

Horizons

**S&P Global**

Energy

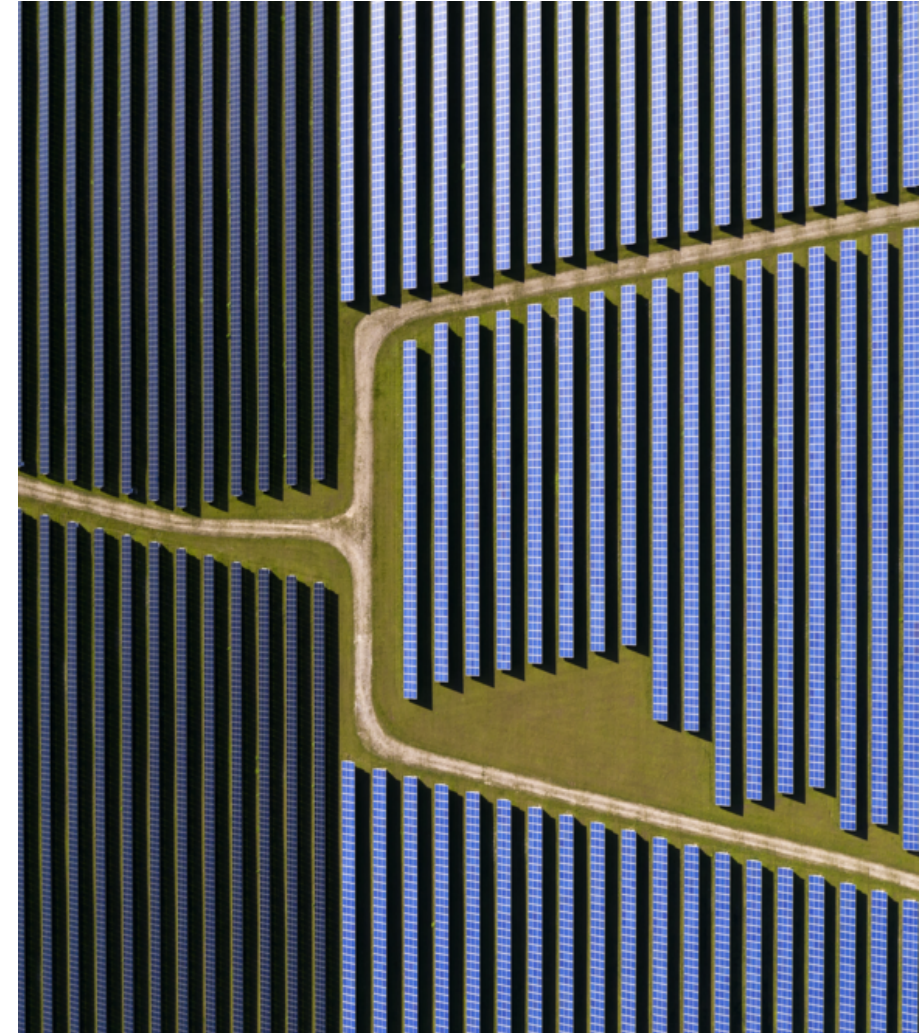
GLOBAL CLEAN ENERGY TECHNOLOGY / PRESENTATION

# How EU Solar Markets Took Different Paths

SolarPower Summit, Brussels

Josefin Berg / Renewables Markets / Associate Director

May 5, 2026

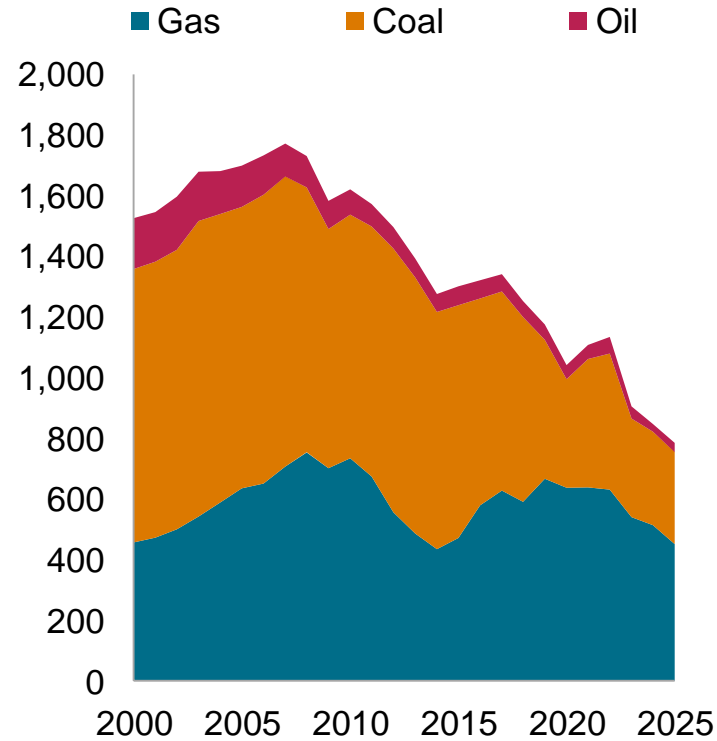


# Europe's energy transition is underway; power is the main driver of falling emissions

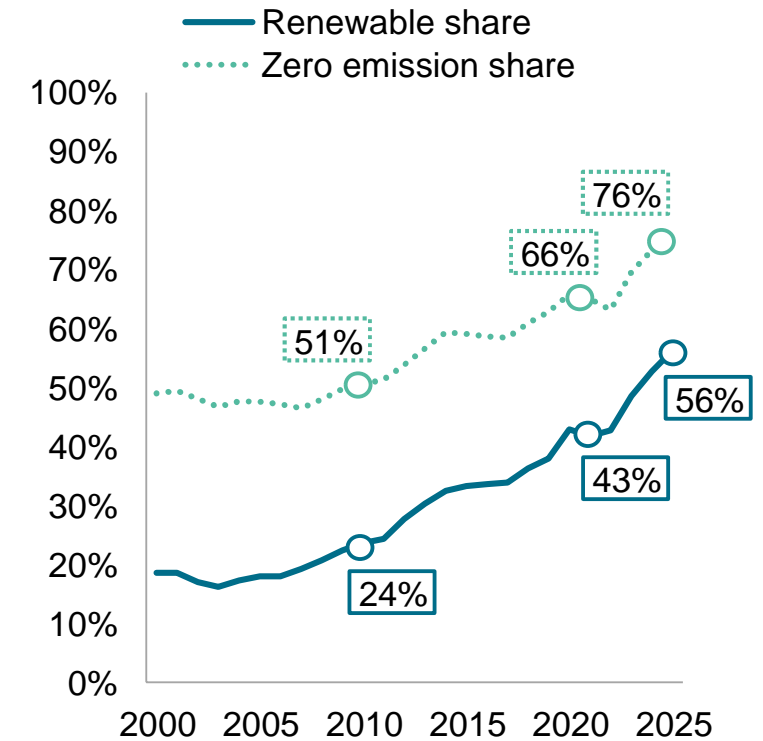
