Reasons for the surge in energy storage orders

Overview

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Since the beginning of 2025, several leading battery manufacturers, including CATL and Yiwei Lithium Energy, have reported that their energy storage production lines are operating at nearly full capacity, despite an overall capacity utilization rate of less than 35%. The rapid increase in demand.

While excess production capacity and a shrinking overseas demand for energy storage pose challenges, 11 leading companies have defied the odds. In the first 11 months of this year, they secured overseas orders totaling nearly 250GWh. Some companies have consistently clinched substantial deals.

One key to addressing this challenge is better use of grid-scale storage — technologies that store energy and supply it back to the grid. These technologies are crucial for scaling clean energy solutions like solar and wind, which, despite their effectiveness, aren’t always available. Solar power.

Trump’s dampening effect on US investor sentiment could lead to a flight to quality while tariffs will cause a surge in orders this year, writes Tao Kong, managing partner of developer Luminous Energy. Kong will be speaking at the Energy Storage Summit USA 2025, which kicks off tomorrow in Dallas. How will energy storage change in 2025?

In 2025, some 80 gigawatts (gw) of new grid-scale energy storage will be added globally, an eight-fold increase from 2021. Grid-scale energy storage is on the rise thanks to four potent forces. The first is the global surge in deployment of solar and wind power, which are intermittent by nature.

Will energy storage grow in 2024?

The energy storage sector maintained its upward trajectory in 2024, with estimates indicating that global energy storage installations rose by more than 75%, measured by megawatt-hours (MWh), year-over-year in 2024 and are expected to go beyond the terawatt-hour mark before 2030.

Why is energy storage important?

Continued expansion of intermittent renewable energy, ESG-focused investments, the growing versatility of storage technologies to provide grid and customer services, and declining costs for key components like lithium-ion batteries all played a significant role in driving the investment and development of energy storage.

Will energy storage hit the Big Time?

By Vijay Vaitheeswaran, Global energy and climate innovation editor, The Economist Energy storage for the electrical grid is about to hit the big time. By the reckoning of the International Energy Agency (iea), a forecaster, grid-scale storage is now the fastest-growing of all the energy technologies.

Is grid-scale energy storage on the rise?

By the reckoning of the International Energy Agency (iea), a forecaster, grid-scale storage is now the fastest-growing of all the energy technologies. In 2025, some 80 gigawatts (gw) of new grid-scale energy storage will be added globally, an eight-fold increase from 2021. Grid-scale energy storage is on the rise thanks to four potent forces.

How are battery procurement strategies adapting?

Battery procurement strategies are also adapting, with master supply agreements (MSAs) and capacity reservation agreements (CRAs) helping to secure pricing and supply commitments. Developers and utilities must also navigate new safety regulations, longer permitting timelines, and evolving performance guarantees.

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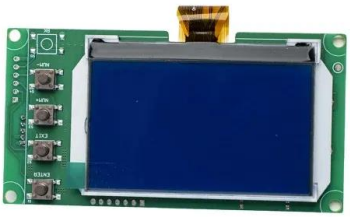

Why a surge in battery energy storage system installations is set ...

The global energy landscape is evolving at an unprecedented pace. With the increased adoption of renewable energy sources and the drive for a more sustainable future, the demand for efficient energy storage has never been greater.

Surge in Demand for Energy Storage Cells in 2025: From ...

The influx of overseas orders has led to a significant increase in order volumes for energy storage cell manufacturers, pushing them to operate at full capacity.

Global Energy Storage Order Surge: Overseas Breakthrough for ...

In the first half of 2025, the total global orders of Chinese energy storage companies exceeded 250GWh, of which overseas markets contributed nearly 125GWh (50%).

Surge in Energy Storage Orders: Exceeding 247GWh from ...

While excess production capacity and a shrinking overseas demand for energy storage pose challenges, 11 leading companies have defied the odds. In the first 11 months of this year, they secured overseas orders totaling nearly 250GWh. Some companies have consistently clinched substantial deals.

Charged Up: Six Reasons Why Storage Will Power ...

In this piece, we highlight six key reasons why energy storage will be at the center of the global transition, beyond the obvious intermittent issues of wind and solar.

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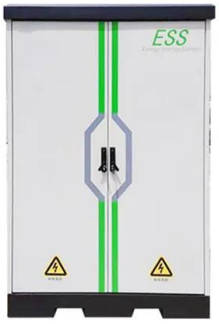

What 2025 holds for the US energy storage market

As a result, we are likely to see a surge in orders attempting to take delivery before the new tariff in 2026 takes effect. The surge in order is likely to overstrain bottleneck supplies.

Charged Up: Six Reasons Why Storage Will Power the Transition

In this piece, we highlight six key reasons why energy storage will be at the center of the global transition, beyond the obvious intermittent issues of wind and solar.

Energy Storage Order Growth: Meeting Demand in the ...

Well, here's something you might've noticed: global energy storage orders surged 240% in Q1 2025 compared to last year [1]. But wait, no--let's back up. Why is everyone suddenly scrambling for battery storage systems? The answer lies in three converging forces:

Why Energy Storage is Having a Moment: 5 Reasons Behind the Surge

From utility giants scrambling to build "grid-scale power banks" to homeowners installing solar-charged battery walls, the market's gone vertical. But what's really fueling this storage frenzy? Grab your insulated gloves - we're diving into the white-hot core of this energy revolution .

Energy Storage Rides a Wave of Growth but Uncertainty Looms: ...

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