

Global BESS Surge: 18 GWh Online in July as Europe Goes Continental

NEGUP MACHINE Market Brief - 28 August 2026

1. July 2026 Deployment Data

Industry tracking data published 27 August 2026 confirms 18 GWh of large-scale BESS capacity came online globally in July. China accounted for approximately 70% of deployments. The year-to-date installed base is 27% above the same point in 2025, keeping the full-year trajectory on track for 360 GWh of new BESS deployments as projected by BloombergNEF.

2. China August Production: 304 GWh

A 37-company survey estimated China's planned battery production at approximately 304 GWh for August 2026, up 7.4% from July. Stationary storage cells accounted for ~125 GWh (41%). The top-five manufacturers scheduled 193 GWh (+8% MoM, +67% YoY). H1 2026 combined battery output reached 1,068.9 GWh (+53.3% YoY). LFP led the expansion.

3. Key European BESS Projects (August 2026)

Project / Developer	Country	Capacity	Status
Greenvolt (Elk+Turosn)	Poland	400MW/1,600MWh	Financing closed
Korkia/Enlight	Finland	125 MW	Sold, ready-to-build
Elesela (Klaipeda)	Lithuania	20 MWh	Financial close
European Energy	LT/LV	71MW/170MWh	Under construction
GEN-I Sonce	Romania	55MW/220MWh	EPC contracted
COMAX France	France	57MW/114MWh	Operational
Alpiq/ECO STOR	Germany	~260 MW	Acquired
Masdar	UK	Commercial op.	Operational
HMC Capital	Australia	300MW/1,200MWh	Equity committed

4. Key Market Metrics

Metric	Value	Source
BESS online July 2026	18 GWh	Industry tracking
YTD growth vs 2025	+27%	Industry tracking
China Aug battery output	~304 GWh	37-company survey
China Aug storage share	~125 GWh (41%)	Survey estimate
H1 2026 total output	1,068.9 GWh (+53.3%)	CABIA
BNEF 2026 BESS forecast	123 GW / 360 GWh	BloombergNEF
Austria 2030 target	Up to 8 GW	Austrian govt

5. Implications for Cell & Pack Manufacturers

The convergence of 18 GWh monthly deployments, 125 GWh monthly storage-cell production, and a multi-billion-euro European project pipeline creates three key implications:

- Demand floor has shifted: cell production lines at 95%+ utilization, pricing power on supply side, Q4/Q1 2027 cell supply windows narrowing.
- European pipeline diversifies customer base: new EPC contractors and integrators across CEE represent new pack-assembly customers.
- Technology mix converges on LFP: large-format LFP prismatic cells (314-628 Ah class) dominate stationary storage procurement.

NEGUP MACHINE | WhatsApp +86 153 0769 0902 | rain@negupgroup.com | www.negupmachine.com
Battery assembly & testing equipment for LFP prismatic cells up to 628 Ah class.