## Total EU 27+3 GHG emissions reduction since 1990



## EU27+3 composition (TWh)



## EU27+3 share of power generation from renewable and zero emission technology

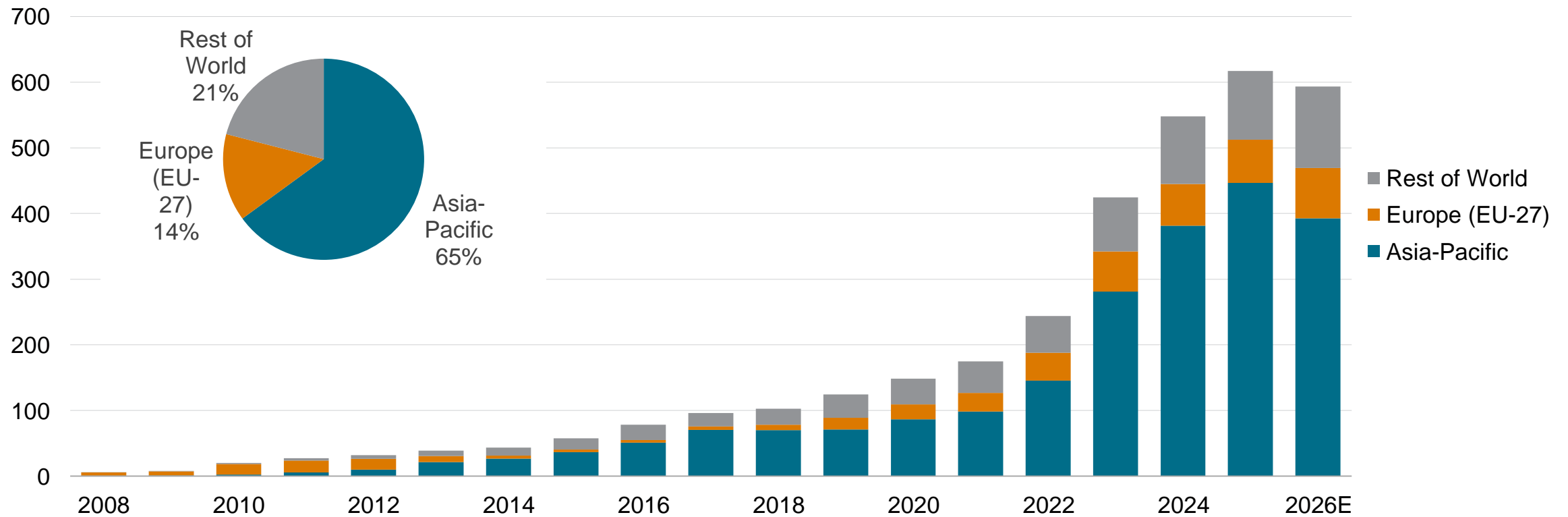


Renewables: Hydro, wind, solar, geothermal, combustible renewables.  
Zero-emission: Renewables and nuclear

Data compiled: December 2025  
Source: S&P Commodity Insights.

