

First quarter energy storage exports





Overview

How did the energy storage industry perform in 2q25?

In 2Q25, shipments reached 136.78 GWh, surpassing 4Q24 and setting a new all-time high. In 1H25, industry concentration remained high, with CR10 reaching 91.2%, roughly the same as in the previous quarters. CATL and Hithium ranked as the top two in global energy storage cell shipments.

Who makes the most energy storage cell shipments non-China?

The top three manufacturers in energy storage cell shipments non-China markets were CATL, BYD, and CALB. At present, most non-China cell shipments from Chinese-funded manufacturers are achieved through the commissioning of non-China energy storage projects by leading Chinese system integrators.

Is China entering a new era of energy storage demand?

Mainland China accounts for most of the global energy storage demand, driven in the near term by regional requirements for new utility-scale wind and solar projects to include energy storage capacity. However, the Chinese market is entering an era of change.

How did storage cell shipments perform in 1h25?

In 1H25, global small-scale storage cell shipments reached 21.64 GWh, up 72.38% YoY. In 2Q25 alone, shipments exceeded 10 GWh — the highest single-quarter delivery in nearly three years — driven mainly by downstream restocking and a shipment surge in the Australian market.



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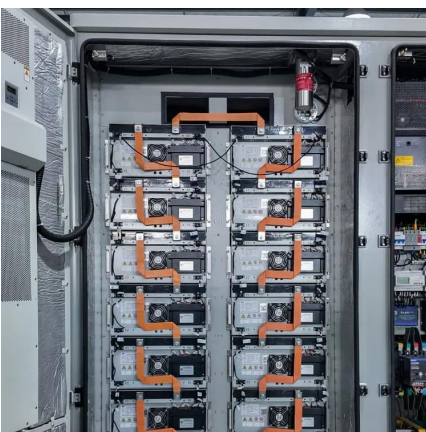


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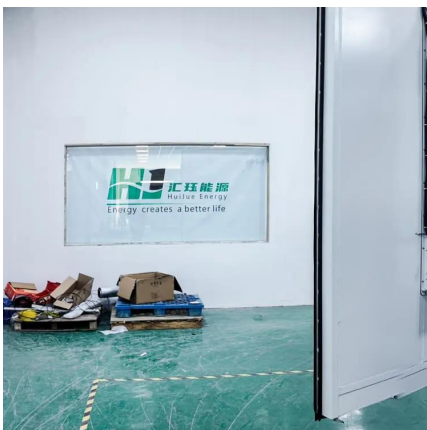


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