

RENEWABLES 2015 GLOBAL STATUS REPORT

WHERE WE STAND NOW

Laura Williamson

Outreach & Communication
Manager

laura.williamson@ren21.net

CESC Webinar

24 September 2015

2015



REN21 is a multi stakeholder network dedicated to the rapid uptake of renewable energy worldwide.

Science & Academia:

IIASA, ISES, SANEDI, TERI, Fundacion Bariloche

NGOs:

CURES, GFSE, Greenpeace,
ICLEI, ISEP, JREF, RCREEE,
WCRE, WFC, WRI, WWF

Industry Associations:

ACORE, ARE, CEC, CREIA, EREF,
GWEC, IGA, IHA, IREF, WBA,
WWEA



International Organisations:

ADB, EC, ECREEE, GEF, IEA,
IRENA, UNDP, UNEP,
UNIDO, World Bank

National Governments:

Brazil, Denmark, Germany,
India, Norway, Spain,
Uganda, UAE, UK

REN21 Renewables 2015 Global Status Report



www.ren21.net/gsr

Launched at Vienna Energy Forum on 18 June 2015

Network of over 500 contributors, researchers & reviewers worldwide

The report features:

- Global Overview
- Market & Industry Trends
- Investment Flows
- Policy Landscape
- **Distributed Renewable Energy for Energy Access**
- Energy Efficiency
- Feature: Using Renewables for Climate Change Adaptation

The report covers:

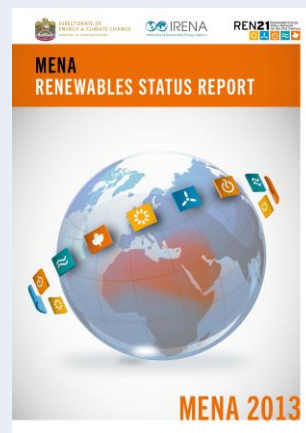
- All renewable energy technologies
- The power, heating & cooling, and transport sector
- Energy Efficiency



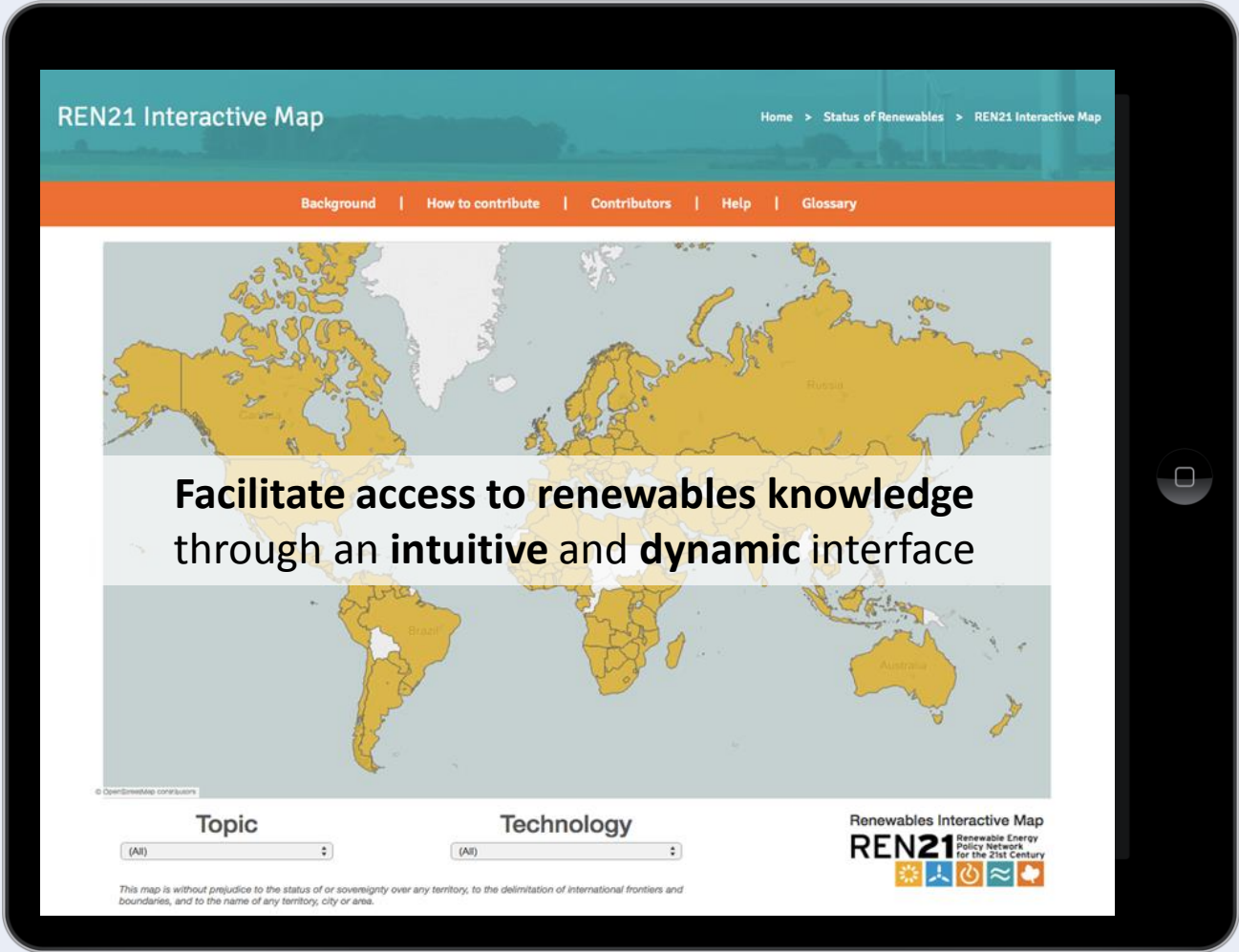
Regional Renewable Energy & Energy Efficiency Status Reports

