



SolarPower  
Europe

# Solarindustrie in Europa

Solarbranchentag

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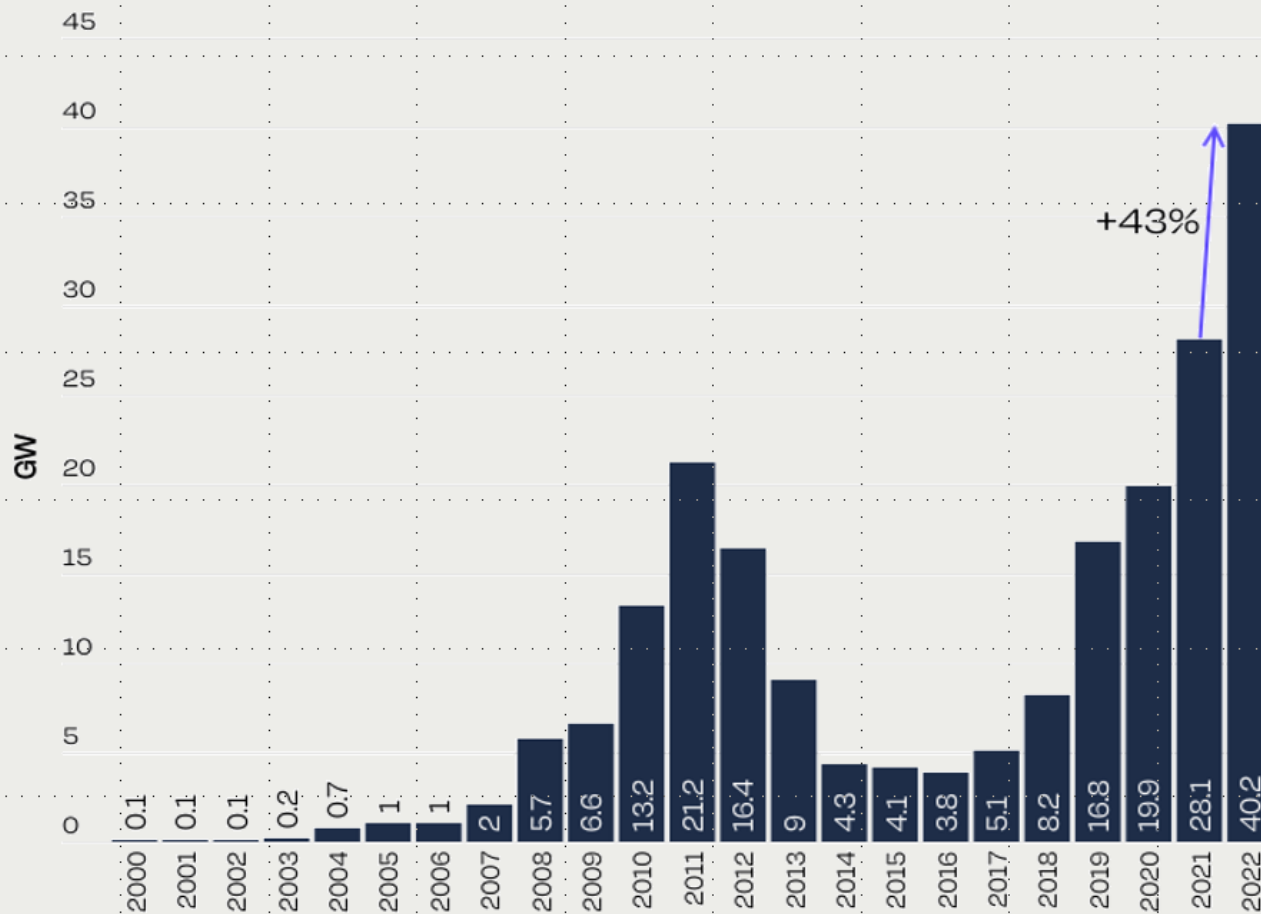


