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The Battery Show Asia

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The Battery Show India 2025

India's Transforming Ecosystem: Scale, Speed & Strategic Opportunity

The 3rd edition of **The Battery Show India 2025**, held alongside the Renewable Energy Expo in Greater Noida, showcased the scale, ambition, and accelerating momentum of India's clean-energy transformation. With **55,000+ visitors, 3,200 companies, 450+ speakers**, and high-level representation from government, industry, and international partners, the event reaffirmed India's position as one of the world's most dynamic markets for **renewable energy and battery storage**.

India has reached a major milestone – **one-third of its electricity now comes from renewable sources**, driven by **127 GW solar** and **53 GW wind** installations. Strong policy signals such as **PLI schemes, VGF support for BESS**, active **tender auctions**, and the broader **"Make in India"** framework are accelerating industrialization across the value chain. Yet the ecosystem continues to navigate challenges in **skills, manufacturing maturity, raw-material access, quality standards**, and bridging the gap between **R&D and commercialization**.

Across discussions—with stakeholders from mobility, grid storage, manufacturing, and policy – a consistent theme emerged: **India's battery ecosystem is enthusiastic, fast-moving, and increasingly collaborative**, backed by rising FDI interest and global partnerships, especially with the **EU and Germany**. At the same time, the reality of climate risk – **a projected ~25% GDP loss by 2070** – underscores the urgency of an inclusive, resilient, and sustainable transition.

This report captures the **key insights, challenges, and opportunities** shaping India's battery and energy-storage landscape—offering a clear, data-grounded perspective for industry leaders, policy-makers, and innovators looking to engage with this rapidly evolving market.

A Rising Clean-Energy Nation: Signals From the Opening Stage

Light – representing Knowledge, Wisdom, and Prosperity

The opening ceremony of the 18^{th} Renewable Energy Expo and 3^{rd} Battery Show India was joined by high-level guests including Ewa Suwara (dep. Head of Delegation EU to India), Dr. Philipp Ackermann (German Ambassador), the Prince of Cambodia, Teri director general, IMEA, Informa Markets representatives, Debasish Das (Director, Head RE Nodal Agency, government of Obisha), Shri Mana Srivastava (Gov. Madhya Pradesh), Rajneesh Khattar (Sr. Group Director of Energy Portfolio Informa Markets India). Their welcome addresses highlighted the significance and potential of India as a global partner and rising economy in the renewable energy and energy storage sector.

The Renewable Energy Expo and Battery Show India attracted over 55000 visitors and 3200 companies. Over 450 speakers were curated into an informative conference program and further high-level knowledge-sharing and vision creation took place in the dedicated CEO & CTO conclaves.

India has achieved to gain 1/3 of its electricity from renewable energy sources in 2025[1] through the installation of 127 GW of PV and 53 GW of wind capacity (as of September 2025)[2], representing more than a threefold increase over the last decade.

Speakers addressed the current Air Quality Index (AQI) in India with great concern (measuring 279 that day in Delhi) and the urge for action. India is ahead of its targets in reaching net-zero by 2027[3] that were committed at the COP26 in Glasgow[4]. Supportive schemes, like the Production Linked Incentives (PLI) for solar cells, electrolyzers, and batteries (amongst other sectors) are in place to improve the competitiveness and strengthen India's "National Manufacturing Mission"[5]. For the incorporation of renewable energy into the grid, India is active in tender auctions for stationary energy storage (479 in 2025)[6,7].

Also international challenges for Indian companies, like the European Carbon Border Adjustment Mechanism (CBAM)[8] were named. India is certainly one of the global regions that are significantly affected by climate change, namely in a projected $\tilde{2}5\%$ GDP loss until 2070 [9]. Strong and reliable partnerships, such as the one between the EU and India, are substantial, with current a permanent office for business relations (Federation of European Business in India (FEBI)[10]) negotiations proceeding to reach a Free-Trade-Agreement (FTA)[11]. Both economies share similarities in terms of energy need, GDP growth, and size. There are hundreds of projects jointly performed by EU and Indian partners [12] and more than a dozen of clusters in clean energy[13].

Germany is presented with 46 companies at the expo, following the strategic partnership between Germany and India, formulated in 2022[14] and the opportunities provided by the Indian-German investment platforms[15]. The potential for knowledge exchange, joint development, and the opportunities for scale in India have also attracted international research institutions like UC Berkeley to set up a presence in India[16].