REN21 produces regional status reports on renewable energy and energy efficiency

- **ECOWAS** launched in November 2014
- **SADC** to be launched at SAIREC, October 2015
- **UNECE** report to be launched at COP21, December 2015
- **EAC** to be launched early 2016



REN21 Renewables Interactive Map



www.ren21.net/map













A Decade Of Renewable Energy Growth Surpassing Expectations

The evolution of renewable energy has surpassed all expectations.

Global installed capacity and production from all renewable technologies have increased substantially.

Significant cost reductions for most technologies.

Supporting policies spread throughout the world.

		START 2004	2013	2014
INVESTMENT				
New investment (annual) in renewable power and fuels	billion USD	45	232	270
POWER				
Renewable power capacity (total, not including hydro)	GW	85	560	657
Renewable power capacity (total, including hydro)	GW	800	1,578	1,712
 Hydropower capacity (total)	GW	715	1,018	1,055
 Bio-power capacity	GW	<36	88	93
 Bio-power generation	TWh	227	396	433
 Geothermal power capacity	GW	8.9	12.1	12.8
 Solar PV capacity (total)	GW	2.6	138	177
 Concentrating solar thermal power (total)	GW	0.4	3.4	4.4
 Wind power capacity (total)	GW	48	319	370
HEAT				
 Solar hot water capacity (total)	GW _{th}	86	373	406
TRANSPORT				
 Ethanol production (annual)	billion litres	28.5	87.8	94
 Biodiesel production (annual)	billion litres	2.4	26.3	29.7

REN21 Renewables 2015 Global Status Report



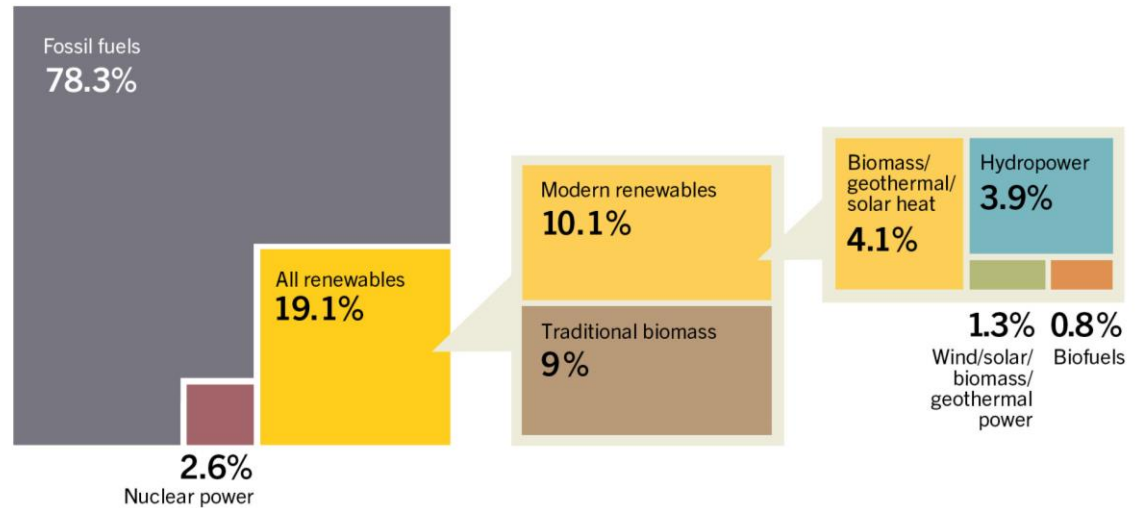
Renewable Energy in the World

Renewable energy provided an estimated **19.1%** of global final energy consumption in 2013.

The share of **modern renewable energy** increased to 10.1%.

The share of **traditional biomass** was of 9%, same as in 2012.

Estimated Renewable Energy Share of Global Final Energy Consumption, 2013



REN21 *Renewables 2015 Global Status Report*

REN21 Renewable Energy Policy Network for the 21st Century



Renewable Energy “Champions” - annual investment/capacity additions

ANNUAL INVESTMENT / NET CAPACITY ADDITIONS / PRODUCTION IN 2014

	1	2	3	4	5
Investment in renewable power and fuels (not including hydro > 50 MW)	China	United States	Japan	United Kingdom	Germany
Investment relative to annual GDP ¹	Burundi	Kenya	Honduras	Jordan	Uruguay
 Geothermal power capacity	Kenya	Turkey	Indonesia	Philippines	Italy
 Hydropower capacity	China	Brazil	Canada	Turkey	India
 Solar PV capacity	China	Japan	United States	United Kingdom	Germany
 CSP capacity	United States	India	–	–	–
 Wind power capacity	China	Germany	United States	Brazil	India
 Solar water heating capacity ²	China	Turkey	Brazil	India	Germany
 Biodiesel production	United States	Brazil	Germany	Indonesia	Argentina
 Fuel ethanol production	United States	Brazil	China	Canada	Thailand