# SOLAR SOARS

**41 GW** in 2022: 12 million more solar-powered homes in the EU

## Another all-time record in 2022

EU-27 Annual Solar PV Installed Capacity 2000-2022

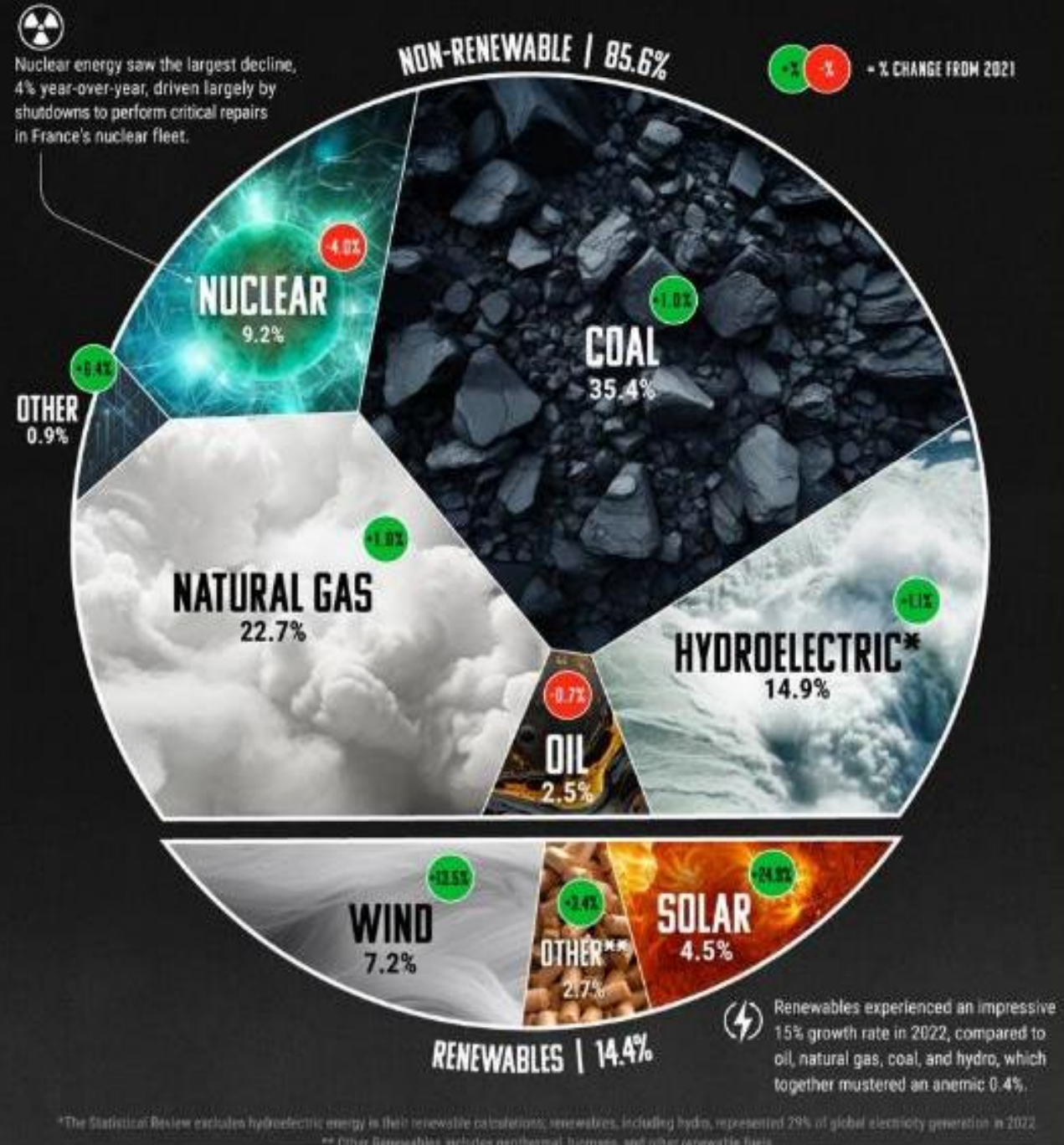


Source: Global Market Outlook 2023, SolarPower Europe

# But there is still a long way to go



Nuclear energy saw the largest decline, 4% year-over-year, driven largely by shutdowns to perform critical repairs in France's nuclear fleet.

