

ENERGY STORAGE

MODELS, TECHNOLOGIES, POSITIONING: THE CURRENT SITUATION FOR COMMERCIAL AND INDUSTRIAL BUILDINGS

April 2024



End-to-End INNOVATION

À propos de **SprintProject**

SprintProject puts competitive intelligence at the service of innovation.

SprintProject supports corporate groups in the Supply Chain, Food & Drink, Retail and FMCG sectors, in their innovation strategy, from strategic thinking to the implementation of practical solutions.

SprintProject, is a unique expertise that: consolidates strategic data and provides its clients with an exhaustive and exclusive monitoring service; raises awareness and educates decision-makers about innovation trends and new business models; leads and supports innovation and transformation in the ecosystems of the Supply Chain, Food and Beverage, Consumer Goods and Retail; helps and guides large groups and investors in their collaboration with start-ups; pilots large-scale innovative programs in a collaborative and multi-actor (public/private) mode.

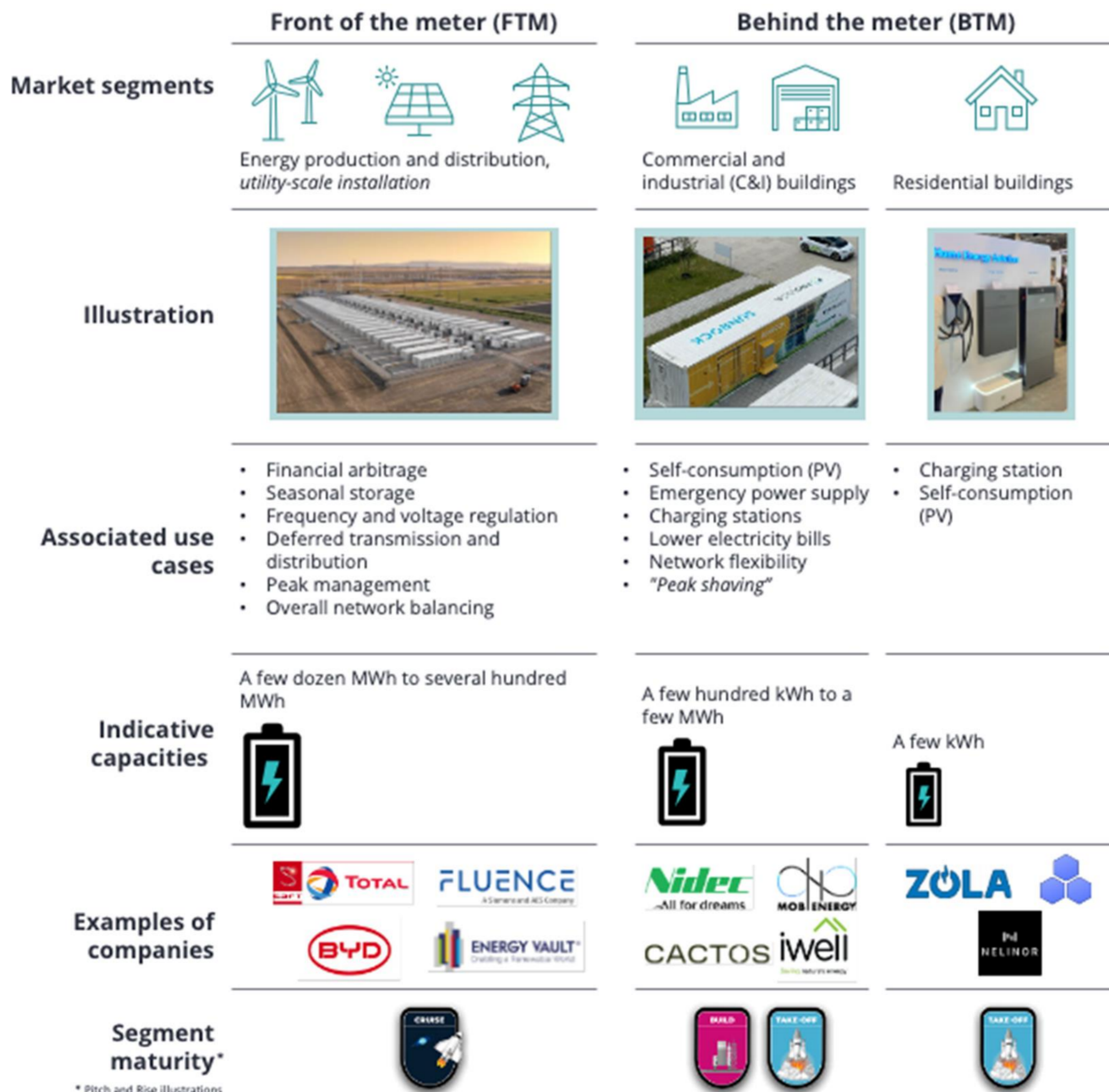
Executive summary