REN21 Renewables 2015 Global Status Report



Renewable Energy “Champions” – total capacity

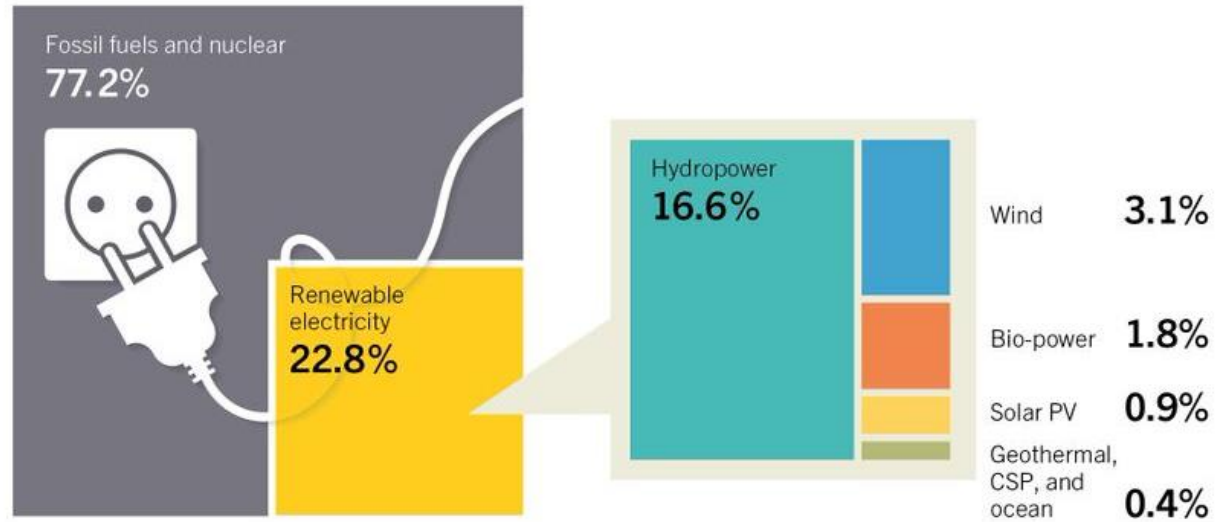
TOTAL CAPACITY OR GENERATION AS OF END-2014					
	1	2	3	4	5
POWER					
Renewable power (incl. hydro)	China	United States	Brazil	Germany	Canada
Renewable power (not incl. hydro)	China	United States	Germany	Spain / Italy	Japan / India
Renewable power capacity per capita (not incl. hydro)	Denmark	Germany	Sweden	Spain	Portugal
Biopower generation	United States	Germany	China	Brazil	Japan
Geothermal power capacity	United States	Philippines	Indonesia	Mexico	New Zealand
Hydropower capacity ⁴	China	Brazil	United States	Canada	Russia
Hydropower generation ⁴	China	Brazil	Canada	United States	Russia
Concentrating solar thermal power (CSP)	Spain	United States	India	United Arab Emirates	Algeria
Solar PV capacity	Germany	China	Japan	Italy	United States
Solar PV capacity per capita	Germany	Italy	Belgium	Greece	Czech Republic
Wind power capacity	China	United States	Germany	Spain	India
Wind power capacity per capita	Denmark	Sweden	Germany	Spain	Ireland
HEAT					
Solar water collector capacity ²	China	United States	Germany	Turkey	Brazil
Solar water heating collector capacity per capita ²	Cyprus	Austria	Israel	Barbados	Greece
Geothermal heat capacity ³	China	Turkey	Japan	Iceland	India
Geothermal heat capacity per capita ³	Iceland	New Zealand	Hungary	Turkey	Japan

REN21 Renewables 2015 Global Status Report



Power Sector

Estimated Renewable Energy Share of Global Electricity Production, End-2014



Based on renewable generating capacity in operation at year-end 2014.

REN21 *Renewables 2015 Global Status Report*



- Renewables accounted **27.7%** of global power generation capacity and **22.8%** of global electricity demand.
- Renewables made up for **59%** of net additions to global power capacity.
- Total RE power capacity: **1712 GW**, an increase of more than 8.5% over 2013.



Heating & Cooling

Energy use for heat accounted for about half of total world final energy consumption in 2014.

Small but growing modern renewable energy share of final global heat demand: **approx. 8%**.

Trends:

- Growing interest, although advanced systems represent a small fraction of the global market
- Slow growth but vast potential—key for the energy transition



Transport

Renewable energy accounted for an estimated **3.5%** of global energy demand for road transport in 2013, up from **2%** in 2007.

Primary focus of policies, markets, industry:
liquid biofuels

Trends in the development of **gaseous fuels** and **electricity** create pathways for the integration of renewables into transportation.

Growing interest in new applications and markets for biofuels.



