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ANMD-MRS17-168

LONG-DURATION ENERGY STORAGE (LDES) UNITS

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 965.0m 2025A market value	**US$ 1,099.0m** 2026E market value	**US$ 2,400.0m** 2032F forecast	**13.9%** CAGR 2025A to 2032F
7 regions Geographic coverage	**14 modules** Country modules	**657 exhibits** Including 105 charts	**243 + 102** Organizations and patent records
2020–2032 Historical data and forecasts		**Global** Regional and country coverage	

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS17-168 | Energy Storage & Grid Integration
Published	September 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	343 pages | 34 chapters | 7 appendices | 657 exhibits including 105 charts
Geography	7 regions | 14 country modules | Residual regional groupings
Segmentation	5 core technology classes plus duration, application, commercial readiness, end user, business model and primary grid service overlays
Directories	243 organizations based in 25 countries | 102 patent records in 12 jurisdictions
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

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Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, methodology and the global and regional analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
1	**About This Report** Purpose and scope • Market boundary and definitions • Segmentation framework • Geographic framework • Methodology and evidence basis • Currency, units and notation **Selected exhibits** *Exhibit 1: LDES Units — Market Boundary Inclusions and Exclusions | Exhibit 2: LDES Units — Segmentation Framework*	4	1
2	**Executive Market Brief** The market in brief • Why the market matters now **Selected exhibits** *Exhibit 5: Global LDES Unit Market Value by Core Technology Class, 2020H–2032F (Chart) | Exhibit 6: LDES Units — Market at a Glance*	2 1 chart	5
3	**Executive Summary and Market Metrics Dashboard** Headline market trajectory • Segment and regional snapshot • Market metrics dashboard **Selected exhibits** *Exhibit 9: Global LDES Unit Value Share by Core Technology Class, 2026E (Chart) | Exhibit 12: LDES Units — Executive Metrics Dashboard (2025A unless noted)*	6 2 charts	7
4	**Global Market — Dynamics, Size and Outlook** Industry background and participant map • Market drivers and restraints • Porter's Five Forces and PESTLE • Opportunity maps and strategic options • Global market size and forecast • Boundary, applications and measurement basis **Selected exhibits** *Exhibit 13: LDES Unit Configuration Families and Application Logic | Exhibit 15: LDES Units — Market Driver Assessment*	11 1 chart	11
5	**Regional Markets — Seven-region Overview** Regional dashboard • Regional value and share comparison • Regional demand character • Regional opportunity ranking • Deployment, supply, regulation and evidence-priority map **Selected exhibits** *Exhibit 27: LDES Units — Regional Value, Share and Growth | Exhibit 29: LDES Units — Regional Opportunity Ranking*	7 1 chart	20
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Country-module data requirements **Selected exhibits** *Exhibit 31: Country Module — Fixed Subsection Structure*	1	24

Part II

Regional, Country, Segmentation and Demand Analysis

Seven-region coverage, 14 country modules and the market series used to compare value, deployment and demand.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** Regional overview and dashboard • United States • Canada • Rest of North America **Highlights** *Value, technology-class and overlay series for each country module | Policy matrices for DOE long-duration demonstrations, the standalone storage ITC and Ontario IESO procurement*	76 14 charts	26
8	**Europe — Regional Analysis and Country Modules** Regional overview and dashboard • United Kingdom • Switzerland • Germany • Nordics • Rest of Europe **Highlights** *Value, technology-class and overlay series for four country modules | Policy matrices for the Ofgem cap-and-floor regime, the Kraftwerksstrategie and Nordic district heating*	130 26 charts	55
9	**Asia Pacific — Regional Analysis and Country Modules** Regional overview and dashboard • China • Australia • India • Japan • Rest of Asia Pacific **Highlights** *Value, technology-class and overlay series for four country modules | NEA new-type storage framework, Capacity Investment Scheme and Energy Storage Obligation readings*	130 26 charts	104
10	**Latin America — Regional Analysis and Country Modules** Regional overview and dashboard • Chile • Rest of Latin America **Highlights** *Value, technology-class and overlay series for Chile | Storage in energy auctions and curtailment policy*	49 8 charts	153

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12	**Middle East — Regional Analysis and Country Modules** Regional overview and dashboard • Saudi Arabia • United Arab Emirates • Rest of Middle East **Highlights** *Value, technology-class and overlay series for Saudi Arabia and the United Arab Emirates | 24/7 clean-power and green-hydrogen program readings*	76 14 charts	**189**
13	**Rest of World — Regional Analysis and Country Modules** Regional overview • Composition and market character • Value and outlook **Selected exhibits** *Exhibit 552: Rest of World — Market Character | Exhibit 553: Rest of World — Value and Outlook Summary*	12	**217**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables **Selected exhibits** *Exhibit 554: Global LDES Unit Master Series, Panel A: 2020H–2026E (US$ Million) | Exhibit 568: Regional LDES Unit Value by Technology Class (2025A, US$M)*	18	**221**
15	**Global Segmentation Analysis** Primary split by core technology class • Duration, application and commercial-readiness overlays • End-user, business-model and grid-service overlays • Full annual segment and overlay series • Cross-tabulation, additivity and exclusion controls **Selected exhibits** *Exhibit 580: Global LDES Units by Duration — Value and Share | Exhibit 600: LDES Units — Technology Class by Duration Band (2025A, US$M, primary-axis additive)*	29 3 charts	**227**
16	**Demand Signals and Forward Indicators** Structural demand signals • Program and policy pipelines • Economic and adoption signals • Indicator dashboard • Leading indicators **Selected exhibits** *Exhibit 601: LDES Units — Program and Policy Pipeline Signals | Exhibit 602: LDES Units — Forward Indicator Dashboard*	3	**238**
17	**Adjacent-market Enablers** Adjacent enabler landscape and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Battery, power-electronics, grid and software interfaces **Selected exhibits** *Exhibit 604: LDES Units — Adjacent-Market Enabler Map*	1	**240**

Part III

Competition, Engineering, Innovation, Sustainability and Policy

Competitive structure and participant profiles alongside unit engineering, research, sustainability due diligence, supply chains and regulatory frameworks.

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19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration reading • Directory-evidence presence rankings • Capability matrices • Competitive outlook • Capability and delivery-footprint benchmark **Selected exhibits** *Exhibit 621: LDES Units — Directory-Presence Prominence by Technology Class | Exhibit 622: LDES Units — Developer Capability Matrix*	2	**253**
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23	**Sustainability Due Diligence, ESG, SDG and Climate Analysis** Carbon and embodied materials • Water, resource and circularity context • Double-materiality assessment • ESG framework alignment • SDG contribution mapping • Climate risk and adaptation • Anti-greenwashing screen **Selected exhibits** *Exhibit 629: LDES Units — Priority SDG Contribution | Exhibit 631: LDES Units — Carbon Profile and Avoided-Emissions Reading by Class*	8	263
24	**Value Chain, Supply Chain and Geopolitical Analysis** Value-chain map • Material inputs, components and electronics • Manufacturing and delivery footprints • Trade measures and localization • Logistics and delivery capacity **Selected exhibits** *Exhibit 635: LDES Units — Value-Chain Stages and Value Capture*	1	281
25	**Policy, Regulation, Legal Structures and Integrated Risk** Cap-and-floor, DOE demonstration and CAES regimes • Subsidy and program architecture by jurisdiction • Standards and certification • Legal structures for delivery • Integrated policy risk reading **Selected exhibits** *Exhibit 636: LDES Units — Subsidy and Program Architecture by Jurisdiction*	1	283

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Risk, Economics, Implementation and Outlook

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