Against a backdrop of energy transition, and as a result of a combination of regulatory, market and societal factors, the energy paradigm in which various economic players operate is set to change. The owners and users of commercial and industrial (C&I) buildings will move from a simple consumer model to a 'prosumer' model. They will consume the energy they produce themselves.

We should therefore see a gradual transformation of logistics zones as the components of these new energy systems are integrated over the next few years:

- Local production of low-carbon energy;
- Self-consumption by the building;
- Energy storage;
- Carbon-neutral vehicles and associated infrastructure;
- An energy management and orchestration system (EMS).

Insight 01: technological energy storage solutions (battery, thermal, flywheel, STEP, CAES, power-to-gas, gravitational) do not address the same market segments or the same use cases.



Summary of the different market segments and associated use cases for energy storage

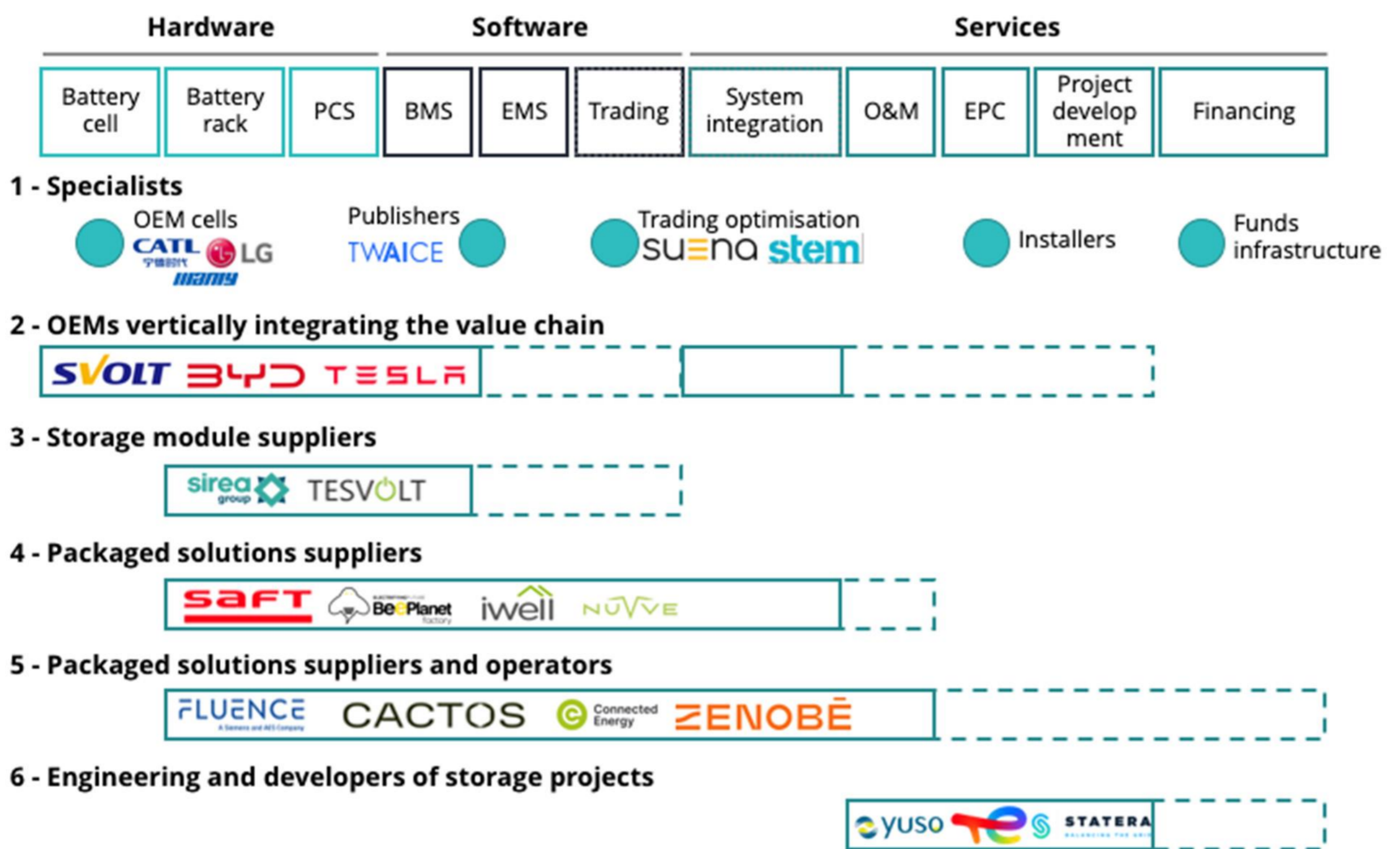
Insight 02: Battery storage is the most mature solution in the short and medium term for localised energy storage in C&I buildings that do not have major heating requirements.