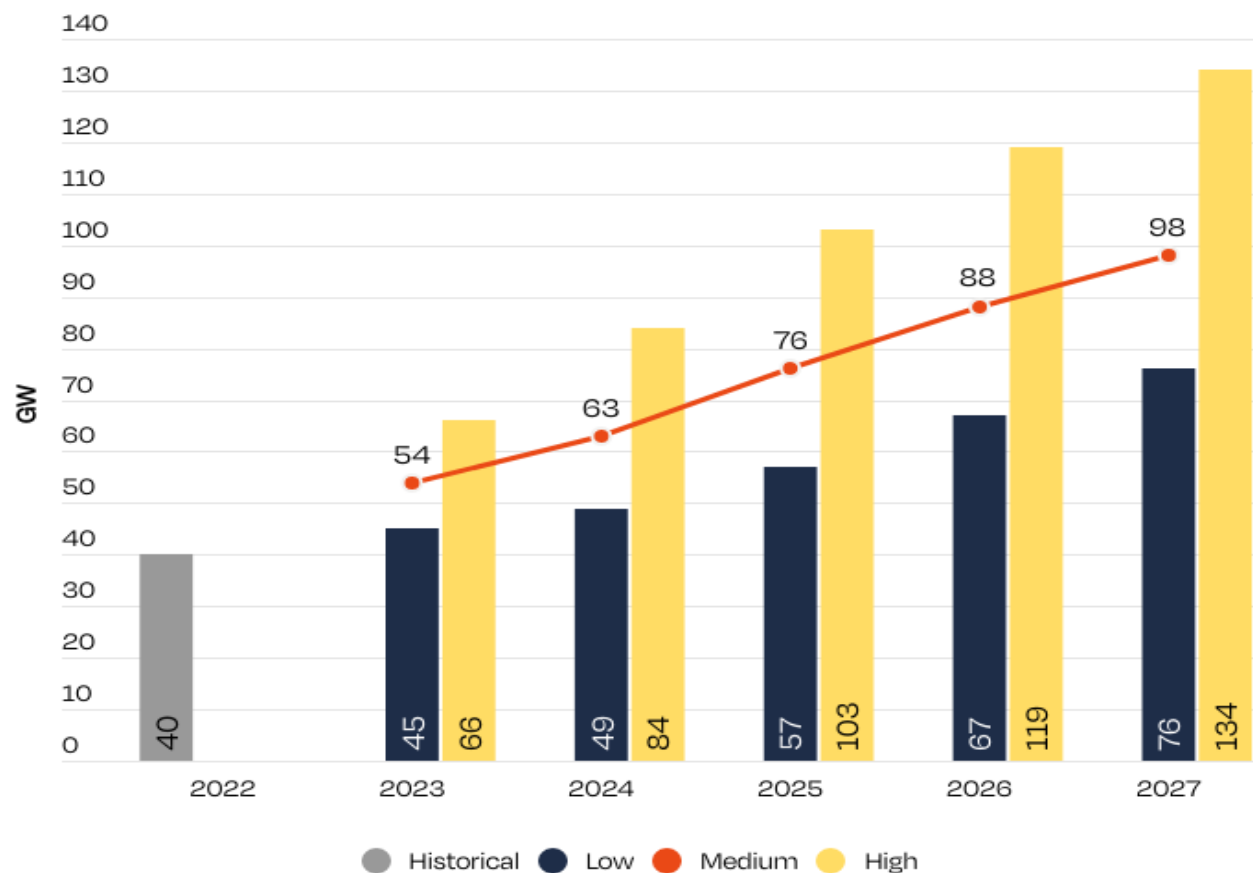


**On the bright side: the world is at “the beginning of the end” of the fossil fuel era**

*Fatih Birol, IEA, Financial Times 12 September 2023*



# Further strong growth ahead

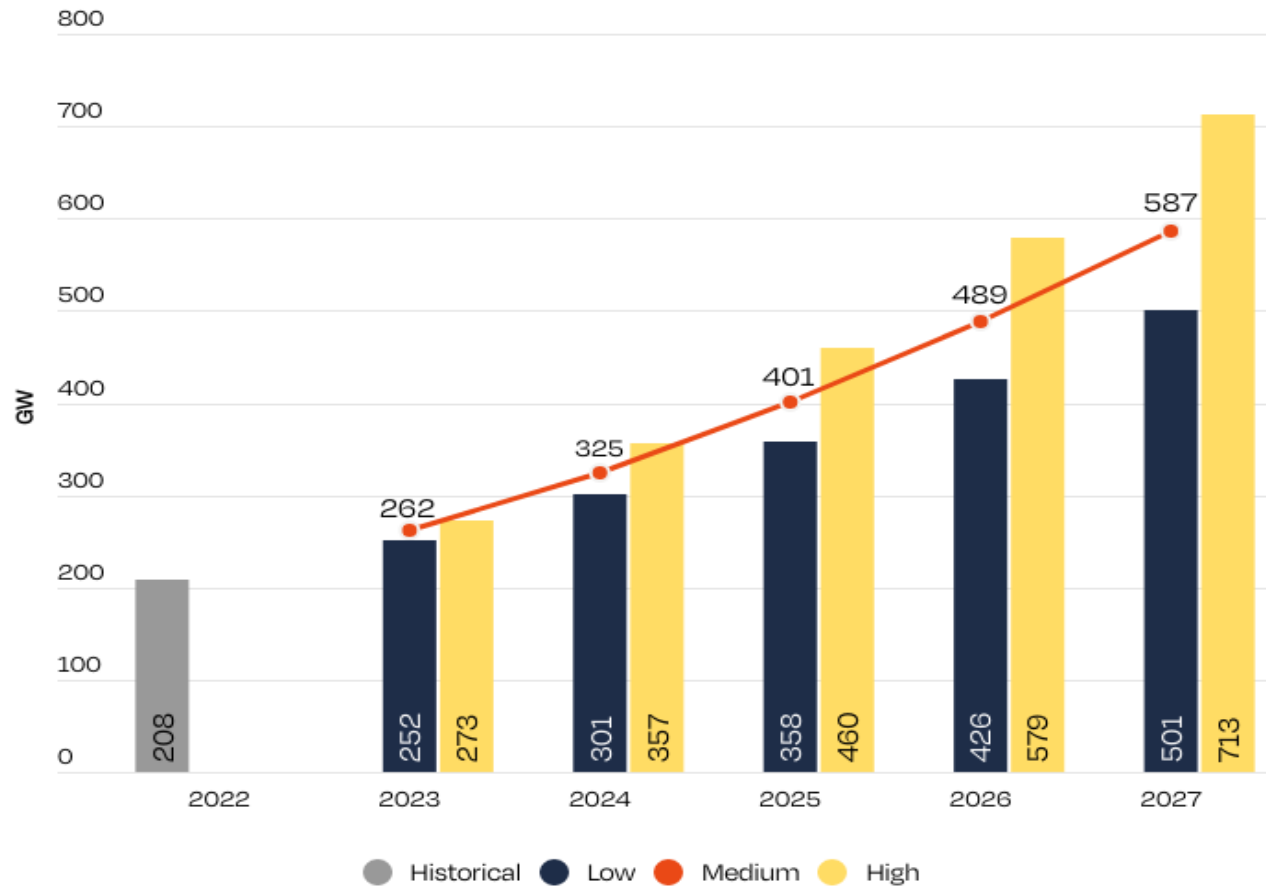


Source: Global Market Outlook 2023, SolarPower Europe

The next 5 years until 2027 will see further strong growth, with a nearly 54 GW annual solar market already in 2023 and reaching 98 GW in 2027.