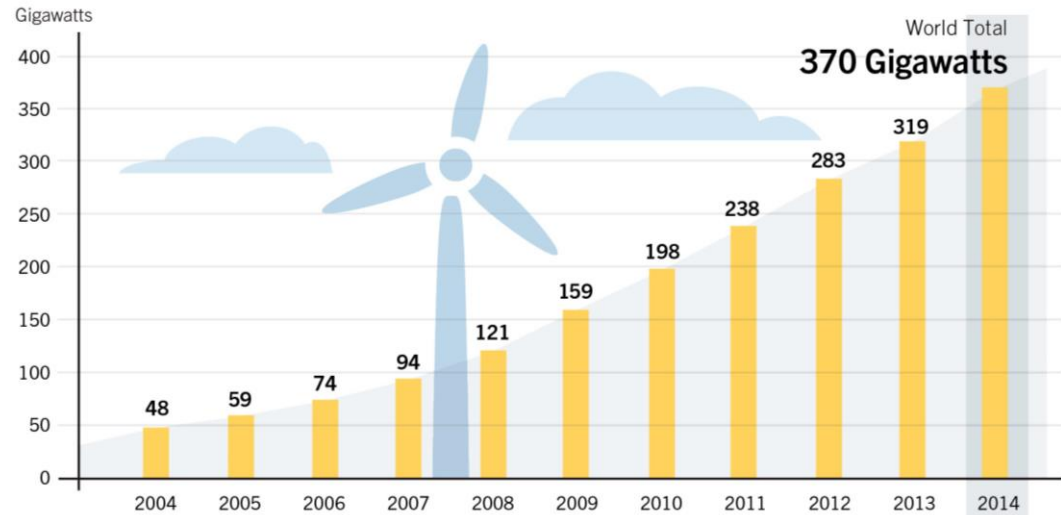
Wind Power – total global capacity

51 GW of capacity were added

Total capacity: **370 GW**

Offshore, an estimated **1.7 GW** of grid-connected capacity was added in 2014, for a world total exceeding **8.5 GW**

Wind Power Global Capacity, 2004–2014



REN21 *Renewables 2015 Global Status Report*

REN21 Renewable Energy Policy Network for the 21st Century



Solar Photovoltaics (PV) – total global capacity

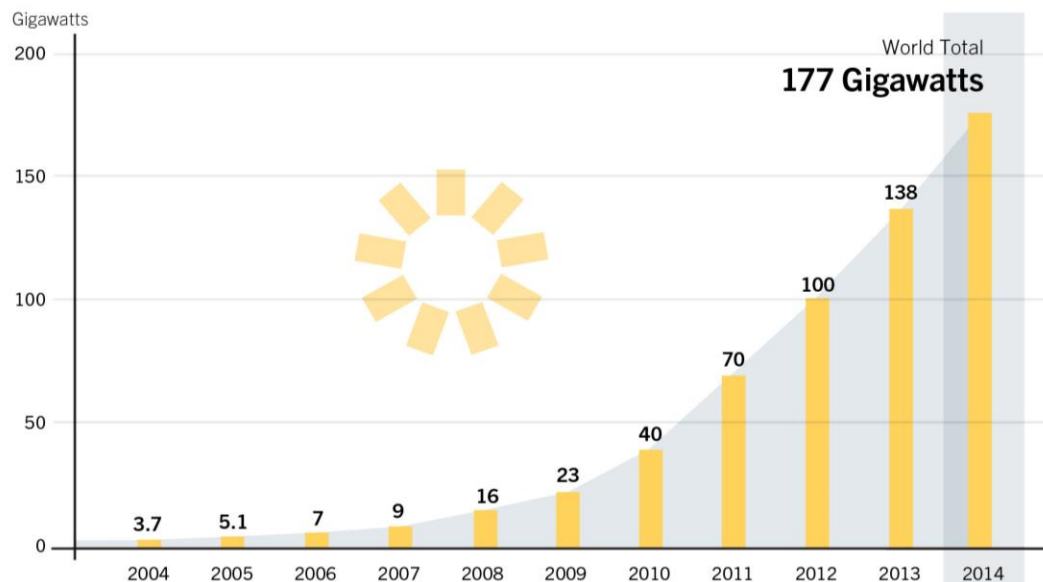
Solar PV:

- **+40 GW** added
- Total capacity: **177 GW**

More than 60% of all PV capacity in operation worldwide at the end of 2014 was **added over the past three years.**

Asia eclipsed all other markets, accounting for almost **60%** of global additions.

Solar PV Global Capacity, 2004–2014



REN21 *Renewables 2015 Global Status Report*

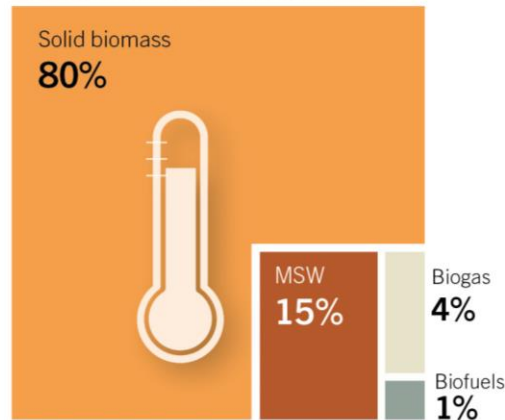
REN21 Renewable Energy Policy Network for the 21st Century



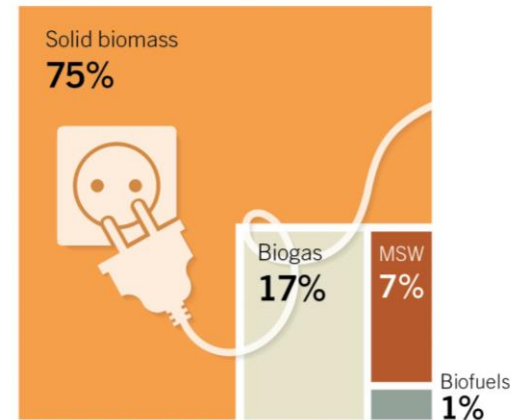
Bioenergy

Shares of Biomass Sources in Global Heat and Electricity Generation, 2014

Biomass Sources in **Heat Generation**



Biomass Sources in **Electricity Generation**



Solid biomass shares include both traditional and modern bioenergy from fuelwood, bagasse, black liquor, animal waste, and others.

