobalt (NMC)
- Table 5. Major Players of Lithium Titanate (LTO)
- Table 6. Major Players of Other Lithium-Ion Chemistries
- Table 7. Global Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026) & (Units)
- Table 8. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)
- Table 9. Global Lithium-Ion Battery Racks for Data Centers Revenue by Type (2021-2026) & (\$ million)
- Table 10. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Type (2021-2026)
- Table 11. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 12. Major Players of Below 300 VDC
- Table 13. Major Players of 300 VDC to Below 500 VDC
- Table 14. Major Players of 500 VDC to Below 700 VDC
- Table 15. Major Players of 700 VDC and Above
- Table 16. Global Lithium-Ion Battery Racks for Data Centers Sales by Nominal DC Voltage (2021-2026) & (Units)
- Table 17. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Nominal DC Voltage (2021-2026)
- Table 18. Global Lithium-Ion Battery Racks for Data Centers Revenue by Nominal DC Voltage (2021-2026) & (\$ million)
- Table 19. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Nominal DC Voltage (2021-2026)
- Table 20. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Nominal DC Voltage (2021-2026) & (US\$/Unit)
- Table 21. Major Players of Below 25 kWh
- Table 22. Major Players of 25 kWh to Below 50 kWh
- Table 23. Major Players of 50 kWh to Below 100 kWh

Table 24. Major Players of 100 kWh and Above

Table 25. Global Lithium-Ion Battery Racks for Data Centers Sales by Usable Energy per Rack (2021-2026) & (Units)

Table 26. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Usable Energy per Rack (2021-2026)

Table 27. Global Lithium-Ion Battery Racks for Data Centers Revenue by Usable Energy per Rack (2021-2026) & (\$ million)

Table 28. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Usable Energy per Rack (2021-2026)

Table 29. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Usable Energy per Rack (2021-2026) & (US\$/Unit)

Table 30. Major Players of Up to 5 Minutes

Table 31. Major Players of Above 5 Minutes and up to 10 Minutes

Table 32. Major Players of Above 10 Minutes and up to 30 Minutes

Table 33. Major Players of Above 30 Minutes

Table 34. Global Lithium-Ion Battery Racks for Data Centers Sales by Rated Backup Duration (2021-2026) & (Units)

Table 35. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Rated Backup Duration (2021-2026)

Table 36. Global Lithium-Ion Battery Racks for Data Centers Revenue by Rated Backup Duration (2021-2026) & (\$ million)

Table 37. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Rated Backup Duration (2021-2026)

Table 38. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Rated Backup Duration (2021-2026) & (US\$/Unit)

Table 39. Global Lithium-Ion Battery Racks for Data Centers Sale by Application (2021-2026) & (Units)

Table 40. Global Lithium-Ion Battery Racks for Data Centers Sale Market Share by Application (2021-2026)

Table 41. Global Lithium-Ion Battery Racks for Data Centers Revenue by Application (2021-2026) & (\$ million)

Table 42. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Application (2021-2026)

Table 43. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Application (2021-2026) & (US\$/Unit)

Table 44. Global Lithium-Ion Battery Racks for Data Centers Sales by Company (2021-2026) & (Units)

Table 45. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Company (2021-2026)

Table 46. Global Lithium-Ion Battery Racks for Data Centers Revenue by Company (2021-2026) & (\$ millions)

Table 47. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Company (2021-2026)

Table 48. Global Lithium-Ion Battery Racks for Data Centers Sale Price by Company (2021-2026) & (US\$/Unit)

Table 49. Key Manufacturers Lithium-Ion Battery Racks for Data Centers Producing Area Distribution and Sales Area

Table 50. Players Lithium-Ion Battery Racks for Data Centers Products Offered

Table 51. Lithium-Ion Battery Racks for Data Centers Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 52. New Products and Potential Entrants

Table 53. Market M&A Activity & Strategy

Table 54. Global Lithium-Ion Battery Racks for Data Centers Sales by Geographic Region (2021-2026) & (Units)

Table 55. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share Geographic Region (2021-2026)

Table 56. Global Lithium-Ion Battery Racks for Data Centers Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 57. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Geographic Region (2021-2026)

Table 58. Global Lithium-Ion Battery Racks for Data Centers Sales by Country/Region (2021-2026) & (Units)

Table 59. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country/Region (2021-2026)

Table 60. Global Lithium-Ion Battery Racks for Data Centers Revenue by Country/Region (2021-2026) & (\$ millions)

Table 61. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Country/Region (2021-2026)

Table 62. Americas Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026) & (Units)

Table 63. Americas Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country (2021-2026)

