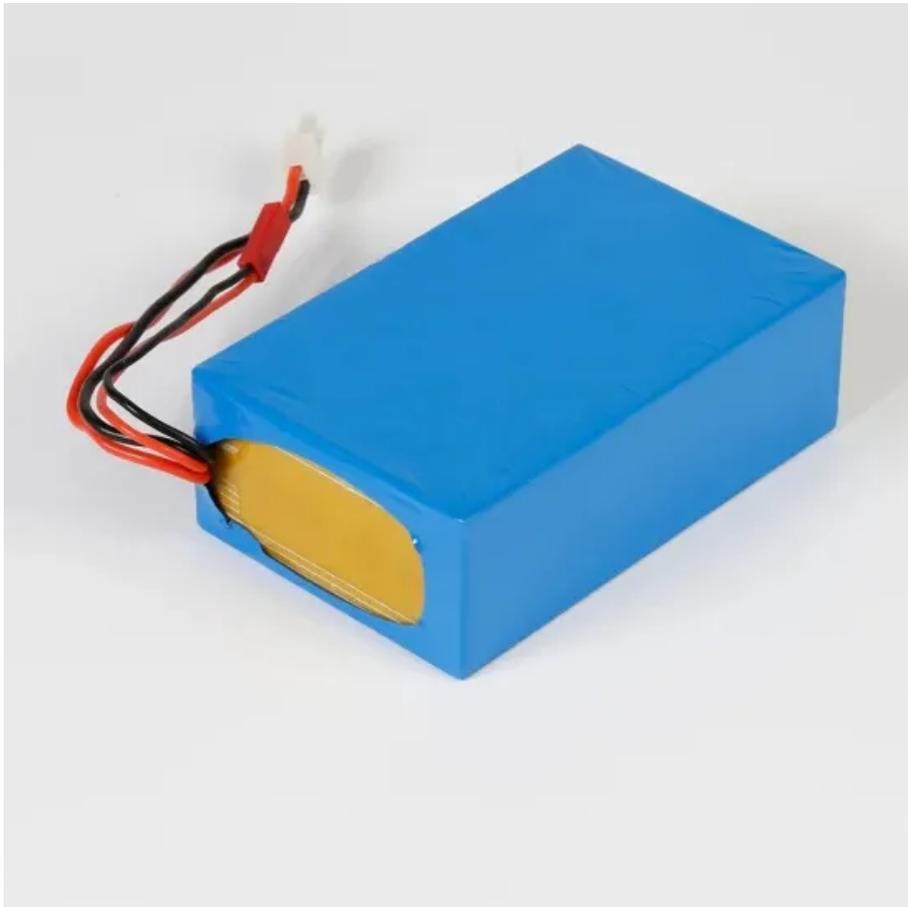


EQACC SOLAR

Solar energy storage investors



Overview

Is energy storage a critical asset?

Layer in heightened demand from broad electrification and data centers (especially AI workloads that run 24/7, which is expected to quadruple by 2030), and energy storage is now seen as a critical asset. Its investment thesis breaks down into two interconnected waves: The first is the buildout of grid-scale batteries.

What drives energy storage project development?

Globally, energy storage project development is increasingly driven by the utility-scale segment, with mandates and targeted auctions driving gigawatt-hour projects in markets like China, Saudi Arabia, South Africa, Australia and Chile.

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.

What makes CATL a great EV & battery storage supplier?

As the global storage buildout continues, CATL's sheer scale, relentless cost-down engineering, and system-level integration make it a default hardware supplier for a significant portion of the planet's energy infrastructure. HQ: China; Vertically integrated EV and battery storage powerhouse.

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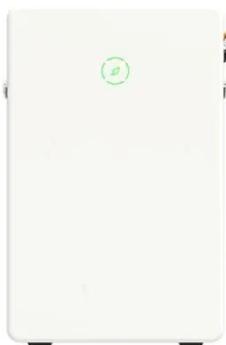
Energy Storage Investments - Publications

Investors may look toward battery storage solutions with differing investment theses. For example, energy storage systems are seen by some investors as a potential ...



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