## EU-27 Total Solar PV Capacity Scenarios 2023-2027

# Towards 600 GW in just 4 years

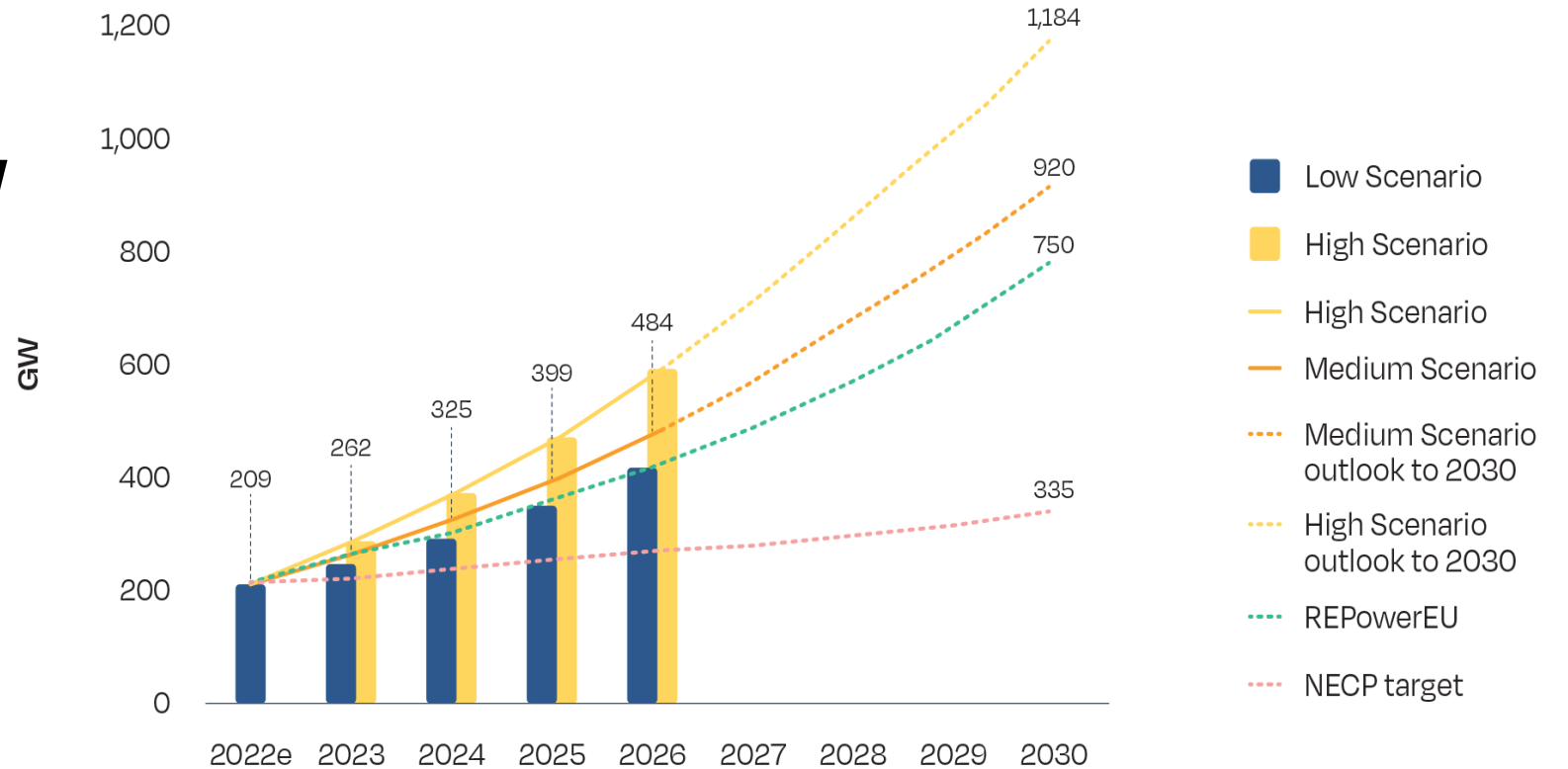


Source: Global Market Outlook 2023, SolarPower Europe

Cumulative capacity forecast 2023-2027 shows continuous, two-digit annual growth rates. The EU solar power generation fleet will more than double within four years to 587 GW in our Medium Scenario.