Table 64. Americas Lithium-Ion Battery Racks for Data Centers Revenue by Country (2021-2026) & (\$ millions)

Table 65. Americas Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026) & (Units)

Table 66. Americas Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026) & (Units)

Table 67. APAC Lithium-Ion Battery Racks for Data Centers Sales by Region (2021-2026) & (Units)
Table 68. APAC Lithium-Ion Battery Racks for Data Centers Sales Market Share by Region (2021-2026)
Table 69. APAC Lithium-Ion Battery Racks for Data Centers Revenue by Region (2021-2026) & (\$ millions)
Table 70. APAC Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026) & (Units)
Table 71. APAC Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026) & (Units)
Table 72. Europe Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026) & (Units)
Table 73. Europe Lithium-Ion Battery Racks for Data Centers Revenue by Country (2021-2026) & (\$ millions)
Table 74. Europe Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026) & (Units)
Table 75. Europe Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026) & (Units)
Table 76. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Country (2021-2026) & (Units)
Table 77. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Country (2021-2026)
Table 78. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Type (2021-2026) & (Units)
Table 79. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales by Application (2021-2026) & (Units)
Table 80. Key Market Drivers & Growth Opportunities of Lithium-Ion Battery Racks for Data Centers
Table 81. Key Market Challenges & Risks of Lithium-Ion Battery Racks for Data Centers
Table 82. Key Industry Trends of Lithium-Ion Battery Racks for Data Centers
Table 83. Lithium-Ion Battery Racks for Data Centers Raw Material
Table 84. Key Suppliers of Raw Materials
Table 85. Lithium-Ion Battery Racks for Data Centers Distributors List
Table 86. Lithium-Ion Battery Racks for Data Centers Customer List
Table 87. Global Lithium-Ion Battery Racks for Data Centers Sales Forecast by Region (2027-2032) & (Units)
Table 88. Global Lithium-Ion Battery Racks for Data Centers Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 89. Americas Lithium-Ion Battery Racks for Data Centers Sales Forecast by

Country (2027-2032) & (Units)

Table 90. Americas Lithium-Ion Battery Racks for Data Centers Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. APAC Lithium-Ion Battery Racks for Data Centers Sales Forecast by Region (2027-2032) & (Units)

Table 92. APAC Lithium-Ion Battery Racks for Data Centers Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 93. Europe Lithium-Ion Battery Racks for Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 94. Europe Lithium-Ion Battery Racks for Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 95. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 96. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 97. Global Lithium-Ion Battery Racks for Data Centers Sales Forecast by Type (2027-2032) & (Units)

Table 98. Global Lithium-Ion Battery Racks for Data Centers Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 99. Global Lithium-Ion Battery Racks for Data Centers Sales Forecast by Application (2027-2032) & (Units)

Table 100. Global Lithium-Ion Battery Racks for Data Centers Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 101. Vertiv Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 102. Vertiv Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 103. Vertiv Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Vertiv Main Business

Table 105. Vertiv Latest Developments

Table 106. Schneider Electric Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 107. Schneider Electric Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 108. Schneider Electric Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. Schneider Electric Main Business

Table 110. Schneider Electric Latest Developments

Table 111. Eaton Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 112. Eaton Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 113. Eaton Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. Eaton Main Business

Table 115. Eaton Latest Developments

Table 116. Huawei Digital Power Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 117. Huawei Digital Power Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 118. Huawei Digital Power Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. Huawei Digital Power Main Business

Table 120. Huawei Digital Power Latest Developments

Table 121. Delta Electronics Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 122. Delta Electronics Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 123. Delta Electronics Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Delta Electronics Main Business

Table 125. Delta Electronics Latest Developments

Table 126. Samsung SDI Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 127. Samsung SDI Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 128. Samsung SDI Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. Samsung SDI Main Business

Table 130. Samsung SDI Latest Developments

Table 131. LG Energy Solution Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 132. LG Energy Solution Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 133. LG Energy Solution Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. LG Energy Solution Main Business

Table 135. LG Energy Solution Latest Developments

Table 136. Saft Basic Information, Lithium-Ion Battery Racks for Data Centers
Manufacturing Base, Sales Area and Its Competitors

Table 137. Saft Lithium-Ion Battery Racks for Data Centers Product Portfolios and
Specifications

Table 138. Saft Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$
Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Saft Main Business

Table 140. Saft Latest Developments

Table 141. Riello UPS Basic Information, Lithium-Ion Battery Racks for Data Centers
Manufacturing Base, Sales Area and Its Competitors

Table 142. Riello UPS Lithium-Ion Battery Racks for Data Centers Product Portfolios
and Specifications