India's confidence rises year-on-year, revealing its potential and capabilities. The ecosystem is vibrant and inclusive where economic prosperity and harmony converge is at the centre. India's growth shall be green and the energy transition inclusive.

[1] India's Energy Mix & Power Sector Overview [access 10 Nov 2025]
[2] Physical Achievements of installed Renewable Energy capacity [access 10 Nov 2025]
[3] India ahead of its targets to reach Net-Zero [access 10 Nov 2025]
[4] Glasgow Climate Pact: Key outcomes from COP26 [access 10 Nov 2025]
[5] India's National Manufacturing Mission [access 10 Nov 2025]
[6] Battery Energy Storage Tenders [access 10 Nov 2025]
[7] Energy Storage Tenders [access 10 Nov 2025]
[8] EU Carbon Border Adjustment Mechanism (CBAM) [access 10 Nov 2025]
[9] Asia-Pacific Climate Report 2024 [access 10 Nov 2025]
[10] {hrefhttps://febi.co.in/Federation of European Business in India [access 10 Nov 2025]
[11] Free-Trade-Agreement EU-India update [access 10 Nov 2025]
[12] EU-India projects [access 10 Nov 2025]
[13] EU-India clusters [access 10 Nov 2025]
[14] Germany-India strategic partnership [access 10 Nov 2025]
[15] India-German investment platforms [access 10 Nov 2025]
[16] India Energy & Climate Center [access 10 Nov 2025]

Key Takeaways:

- Global Presence – The event showcased high-level Indian and international leaders, signalling strong confidence in India's clean-energy momentum.
- Renewable Milestone – India now generates one-third of its electricity from renewable sources, driven by 127 GW solar and 53 GW wind capacity.
- Policy Push – Schemes like PLI, National Manufacturing Mission, and BESS tenders are accelerating India's energy-transition strategy.

We Recommend:

- ▷ Policy Alignment – Strengthen collaboration with India's energy ministries and incentive schemes to align industry strategy with national priorities.
- ▷ EU–India Synergy – Use EU–India frameworks to support companies navigating regulatory, investment, and compliance requirements.

Inside India's Battery Boom: Market Realities & Stakeholder Confidence

The enthusiasm is on a very high level

Renewable energy and battery energy storage are a pathway into India's future. Global renewable power generation overtook for the first time the power generation by coal[17] and in India the consumption of coal fell by 3.1 % (-22 TWh) and gas fell by 34 % (-7.1 TWh). China, India, and the European Union account for more than 50 % of renewable capacity growth and represent 85 % of the global tendered capacity until the end of the decade.[18] India is fully immersed in the global trend.

The battery market in India is booming with the help of lithium ion batteries imported from mostly China. Electric mobility, especially the 2- and 3-wheelers segment, as well as the Battery Energy Stationary Storage (BESS) are growing with a high pace. Policies are seen as a main driver for this trend. The market for lead-acid batteries is, on the other hand, decreasing. Still there is a gap between the ambitious goals of 300 GWh capacity installed by 2030 and actual installed capacity today. Interest for Foreign Direct Investments (FDI) is increasing, which gives stakeholders the confidence that the set targets are reachable. Manufacturing is yet to be implemented into the Indian ecosystem. Currently battery assembly dominates this industry sector.

India is a huge market, which is absorbing all products, providing good business opportunities for companies. Component manufacturers have already implemented substantial production capacity and are ready to expand further. Strong technology collaboration partnerships are established between foreign countries and India, which is vital to ensure the ecosystem to flourish.

Eventually India will produce their own battery cells and is expected to be cost competitive with Chinese products (about 30 % less) due to lower

[17] Global Electricity Insights – Ember [access 10 Nov 2025]
[18] IEA Renewables 2025 – Analysis [access 10 Nov 2025]

labour cost in India. First green field projects are expected to produce recognisable amounts of batteries in 2026. The prices, thus, will reduce significantly once local production has picked up and the domestic technology implementation has matured.