# EU 2030 Medium Scenario: 920 GW

## EU-27 Total Solar PV Capacity Scenarios 2023-2030



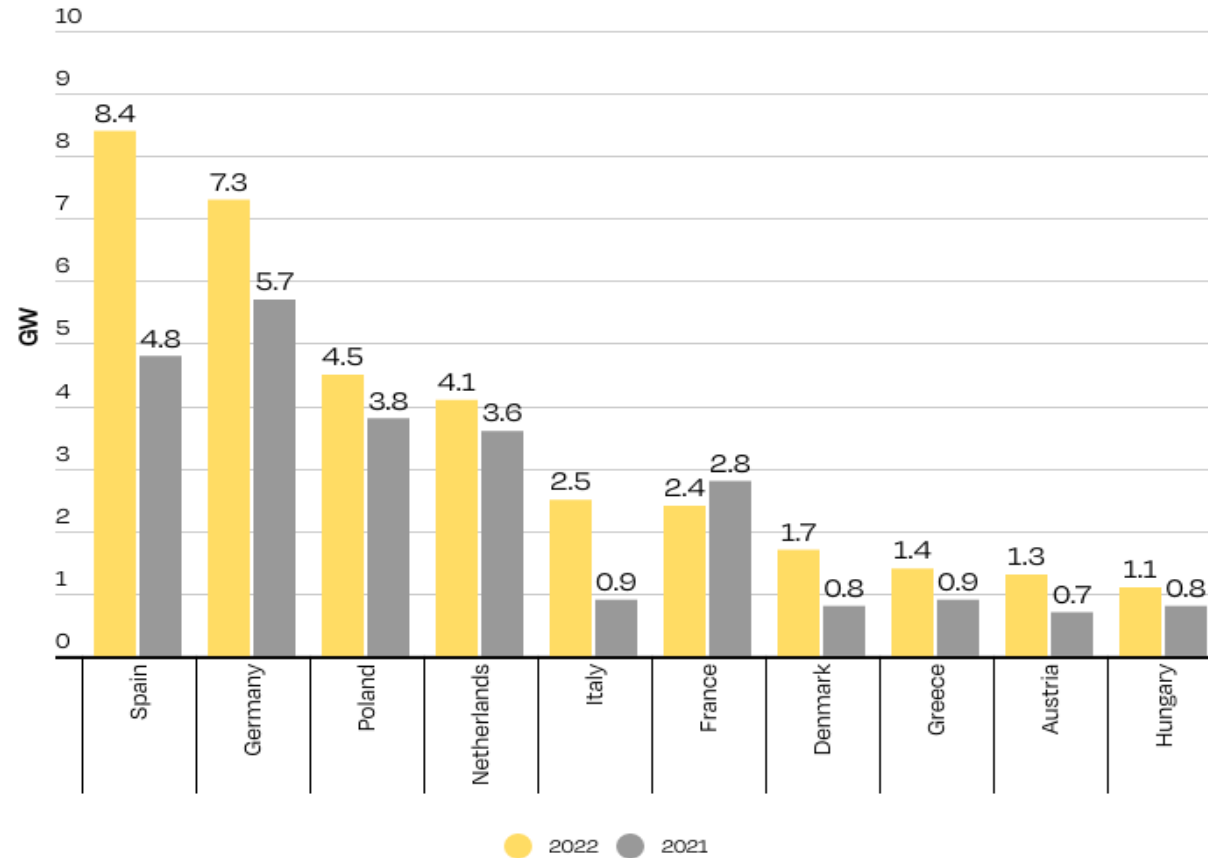
Source: EMO 2022, SolarPower Europe

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Total EU solar power fleet is expected to increase from 209 GW installed today to about 400 GW in 2025, and 920 GW in 2030. This is much higher than aggregate capacity target from NECPs (335 GW). While 2025 number is inline with EU Commission scenario (400 GW), the 2030 number is above EC 2030 target (750 GW).

# Germany among the TOP 3 European Markets

EU27 Top 10 Solar PV Markets 2022 vs 2021



Source: Global Market Outlook 2023, SolarPower Europe

Spain surpassed Germany in 2022 as Europe's largest solar market. Italy is now part of the top 5 as France installs less in 2022 relative to 2021. Among the Top 10, there are only 2 newcomers (Austria & Hungary)

