



U.S. DATA CENTER BATTERY MARKET ASSESSMENT & ENTRY



ABOUT THE CLIENT

Industry	Battery distribution & retail
Revenues	\$500M+
Employees	1,000+
Location	United States
BOS Service or Solution	Market Strategy and Implementation Support

Key Challenges

- Complex and highly segmented market.
- Most attractive segments were concentrated and hard to access (OEM/EPC-controlled).
- Client's core competencies were in consumer retail, not B2B critical-infrastructure.
- Build vs. buy vs. partner entry strategy options tripled the decision-making complexity.

Project Scope

Market segments:

- Hyperscale
- Colocation
- Enterprise
- Edge

Supply chain tiers:

- Project owners
- Integrators
- EPC
- Aftermarket

Channels:

- Direct
- Partner

Battery chemistries:

- Lead-acid: VRLA, Flooded, TPPL
- Lithium-ion: LFP, NMC

Products & Services:

- Battery supply
- Distribution
- Installation
- Maintenance
- Recycling

Financial Benefits Realized

- ~\$100m annual revenue path in 3-5 years.
- Positive ROI and NPV on all recommended products and services (some more profitable than others in the cluster).
- 3.5-8.0x payback on CapEx.

Why Boston Strategies International was Selected

- Expertise in battery and critical-power markets.
- Prior engagements and knowledge of battery products and solutions markets.
- Deep understanding of the data center value chain and end users.
- Track record quantifying markets and building financial business cases.

Project Approach

- Sized and forecasted the market by segment, use case and chemistry (64 slices).
- Mapped value-chain tiers, margins and key players by segment.
- Assessed technologies, competitive strengths, key success factors and white spaces.
- Ran a capability-gap assessment against the requirements of two dozen actual RFPs.
- Analyzed partners
- Bundled clusters of related services.
- Evaluated 20+ entry pathways on eight criteria, with full financial models (market size, CapEx, margin, NPV, ROI).
- Recommended a portfolio and positioning.

Operational Benefits Realized

- Capability development plan to cover gaps put into place
- Partner roadmap with named partners and negotiation strategies.
- Plan to repositioned B2C to B2B.
- Value propositions and sales collateral developed.