REN21 *Renewables 2015 Global Status Report*



Total primary energy demand from biomass was approximately **16,250 TWh** (58.5 EJ).

Biomass was used to produce an estimated **12,500 TWh** (45 EJ) of heat (addition of 9GW_{th}).

Bio-power capacity increased by an estimated **5 GW** in 2014 to a total of approx. 93 GW.



Solar Thermal Heating & Cooling

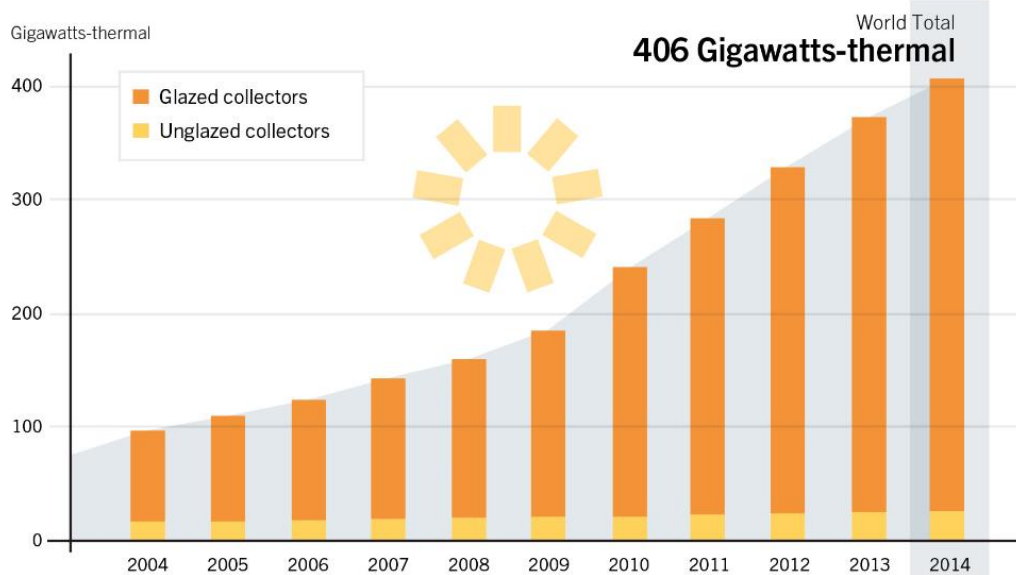
Cumulative capacity of all collector types in operation of 374.7 GWth (+ 44 GWth)

China accounts for nearly **81%** of the global market.

2014 Trends:

- focus on glazed water collectors
- slowdown in market growth continued in 2014
- China seeing a trend away from market to commercial

Solar Water Heating Collectors Global Capacity, 2004–2014



Data are for solar water collectors only (not including air collectors).

REN21 *Renewables 2015 Global Status Report*



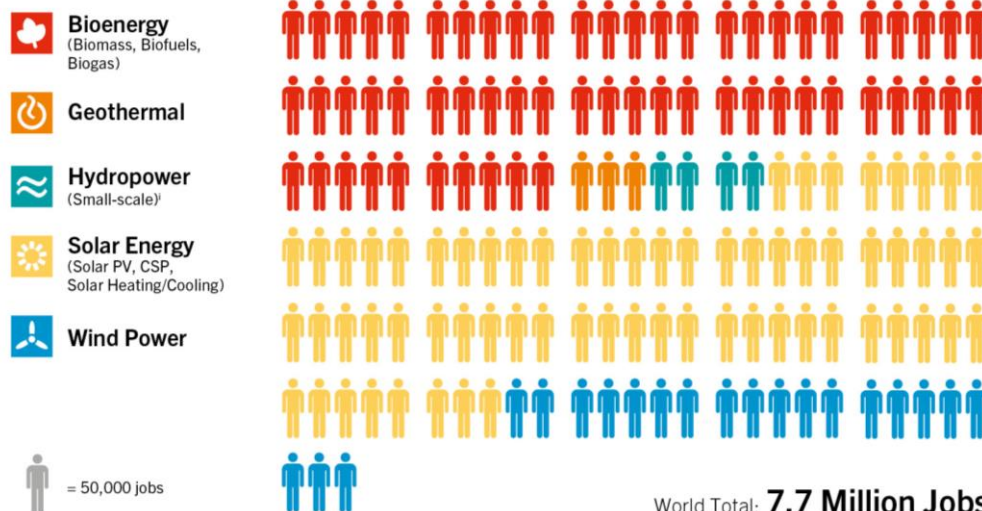
Jobs in Renewable Energy

Global employment continued to increase

An estimated **7.7 million** direct or indirect jobs in the renewable energy industry

Global wind power employment crossed the 1 million jobs threshold in 2014

Jobs in Renewable Energy, 2014



i - Employment information for large-scale hydropower not included.

