

Wind solar and energy storage industry destocking





Overview

Is China entering a new era of energy storage demand?

Mainland China accounts for most of the global energy storage demand, driven in the near term by regional requirements for new utility-scale wind and solar projects to include energy storage capacity. However, the Chinese market is entering an era of change.

How will the energy storage mandate impact China?

S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand. With China accounting for around 56% of the global energy storage demand in 2024, the impact of such a policy change will be massive.

How will China's energy storage policy affect global demand?

“China was on-track to install over 60% of all utility scale storage globally in 2025 and so in the absence of further policy changes, about 45% of global demand has just been wiped away,” Hilton says. The ripple effect on the global demand-supply balance will involve further downward pressure on energy storage prices.

How will wind & solar payments work in 2025?

New policy introduced in February 2025 requires wind and solar payment mechanisms to move toward more market-based structures, where 100% of wind and solar generation is to be traded in the wholesale market with local governments left to define their own implementation details by the end of the year.



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