# EU-27 represents 14% of the world's installed solar PV capacity

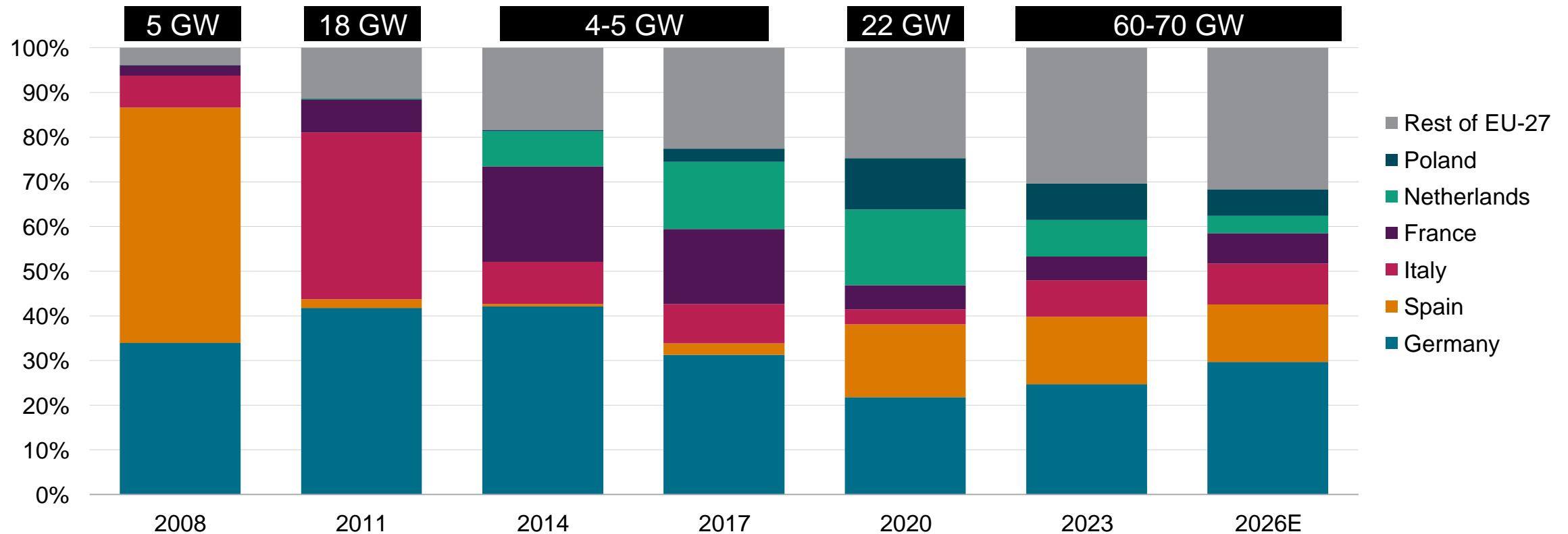
## World solar PV annual installations (GW-dc)



Data compiled: April 2026  
Source: S&P Global Energy

The markets have taken different paths, from high to low subsidies, from ground to roof focus. Today's PV market has grown more diverse.