REN21 *Renewables 2015 Global Status Report*

Source: IRENA

REN21 Renewable Energy Policy Network for the 21st Century



REN21 Renewable Energy Policy Network for the 21st Century

Global Investment in Renewable Energy

Global new investment estimated
USD 270.2 billion in 2014

(including hydropower USD 301 billion)

Reasons for the increase:

- Increase in solar power installations in China and Japan
- Investment in solar power up **25%**
- Record investment in offshore wind projects in Europe

Global New Investment in Renewable Power and Fuels, Developed and Developing Countries, 2004–2014

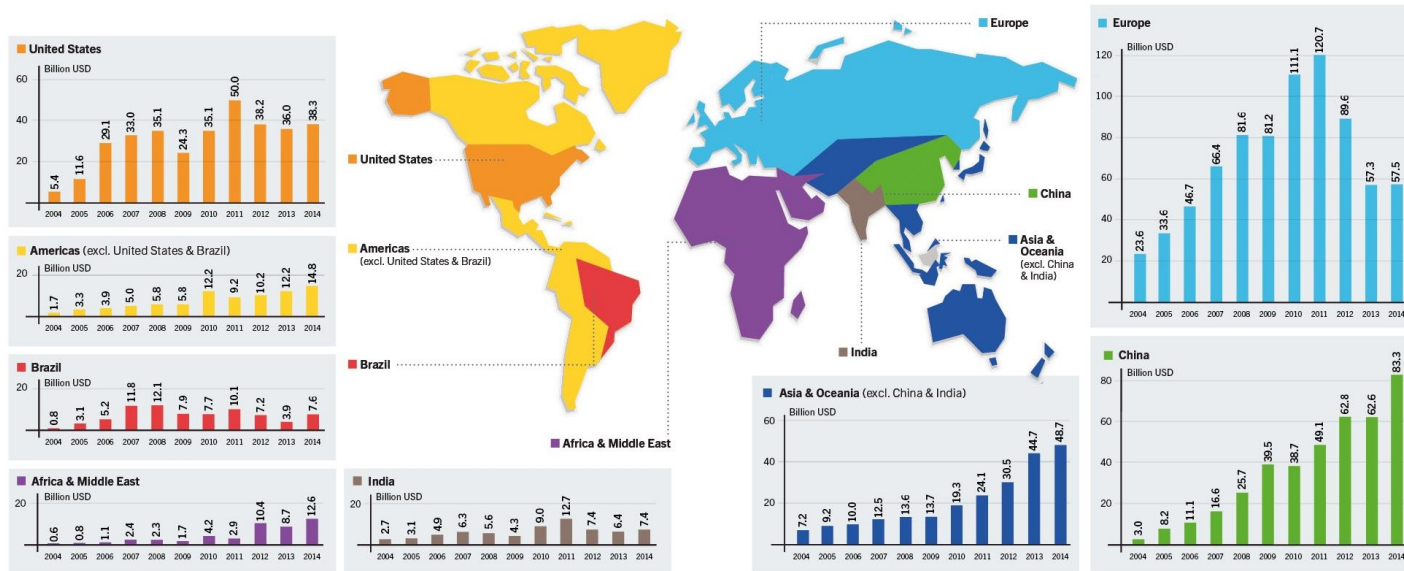


REN21 *Renewables 2015 Global Status Report*

Source: Frankfurt School–UNEP and BNEF



Global New Investment in Renewable Power and Fuels, by Region, 2004–2014



Data include government and corporate R&D.