Key Takeaways:

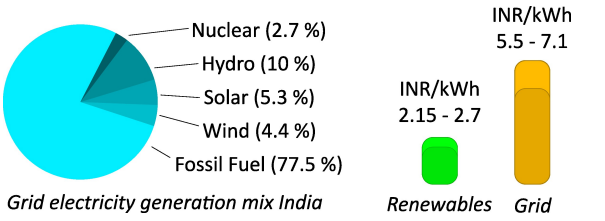
- Market Expansion – India's battery demand is rising rapidly, driven by 2w/3w e-mobility and fast-growing BESS adoption.
- Assembly Dominance – The ecosystem still relies on cell imports, with domestic manufacturing expected to grow from 2026 onward.
- FDI Momentum – Strong foreign investment interest reflects confidence in India's scale and market attractiveness.

We Recommend:

- ▷ Localisation Roadmaps – Support companies in developing stepwise localisation and technology-transfer plans.
- ▷ Cost Competitiveness – Build cost–technology plans enabling firms to compete in India's highly price-sensitive market.

Policy Push, Market Pressure: Navigating India's Evolving Battery Framework

Generally the regulatory landscape is seen positively. There are various subsidy schemes for companies. One is the Production Linked Incentive (PLI) scheme, dedicated to 14 sectors[19] with one of them being the scheme for Advanced Chemistry Cell (ACC) manufacturing[20]. Another scheme is the Viability Gap Funding (VGF) for the development of BESS by the Minitstry of Power and the Ministry of New and Renewable Energy.[21] Additionally, Special Economic Zones (SEZ) as well as tax exemptions are implemented within the "Make India" framework[22], to help local companies to grow and reach a competitive level to establish themselves on the market.



Electricity generated from renewable energy is already considerably cheaper with 2.15 – 2.7 INR/kWh[23] compared to electricity from the grid at rates between 5.5 – 7.1 INR/kWh for residential[24]. Electricity prices in India are about 50 % higher for commercial use compared to domestic use[25].

A strong government support and clear vision is needed since India is starting from scratch and many aspects of the ecosystem (manufacturing, materials development, regulations, . . .) have to be developed simultaneously. An intensive collaboration between all stakeholders is required to turn this challenge into a success.

Competition is perceived as a major challenge. Due to the great market opportunities, many companies have started their business, especially in the 2- and 3-wheeler segment. The company landscape will probably go through a major consolidation within the coming 7 – 8 years. Quality is another challenge, since customers focus on price and customers are not very interested in longevity. Thus, the margin for products is very low and competition is high. Stakeholders perceive this as not sustainable, yet it is the current situation.

[19] PLI funding scheme [access 10 Nov 2025]
[20] Advanced Chemistry Cell (ACC) scheme [access 10 Nov 2025]
[21] Viability Gap Funding for BESS [access 10 Nov 2025]
[22] "Make in India" [access 10 Nov 2025]
[23] Cost of solar power per unit in India [access 10 Nov 2025]
[24] Electricity Rate per Unit in India [access 10 Nov 2025]
[25] Electricity prices domestic vs. business in India [access 10 Nov 2025]

With the uprising battery cell manufacturing capacity in India in the coming years, the access to raw materials becomes more prominent and needs to be approached. In the same time the quality of battery cells and equipment for their manufacturing from mature markets in East Asia needs to be matched locally. For this, at least, it needs skilled labour, which is already scarce in India.

Education is a major topic to approach within the ecosystem, this holds for training skilled workers as well as customers to understand the value of quality products and more about the technology behind it. Stakeholders look forward to source battery cells made-in-India for which a more localised supply chain has to be established. Continuous favourable regulatory frameworks are required to support these targets and to drive the implementation of improved infrastructure (roads, ports, supply of electricity and raw materials).

Overall, the initiatives of the government is perceived well in the large field of green technology, renewable energy, electric mobility. The stability of the government is appreciated and the reliability of policies.

It needs the right mechanisms and talent to reach net-zero - it is possible a holistic approach.

Key Takeaways:

- Strong Incentives – Policies such as PLI-ACC, VGF, and SEZ benefits create a positive regulatory environment.
- Price Pressure – Extreme market competition and customer focus on lowest-cost products constrain quality and margins.
- Skill & Material Gaps – Shortages in skilled labour, raw materials, and infrastructure remain key obstacles.

We Recommend:

- ▷ Quality Focus – Encourage firms to embed quality and reliability standards, even under price pressure.
- ▷ Capability Building – Develop programs to strengthen workforce skills and domestic supply-chain capabilities.