Table 143. Riello UPS Lithium-Ion Battery Racks for Data Centers Sales (Units),
Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. Riello UPS Main Business

Table 145. Riello UPS Latest Developments

Table 146. Toshiba Basic Information, Lithium-Ion Battery Racks for Data Centers
Manufacturing Base, Sales Area and Its Competitors

Table 147. Toshiba Lithium-Ion Battery Racks for Data Centers Product Portfolios and
Specifications

Table 148. Toshiba Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue
(\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 149. Toshiba Main Business

Table 150. Toshiba Latest Developments

Table 151. EnerSys Basic Information, Lithium-Ion Battery Racks for Data Centers
Manufacturing Base, Sales Area and Its Competitors

Table 152. EnerSys Lithium-Ion Battery Racks for Data Centers Product Portfolios and
Specifications

Table 153. EnerSys Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue
(\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 154. EnerSys Main Business

Table 155. EnerSys Latest Developments

Table 156. Kehua Tech Basic Information, Lithium-Ion Battery Racks for Data Centers
Manufacturing Base, Sales Area and Its Competitors

Table 157. Kehua Tech Lithium-Ion Battery Racks for Data Centers Product Portfolios
and Specifications

Table 158. Kehua Tech Lithium-Ion Battery Racks for Data Centers Sales (Units),
Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 159. Kehua Tech Main Business

Table 160. Kehua Tech Latest Developments

Table 161. KSTAR Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 162. KSTAR Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 163. KSTAR Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 164. KSTAR Main Business

Table 165. KSTAR Latest Developments

Table 166. Narada Power Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 167. Narada Power Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 168. Narada Power Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 169. Narada Power Main Business

Table 170. Narada Power Latest Developments

Table 171. Leoch Basic Information, Lithium-Ion Battery Racks for Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 172. Leoch Lithium-Ion Battery Racks for Data Centers Product Portfolios and Specifications

Table 173. Leoch Lithium-Ion Battery Racks for Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 174. Leoch Main Business

Table 175. Leoch Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Lithium-Ion Battery Racks for Data Centers
- Figure 2. Lithium-Ion Battery Racks for Data Centers Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Lithium-Ion Battery Racks for Data Centers Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Lithium-Ion Battery Racks for Data Centers Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Lithium-Ion Battery Racks for Data Centers Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country/Region (2025)
- Figure 10. Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Lithium Iron Phosphate (LFP)
- Figure 12. Product Picture of Nickel Manganese Cobalt (NMC)
- Figure 13. Product Picture of Lithium Titanate (LTO)
- Figure 14. Product Picture of Other Lithium-Ion Chemistries
- Figure 15. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type in 2026
- Figure 16. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Below 300 VDC
- Figure 18. Product Picture of 300 VDC to Below 500 VDC
- Figure 19. Product Picture of 500 VDC to Below 700 VDC
- Figure 20. Product Picture of 700 VDC and Above
- Figure 21. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Nominal DC Voltage in 2026
- Figure 22. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Nominal DC Voltage (2021-2026)
- Figure 23. Product Picture of Below 25 kWh
- Figure 24. Product Picture of 25 kWh to Below 50 kWh
- Figure 25. Product Picture of 50 kWh to Below 100 kWh
- Figure 26. Product Picture of 100 kWh and Above

Figure 27. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Usable Energy per Rack in 2026

Figure 28. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Usable Energy per Rack (2021-2026)

Figure 29. Product Picture of Up to 5 Minutes

Figure 30. Product Picture of Above 5 Minutes and up to 10 Minutes

Figure 31. Product Picture of Above 10 Minutes and up to 30 Minutes

Figure 32. Product Picture of Above 30 Minutes

Figure 33. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Rated Backup Duration in 2026

Figure 34. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Rated Backup Duration (2021-2026)

Figure 35. Lithium-Ion Battery Racks for Data Centers Consumed in Cloud and Internet Data Centers

Figure 36. Global Lithium-Ion Battery Racks for Data Centers Market: Cloud and Internet Data Centers (2021-2026) & (Units)

Figure 37. Lithium-Ion Battery Racks for Data Centers Consumed in Colocation Data Centers

Figure 38. Global Lithium-Ion Battery Racks for Data Centers Market: Colocation Data Centers (2021-2026) & (Units)

Figure 39. Lithium-Ion Battery Racks for Data Centers Consumed in Enterprise Data Centers

Figure 40. Global Lithium-Ion Battery Racks for Data Centers Market: Enterprise Data Centers (2021-2026) & (Units)

Figure 41. Lithium-Ion Battery Racks for Data Centers Consumed in Telecom Data Centers