**Will Europe's Green Deal also be "Made in Europe"?**





***“We will re-shore manufacturing to Europe,  
whatever it takes”***

*EU-Energy Commissioner Kadri Simson  
SolarPower Summit, March 2022*

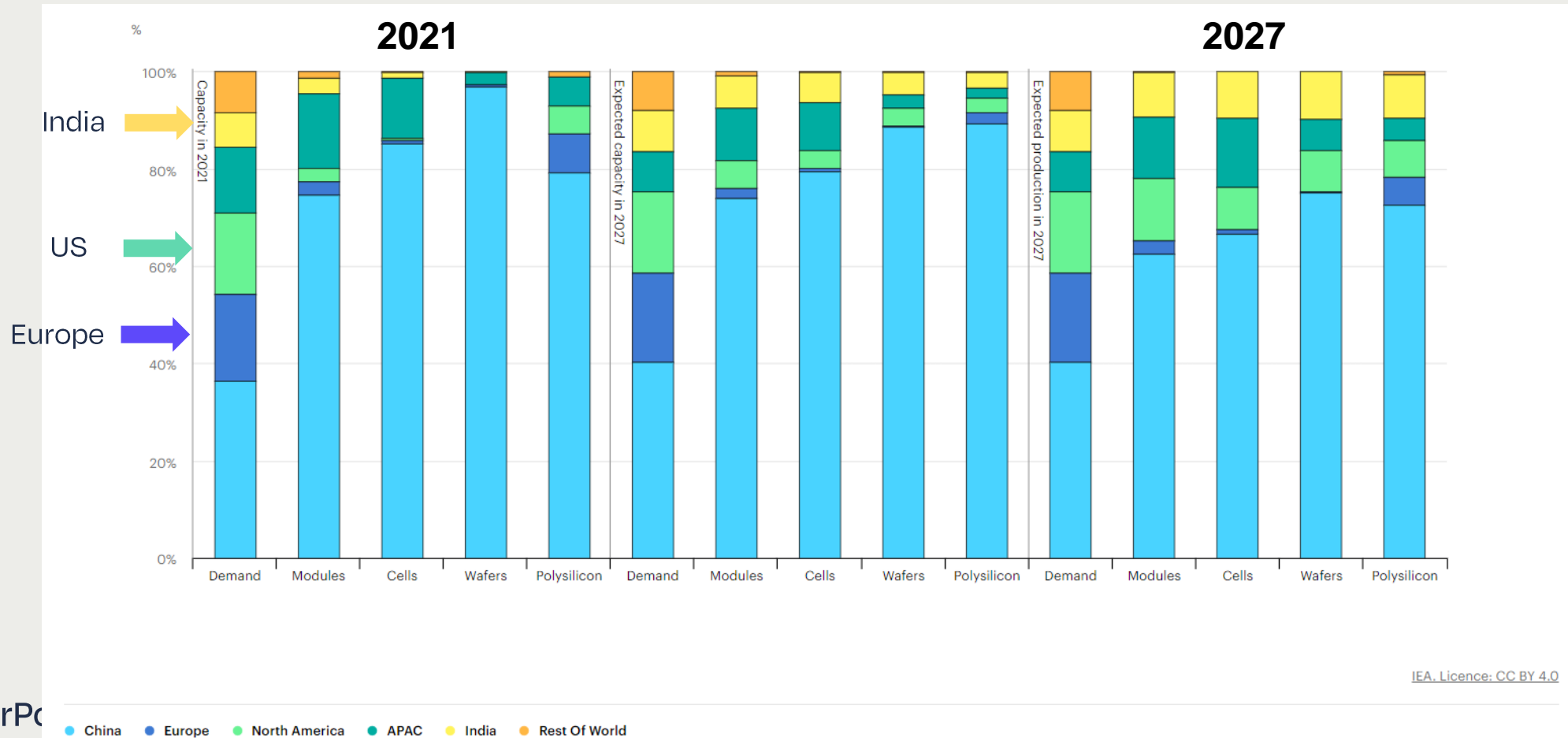


***“The future of our clean tech industry has to be made in Europe”***

*EU Commission President Ursula Von der Leyen  
State of the Union Speech, 13 September 2023*

# Today, solar supply chains rely almost entirely on China

Diversification of global PV supply is happening. Solar industrial strategies in India and US are yielding results. Europe is left behind.