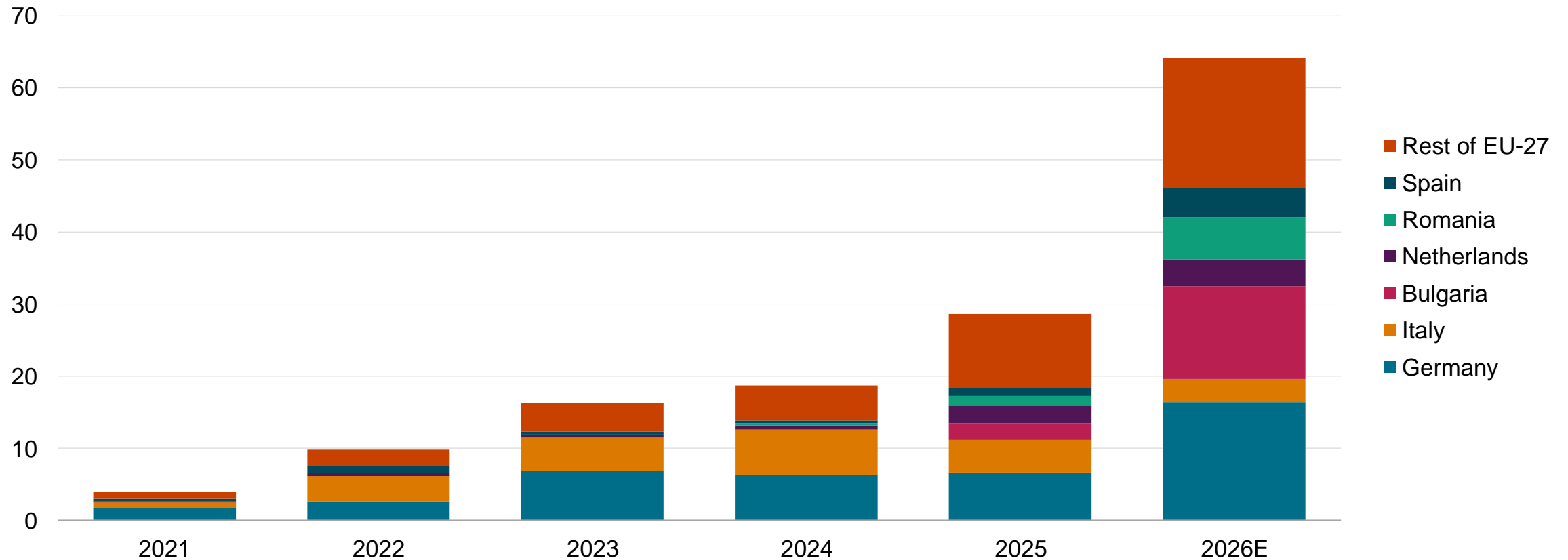
**Solar PV annual share of EU-27 installations (GW-dc)**



Data compiled: April 2026  
Source: S&P Global Energy

# Energy storage accelerates in 2026, further transforming the electricity market

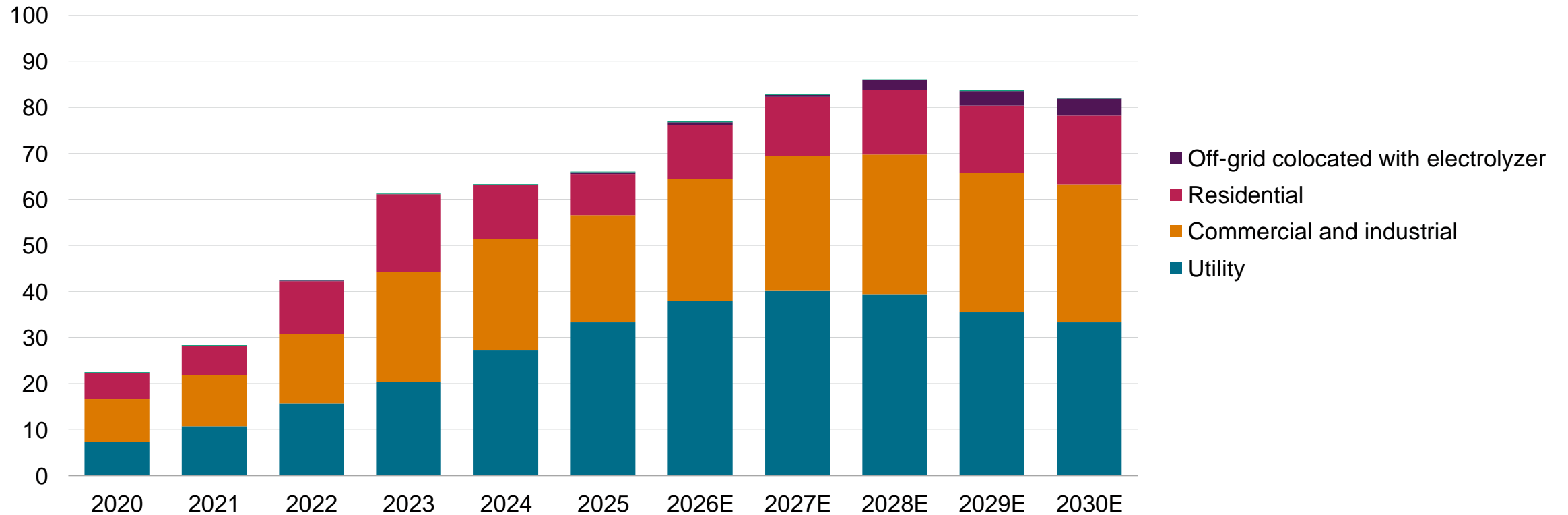
## Europe annual BESS installations (GWh-ac)



Data compiled: April 2026  
Source: S&P Global Energy

# Accelerate EU, greater uptake of distributed PV and inertia of planned ground-mount systems can push annual additions to peak above 80 GW

## EU-27 solar PV gross annual installations (GW-dc)



Data compiled: April 2026  
Source: S&P Global Energy

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