Figure 42. Global Lithium-Ion Battery Racks for Data Centers Market: Telecom Data Centers (2021-2026) & (Units)

Figure 43. Lithium-Ion Battery Racks for Data Centers Consumed in Government and Research Data Centers

Figure 44. Global Lithium-Ion Battery Racks for Data Centers Market: Government and Research Data Centers (2021-2026) & (Units)

Figure 45. Lithium-Ion Battery Racks for Data Centers Consumed in Others

Figure 46. Global Lithium-Ion Battery Racks for Data Centers Market: Others (2021-2026) & (Units)

Figure 47. Global Lithium-Ion Battery Racks for Data Centers Sale Market Share by Application (2025)

Figure 48. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Application in 2025

Figure 49. Lithium-Ion Battery Racks for Data Centers Sales by Company in 2025 (Units)

Figure 50. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Company in 2025

Figure 51. Lithium-Ion Battery Racks for Data Centers Revenue by Company in 2025 (\$ millions)

Figure 52. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Company in 2025

Figure 53. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share by Geographic Region (2021-2026)

Figure 54. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Geographic Region in 2025

Figure 55. Americas Lithium-Ion Battery Racks for Data Centers Sales 2021-2026 (Units)

Figure 56. Americas Lithium-Ion Battery Racks for Data Centers Revenue 2021-2026 (\$ millions)

Figure 57. APAC Lithium-Ion Battery Racks for Data Centers Sales 2021-2026 (Units)

Figure 58. APAC Lithium-Ion Battery Racks for Data Centers Revenue 2021-2026 (\$ millions)

Figure 59. Europe Lithium-Ion Battery Racks for Data Centers Sales 2021-2026 (Units)

Figure 60. Europe Lithium-Ion Battery Racks for Data Centers Revenue 2021-2026 (\$ millions)

Figure 61. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales 2021-2026 (Units)

Figure 62. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Revenue 2021-2026 (\$ millions)

Figure 63. Americas Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country in 2025

Figure 64. Americas Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Country (2021-2026)

Figure 65. Americas Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)

Figure 66. Americas Lithium-Ion Battery Racks for Data Centers Sales Market Share by Application (2021-2026)

Figure 67. United States Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 68. Canada Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 69. Mexico Lithium-Ion Battery Racks for Data Centers Revenue Growth

2021-2026 (\$ millions)

Figure 70. Brazil Lithium-Ion Battery Racks for Data Centers Revenue Growth

2021-2026 (\$ millions)

Figure 71. APAC Lithium-Ion Battery Racks for Data Centers Sales Market Share by Region in 2025

Figure 72. APAC Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Region (2021-2026)

Figure 73. APAC Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)

Figure 74. APAC Lithium-Ion Battery Racks for Data Centers Sales Market Share by Application (2021-2026)

Figure 75. China Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 76. Japan Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 77. South Korea Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 78. Southeast Asia Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 79. India Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 80. Australia Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 81. China Taiwan Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 82. Europe Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country in 2025

Figure 83. Europe Lithium-Ion Battery Racks for Data Centers Revenue Market Share by Country (2021-2026)

Figure 84. Europe Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)

Figure 85. Europe Lithium-Ion Battery Racks for Data Centers Sales Market Share by Application (2021-2026)

Figure 86. Germany Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 87. France Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 88. UK Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 89. Italy Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 90. Russia Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 91. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales Market Share by Country (2021-2026)

Figure 92. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales Market Share by Type (2021-2026)

Figure 93. Middle East & Africa Lithium-Ion Battery Racks for Data Centers Sales Market Share by Application (2021-2026)

Figure 94. Egypt Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 95. South Africa Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 96. Israel Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 97. Turkey Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 98. GCC Countries Lithium-Ion Battery Racks for Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 99. Manufacturing Cost Structure Analysis of Lithium-Ion Battery Racks for Data Centers in 2026

Figure 100. Manufacturing Process Analysis of Lithium-Ion Battery Racks for Data Centers

Figure 101. Industry Chain Structure of Lithium-Ion Battery Racks for Data Centers

Figure 102. Channels of Distribution

Figure 103. Global Lithium-Ion Battery Racks for Data Centers Sales Market Forecast by Region (2027-2032)

Figure 104. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share Forecast by Region (2027-2032)

Figure 105. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share Forecast by Type (2027-2032)

Figure 106. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share Forecast by Type (2027-2032)

Figure 107. Global Lithium-Ion Battery Racks for Data Centers Sales Market Share Forecast by Application (2027-2032)

Figure 108. Global Lithium-Ion Battery Racks for Data Centers Revenue Market Share Forecast by Application (2027-2032)

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