REN21 *Renewables 2015 Global Status Report*



Source: Frankfurt School–UNEP and BNEF

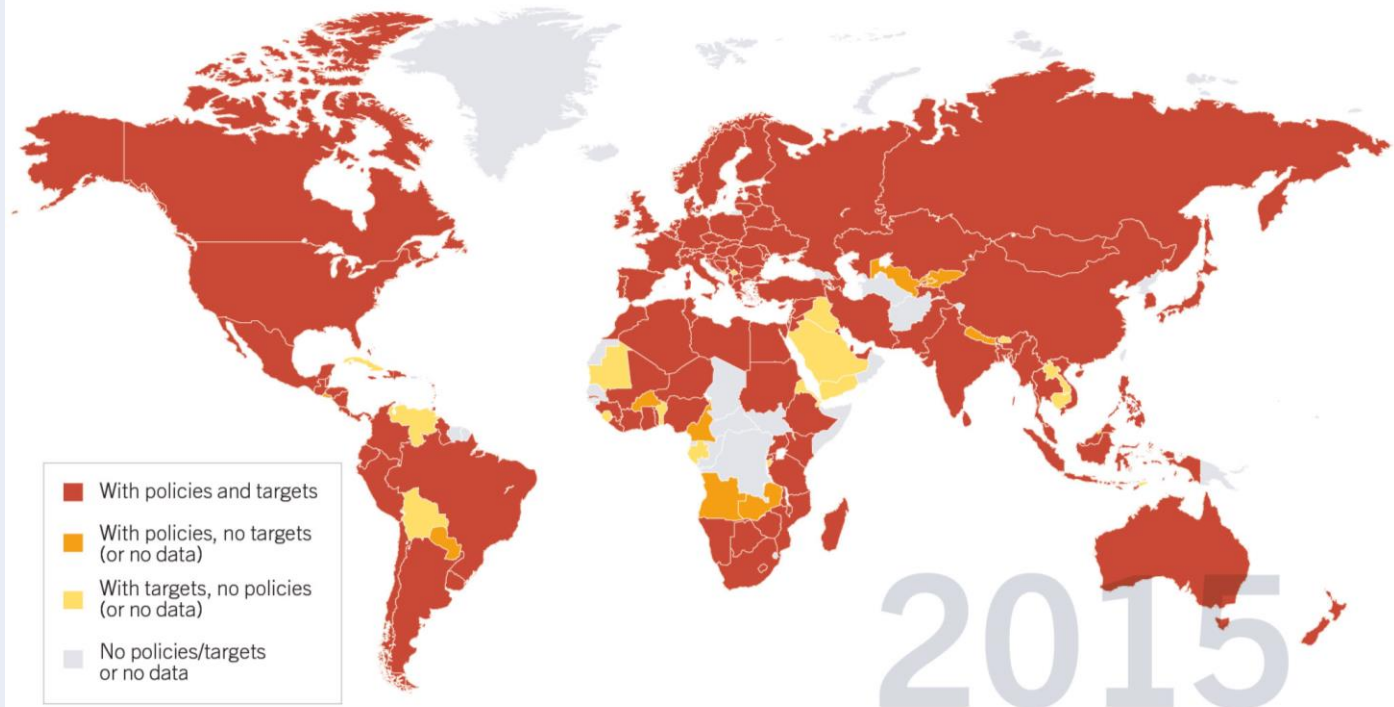
Developed Countries: Annual investment in 2014: **USD 138.9 billion**
(increase of 3 % compared to 2013)

Developing Countries: annual investment in 2014: **USD 131.3 billion**
(increase of 36% compared to 2013)



Renewable Energy Policy Landscape

Countries with Renewable Energy Policies and Targets, Early 2015



Countries are considered to have policies when at least one national or state/provincial-level policy is in place.

REN21 *Renewables 2015 Global Status Report*



Renewable Energy Policy Landscape

		START 2004 ¹	2013	2014
POLICIES				
Countries with policy targets	#	48	144	164
States/provinces/countries with feed-in policies	#	34	106	108
States/provinces/countries with RPS/quota policies	#	11	99	99
Countries with tendering/ public competitive bidding ⁵	#	n/a	55	60
Countries with heat obligation/mandate	#	n/a	19	21
States/provinces/countries with biofuels mandates ⁶	#	10	63	64

REN21 Renewables 2015 Global Status Report

At least **164 countries** had **renewable energy targets**.

At least **145 countries** had **renewable energy policies** in place.

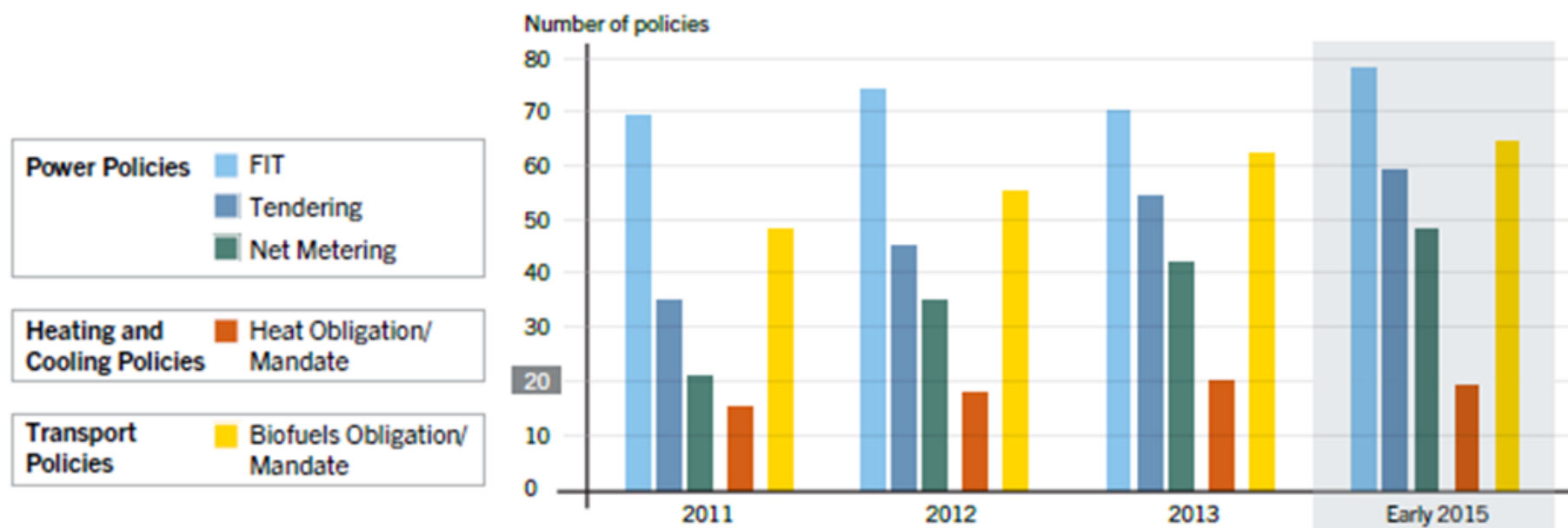
Most policies focus on power: mainly feed-in-tariffs and renewable portfolio standards.