LDES as the Next Frontier: Enabling a 24-Hour Renewable Grid

Long Duration Energy Storage (LDES) is one of the focus points of global policy makers that have announced clear targets[26]. The rising penetration of renewable energy sources will demand an increasing deployment of LDES into the grids, especially to ensure grid stability through spinning reserve and voltage support[27]. The solution will be a technology mix of different types of energy storage and in multiple time scales. Many subsidies have gotten into first projects for LDES. Simultaneously a number of thermal power plants are added for reliability on grid stability.

The technology and energy landscape changed a lot in the recent decades. Various LDES technologies are available of which the Pump Hydro Storage (PHS) is seen as the most mature. Others include e.g. Zn-batteries[28], Fe-Batteries[29], flow-batteries[30], gravitational[31] and thermal[32] storage, which would be suitable for seasonal storage. A challenge is to build a resilient supply chains. These are assumed to stabilize within the coming 5 – 10 years and manufacturers urge policy makers to focus on supporting the mitigation of this challenge.

A pricing target should be set to $30/kWh on a system level for LDES that takes a holistic pic-

[26] Long Duration Electricity Storage [access 10 Nov 2025]
[27] Report on spinning reserve and voltage support [access 10 Nov 2025]
[28] Zn-based batteries for sustainable energy storage: strategies and mechanisms [access 10 Nov 2025]
[29] Rechargeable iron-ion batteries: recent progress, challenges, and perspectives [access 10 Nov 2025]
[30] MIT News: Flow batteries for grid-scale energy storage [access 10 Nov 2025]
[31] Solid gravity energy storage: A review [access 10 Nov 2025]
[32] European Association for Storage of Energy: Thermal Energy Storage [access 10 Nov 2025]

ture into account the whole business case and the Levellised Cost Of Storage (LCOS) and is composed for regional specific use cases.

Technical assistance and scale are important for capacity building. Support for the first Proof of Concept (Poc) on grid scale level is needed, after which further implementation of capacity becomes easier. The whole ecosystem needs to know about the involved entities and stakeholders should be trained to distinguish various types of energy storage (short-, mid-, long-term). Stakeholders urge for increased funding for scale-up projects. Also enabling of revenue stacking of various capabilities (beyond peak shaving) for energy storage assets in order to support establishing bankable business models.

Tenders are coming for various capacities (2, 4, 6, and eventually 8 to 10 hours). China is mentioned as a good example to have many policies for LDES in place and Indian stakeholders wonder which of those could be translated to the domestic market to best support the ecosystem. Also other global regions like Australia with its Long-term service agreement in Australia[33] and the dynamic of the Middle East are seen as a role model. It is acknowledged that the Chinese government places significant investment in such technologies and is very decisive about it. Indian stakeholders perceive a gap between policy making and execution, as well as the complex nature with two governmental institutions (Ministry of Power and Ministry of Renewable Energy) are involved in the process.

Key Takeaways:

- Grid Necessity – LDES is becoming essential for 24-hour renewable integration in India.
- Multiple Technologies – Zn, Fe, flow, gravity, and thermal battery storage are options to be explored.
- Execution Gap – Stakeholders highlight gaps in policy execution, revenue stacking, and LDES pricing models.

We Recommend:

- ▷ Tech Evaluation – Provide neutral assessments to select grid-fit LDES technologies.
- ▷ Model Development – Support firms in designing bankable business models integrated with ancillary-service revenues.

From Assembly to Industrialisation: India's Journey Toward Battery Self-Reliance

Indian companies are determined to create resilient supply chains to enable the fulfilment of ambitious policy targets and customer demand. Policy makers are faced with the challenge to implement the most effective and efficient levers for individual segments of the value creation chain. There are various policies, initiatives, and schemes in place on national and state level. Earlier the focus was on the EV sector which has changed now to a more holistic approach incorporating the whole industrialisation of the ecosystem (including components, manufacturing, and assembly).

The execution to establish an ecosystem has many dimensions in the light of the size, time constraints, geopolitical dynamics, and rising international standards. Technology is needed along the whole value creation chain to allow for efficient processing, minimising waste and maximising the recycling of materials, with the latter being as well important from a resiliency point of view, since India can not source many of the required materials domestically.