Insight 03: LFP battery chemistry is now favoured by the stationary storage market, even though it is still emerging.

Insight 04: The market mechanism previously used mainly by large-scale storage installations (front-of-the-meter) are now being adapted to C&I building projects. This increases the profitability of projects.

Insight 05: From centralised energy production and storage, we are moving toward a decentralised market where C&I buildings will be players in the energy market.

Insight 06: Corporate businesses and OEMs have been moving into the C&I buildings market segment for 2 to 3 years. On the other hand, historically positioned start-ups and SMEs still have a head start, but for how long ?



The battery storage value chain and the different positions of the players

Insight 07: C&I buildings owners are exploring the potential of energy storage with start-ups but will deploy massively with more structured companies.

Insight 08: We will see an increase in localised renewable energy production in C&I buildings over the coming years (rooftop and shading solar panels).



Insight 09: The use cases for storage in C&I buildings will vary depending on a number of factors specific to each sector and industry (size of building, captive fleet of vehicles, building consumption, etc.).

Insight 10: France is lagging behind other European countries when it comes to energy storage and its use in commercial and industrial buildings.

Insight 11: The market is still emerging, but some players are taking the lead and testing these technologies with a view to integrating them into their activities.

Insight 12: Real estate players, landowners and operators need to start thinking now about their objectives and the integration of storage into their energy transition roadmap.

Insight 13: Energy storage can open up commercial opportunities for certain companies in different sectors.

In conclusion, this in-depth analysis of energy storage highlights the key dynamics shaping a market in the throes of change. As value chains become more structured and new business models emerge, it becomes crucial for companies to position themselves with foresight in the face of this energy revolution.

The conclusions drawn from our analyses provide decision-makers with guidance for their strategic choices.

The question now is one of action: how will companies adapt to these profound changes, and what place will you choose to occupy in this new energy ecosystem?

At SprintProject, our expertise lies in our ability to shed light on these complex choices. We don't just analyse trends; we help companies to define and implement strategies that will enable them to take advantage of the opportunities offered by this energy transition.

Are you interested in this topic and would you like support in your approach? Let's discuss your projects together and explore solutions tailored to your needs.

CONTACT

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