Recent trends: Merging of components from different policy mechanisms.



Renewable Energy Policy Landscape

Number of Renewable Energy Policies, by Type, 2011–Early 2015



Data source: REN21 Renewables 2015 Global Status Report

Power sector: the main focus of policies over the last years

FITs were the most popular type of policy

Net metering or net billing policies were in force in 48 countries as of early 2015, increase of approx. 220% . (2010: 15 countries, 2015: 48 countries)



Distributed Renewable Energy in Developing Countries

15% of the global population still lack any access to an electricity grid.

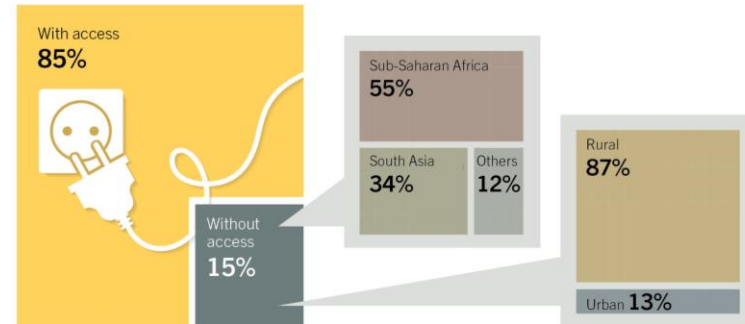
2.9 billion people lack access to cleaner forms of cooking.

Distributed renewable energy systems offer unprecedented opportunity to accelerate the transition to modern energy services in remote areas, as they are **more cost-competitive**.

Little quantitative information on DRE markets, but information available indicates that **markets are significant**, e.g. **off-grid solar PV** attracted approx. **USD 64 billion of investment in 2014**.



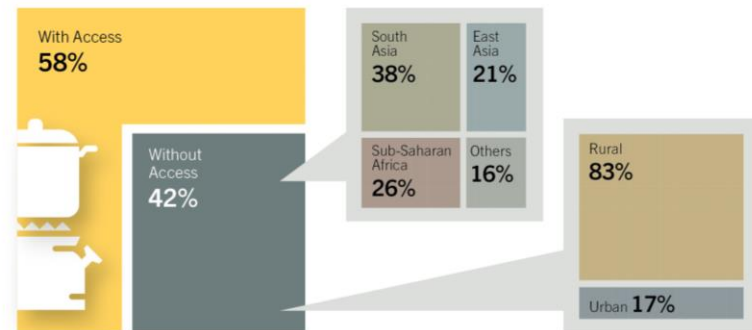
World Electricity Access and Lack of Access by Region, 2012



REN21 Renewables 2015 Global Status Report



World Clean Cooking Access and Lack of Access by Region, 2012



REN21 Renewables 2015 Global Status Report



Distributed Renewable Energy in Developing Countries

Regional differences :

- 23 GW of renewable energy power capacities in Sub-Saharan Africa (excluding South Africa) – less than one third installed in India
- Bangladesh: 3 million SHS operational at the end of May 2014, electrifying 9% of the country's population

Trends:

- Involvement of the private sector
- Increased recognition of the role renewable energy play for energy access
→ Increase in development of off-grid renewable energy programmes and creation of DRE institutions



Conclusions

Renewable energy continued to grow in 2014 against the backdrop of increasing global energy consumption, and a dramatic decline in oil prices (second half of 2014).

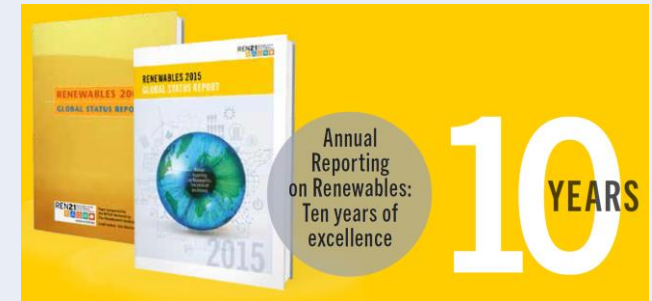
For the first time in 40 years, economic and CO₂ growth has “decoupled” – marking a record year for renewables.

The past decade has set the wheels in motion for a global transition to renewables, but a concerted and sustained effort is needed to achieve it:

- Long-term and stable policy frameworks, which can adapt to changing environment, to sustain and increase investment levels
- Greater attention to the heating and cooling and the transport sector and “energy system thinking”
- Improve information on distributed renewable energy markets in developing countries and improve access to up-front finance



See you at SAIREC 2015
Cape Town, 4-7 October 2015



RENEWABLE ENERGY POLICY NETWORK FOR THE 21st CENTURY



REN21
Renewables Academy

*REN21
Renewables Academy*

*Global Status Report:
yearly publication
since 2005*

Regional Reports

Global Futures Report

www.ren21.net/map



*South Africa International
Renewable Energy
Conference
4-7 October 2015*

www.ren21.net/gsr

Subscribe to our newsletter
www.ren21.net