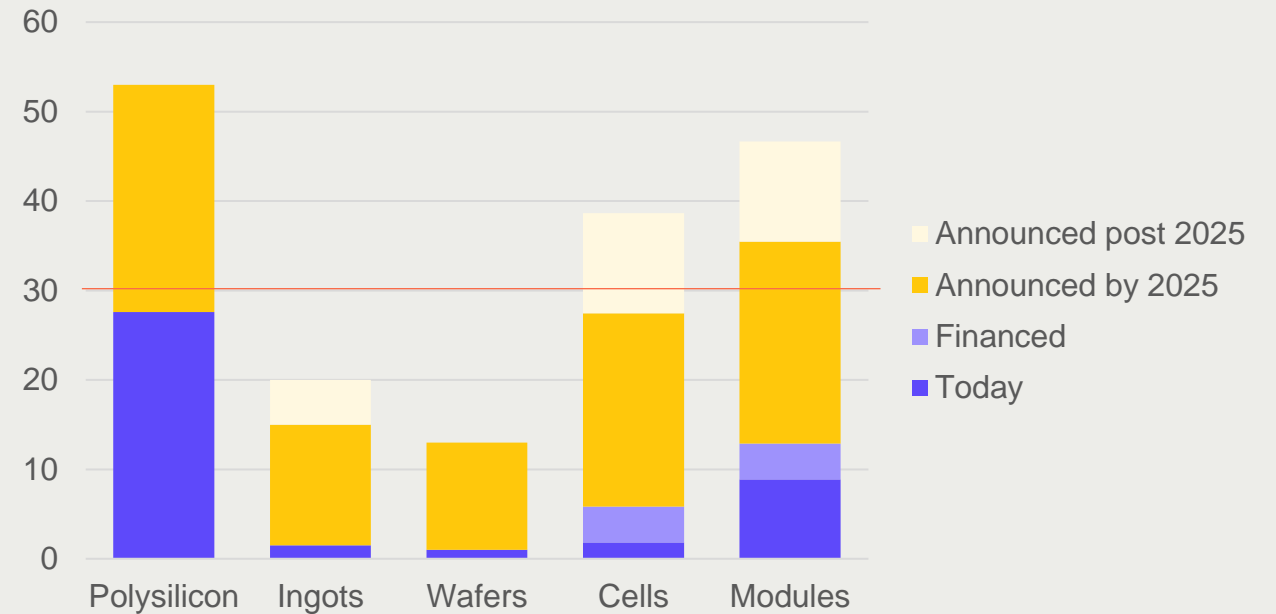


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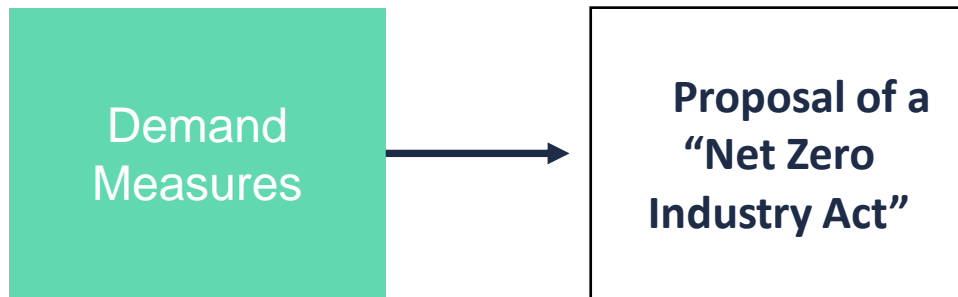
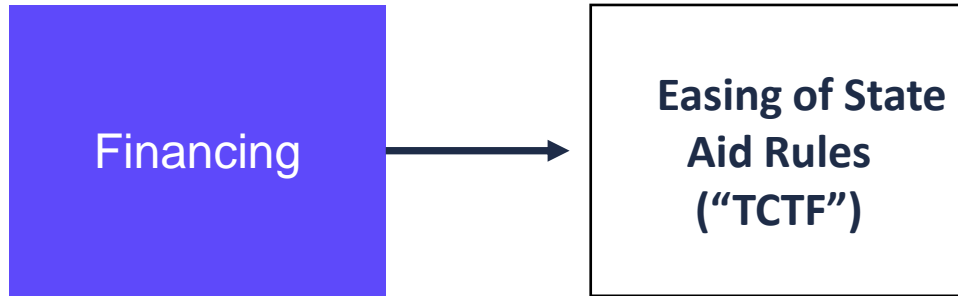
# Europe's manufacturing is far from scale needed

European Ambition: 30 GW by 2030 across the whole supply chain

## Current and forecasted EU production capacity



# European Green Deal Industrial Plan – more needs to be done



Financing frameworks are inadequate to reaching the 2030 ambition for solar PV supply chains in Europe. Estimated finance gap of around **EUR 4.7-6.4bn annual support** for a duration of 10 years in order to reach a competitive and sustainable PV value chain in Europe of at least 30GW

- Revise the **State Aid rules** under the Temporary Crisis and Transition Framework, allow for OPEX support and improve simplicity (matching clause 86)
- Establish a **European financial instrument** dedicated to Net Zero Strategic technologies with high dependency on one source of supply -> Solar Manufacturing Bank

**Non-price criteria in public** procurement and auctions on sustainability and resilience should apply to specific auctions -> set up **Resilience auctions across Member States for a small but growing segment** commensurate with the EU manufactured capacity objectives of 30GW by 2030.



# Thank you!

Walburga Hemetsberger  
CEO SolarPower Europe