The Production Linked Incentive (PLI) schemes are picking up slowly since local sourcing of equipment is limited. India started with assembly, repurposing, and repair of batteries and is approaching the implementation of battery cell manufacturing. It is noted that a good number of component manufacturers are already active on the local market and ready to scale up. A chal-

[33] Long-Term Energy Service Agreements [access 10 Nov 2025]

lenge remains in workforce training, especially for cell manufacturing and recycling. Curricula need to be analysed and tailored.

Another gap is perceived about how to bridge academy and economics, i.e. the Technology Readiness Levels (TRL) 3 to TRL 8. Funding is missing especially for TRL 4 to TRL 6/7, above and below these levels sufficient support can be found[34]. There is good funding for R&D from policy makers (a 50000 croe (5 bn) NRF scheme for research of the Anusandhan National Research Foundation (ANRF) between 2023-28[35]) and less from the private sector, thus many innovations do not cross the line to commercialisation. Yet start-up finding is picking up – it is happening – venture capitalists and family offices have started to provide funding.

The size of the Indian market suggests to approach things stepwise, not all all technology can immediately be implemented for every use case (e.g. internal combustion engine vehicles to battery electric vehicles). The economics have to be taken into account simultaneously, thus starting where the implementation is cheaper, such as 2- and 3-wheelers. A lot of SMEs are working in this sector, including battery swapping technology.

Circularity is about independence and energy security for India and circular economy practices are picking up in the order: Repair, Repurpose, Recycle. Heat, energy, waste are increasingly reused and materials recovered. Recovering materials is increasingly seen as a prime responsibility. Batteries shall be designed for 2nd life applications. An additional focus is put on recycleability for materials on battery, pack, and system level, including infrastructure. Stakeholders also think about the life cycle sustainability and the emissions along the global supply chain.

There is growing awareness that 'doing things well instead of just doing them' will distinguish the Indian ecosystem from others and the competition on sustainability is an opportunity to start in a cleaner way.

Key Takeaways:

- Holistic Shift – India is moving from EV-centric growth to full value-chain industrialisation across components, manufacturing, and recycling.
- Tech Backbone – Advanced processing and recycling technologies are needed to minimise waste and increase material recovery.
- TRL Gap – Limited availability of funding between TRL 3–8 restricts commercialisation of innovations.

We Recommend:

- ▷ Innovation Scaling – Strengthen EU–India partnerships to accelerate TRL 4–7 technology development.
- ▷ Circular Design – Promote circularity-by-design and second-life planning across product and system development.

India's Energy Storage Leap: Markets, Models & Manufacturing Innovation

1.5 days of high-level exchange sponsored by TrinaStorage and SolarX

The Energy Storage Forum was a parallel event to the Renewable Energy Expo and the Battery

[34] Decoding India's Battery R&D Ecosystem: The Commercialization Challenge [accessed 10 Nov 2025]
[35] Aims of Anusandhan National Research Foundation [accessed 10 Nov 2025]

Show India and focussed on strategic pathways for Energy Storage Systems (ESS) deployment through smart policies and incentives, latest technology trends in BESS and their manufacturing, the energy storage market, tariff structures, financial models, and economic matters for BESS projects, and topics around global supply chains and opportunities for localisation, and India becoming a potential future supplier hub.

India has an ambitious target to install 236.2 GWh of BESS by 2031-32 based on the National Electricity Plan[36]. With the rising deployment of renewable energy sources, long-duration energy storage (LDES) is becoming more and more significant. Still there are regulatory challenges and aggressive pricing that needs to be approached for this segment to experience sustainable growth. Currently, India has about 500 MWh of BESS installed[37]

A mix of energy storage systems will favour the demand. About half of the energy demand in industry is utilised for heating and cooling, which requires a stable supply from the grid. Also thermal and gravitational energy storage systems would be viable solutions to be considered. China was mentioned as a role model where they concentrated on both power and thermal storage for district heating and cooling. Incorporated was the creation of inertia power to stabilise the grid.

Implementation challenges still exist here in India: Stakeholders urge for an update of tender structures in order to include ancillary services and incentives for the whole performance range batteries are capable of, e.g. providing power within seconds. Also the times of usage could be specified in tenders. On the other hand, if utilised for a frequency response service, batteries degrade much faster, which should as well be taken into account and rewarded. In addition the round-trip efficiency of the batteries and the auxiliary energy needed for air-conditioning the storage systems should be taken into account by policy makers.

