

Solar container battery shipments in the first quarter





Overview

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.

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.

How many GWh of energy-storage cells were shipped in the first quarter?

The world shipped 38.82 GWh of energy-storage cells in the first quarter this year, with utility-scale and C&I projects accounting for 34.75 GWh and small-scale (including telecom projects, hereafter as small-scale) projects 4.07 GWh, according to Global Lithium-Ion Battery Supply Chain Database of InfoLink.

What's going on with large-scale storage cell shipments in 2025?

Large-scale storage cell shipments reached 92.85 GWh, up 160.08% year-on-year. The top five players—CATL, EVE Energy, CALB, Hithium, and BYD—remained consistent for three quarters, though rankings shifted. The market share gap among the second to fifth players is now within 3%, indicating fierce competition in 2025.



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