The aggressive pricing currently seen in the market for the BESS sector leads to an increasing number of leasing business models in order to reduce the CapEx of the system for the user. This is in particular interesting for the Commercial & Industrial (C&I) market. The lower upfront investments and only leasing and operational cost, substantial savings on net electricity bills are gained.

One of the new technology trends in manufacturing was presented by Fraunhofer. Their innovative dry coating technology (DRYtrace®)[38] is currently developed up to TRL 6 and is capable to serve a capacity of 10 m/min. This technology is compatible with a number of next-generation battery chemistries (solid state, lithium sulphur, 100 % silicon anodes). From a techno-economic point of view, dry electrode coating could reduce up to 30 % in energy demand and 15 % of factory floor footprint in battery cell manufacturing.

The energy storage market in India is expected to show an exponential growth in the coming years based on the huge demand of the domestic market and strong policy signals sent from federal and state governments.

Key Takeaways:

- Long-Term Targets – India aims for 236.2 GWh BESS by 2031–32, far above the current ~500 MWh installed.
- Tender Gaps – Existing tenders lack clarity on ancillary services, performance incentives, and usage parameters.
- C&I Growth – Leasing models are expanding eliminating high CapEx barriers in the C&I segment.

We Recommend:

- ▷ Business Models – Help stakeholders develop leasing and OpEx-driven ESS models tailored to C&I needs.
- ▷ Tender Support – Guide policy-makers on integrating technical performance and degradation factors into tenders.

[36] India: National Electricity Plan [access 10 Nov 2025]
[37] India's installed battery energy storage capacity [access 10 Nov 2025]
[38] DRYtraec®: Dry Battery Electrode Coating Technology [access 10 Nov 2025]

A Vibrant Ecosystem in Motion: India's Path Toward an Inclusive Energy Transition

The renewable energy and energy storage ecosystem in India is dynamic, vibrant, and full of enthusiasm to tackle the pressing challenges from climate change through clean power generation and storage. Along the whole value creation chain, stakeholders are full of optimism to strive for India's ambitious goals to reach net-zero and the set targets for renewable energy and energy storage deployment. The vast breadth of living conditions and technology implementation across this huge country probably demands a more holistic approach to facilitate an inclusive and economically feasible energy transition. Informa Markets is therefore as well engaged to support women and children to drive change and transform futures.

The 3^{rd} edition of the Battery Show India was a great success for all participants with 378 brands, 18126 visitors, 126 distinguished speakers, and 702 VIP & delegates present for knowledge exchange, vision creation, networking, and showcasing of the latest product trends.

Next year's edition of the Battery Show India will take place on 22, 23 & 24 October 2026 at the India Expo Mart & Centre, Greater Noida, India[39]. We from Active-Sites Consulting are going to be present, supporting the rise of this dynamic renewable energy and energy storage ecosystem in India and building bridges to Europe and other global markets.

Key Takeaways:

- High Enthusiasm – India's ecosystem shows strong optimism, inclusiveness, and pace in renewable and storage adoption.
- Policy–Industry Alignment – A strong match exists between government ambition and industry drive.
- Global Partnerships – EU–India and Indo-German cooperation will be crucial for scaling clean-energy goals.

We Recommend:

- ▷ Deep Collaboration – Enhance cross-border partnerships for joint standards, knowledge exchange, and scaling models.
- ▷ Global Readiness – Prepare Indian companies for global markets through sustainability and regulatory compliance pathways.

[39] The Battery Show India 4^{th} edition in 2026

Accelerating India's Clean-Energy Future – With Purpose

The Battery Show India 2025 showcased a nation accelerating toward clean-energy leadership. With renewables surpassing coal, strong policy signals through PLI and VGF, and a vibrant ecosystem of innovators, manufacturers, and global partners, the event highlighted India's growing capability to shape the next generation of battery and energy-storage solutions. From circularity frameworks to long-duration energy storage, the message was clear: **India is not just scaling – India is transforming.**

At Active-Sites Consulting, we turn these market signals into actionable pathways. We help stakeholders navigate India's evolving regulatory environment, enable localization and manufacturing strategies, and build the digital and circular frameworks essential for long-term competitiveness. By bridging policy, technology, and execution, we empower companies to participate meaningfully in India's fast-moving clean-energy transition.

→ **The momentum is here. Let's partner to build resilience, transparency, and sustainable growth – shaping India's clean-energy future, together.**

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