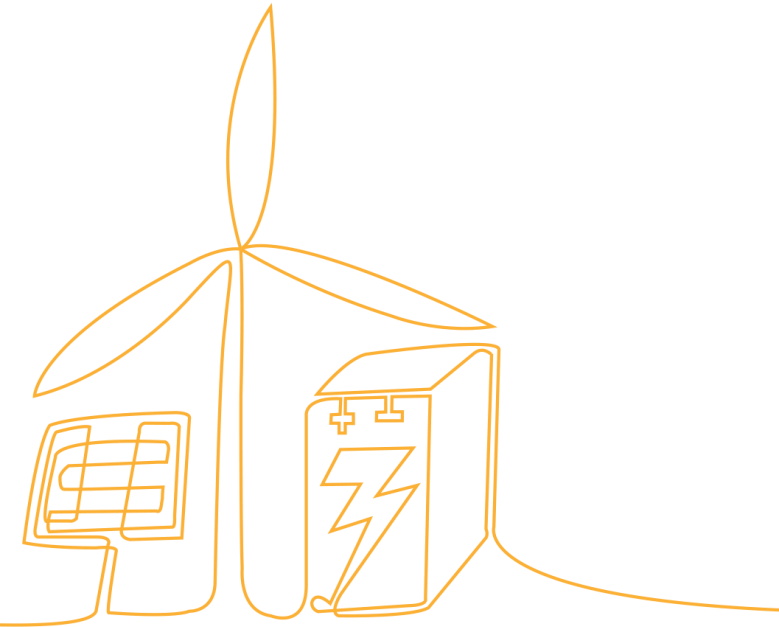


DELTA-EE



EUROPEAN BATTERY MARKET OVERVIEW

ENERGY STORAGE RESEARCH SERVICE

Robin Adey-Johnson – robin.adey-johnson@delta-ee.com

Introduction



About Delta-EE

Delta-EE enables organisations to develop the best **strategies**, **business models** and **customer propositions** for the energy transition.

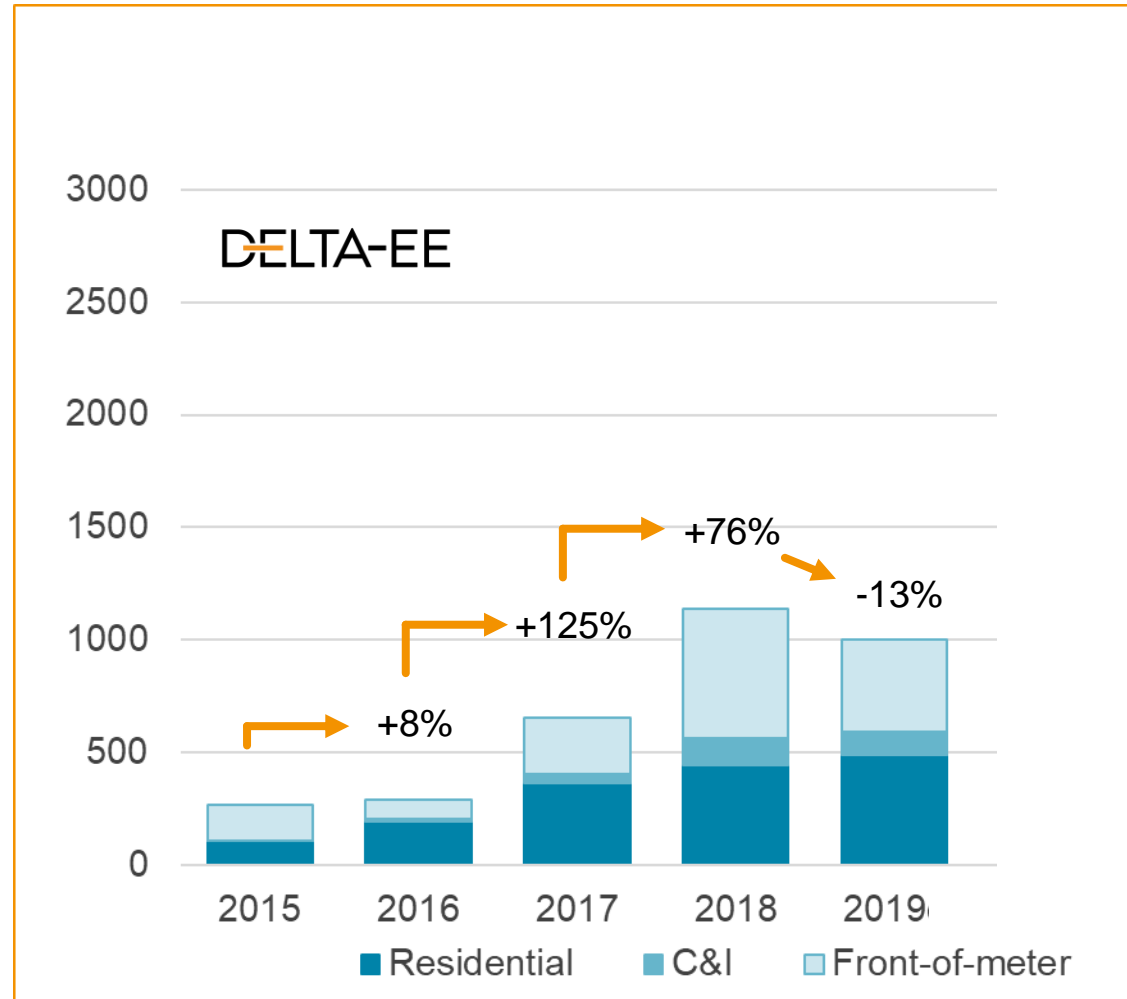
We provide **bespoke consulting** and **subscription research** with broad coverage and deep expertise in new energy.

Presentation overview

- How much energy storage is installed in Europe today?
- Which residential markets see the most success, and why?
- How will this change in the future?
- How has Covid-19 impacted European storage markets?

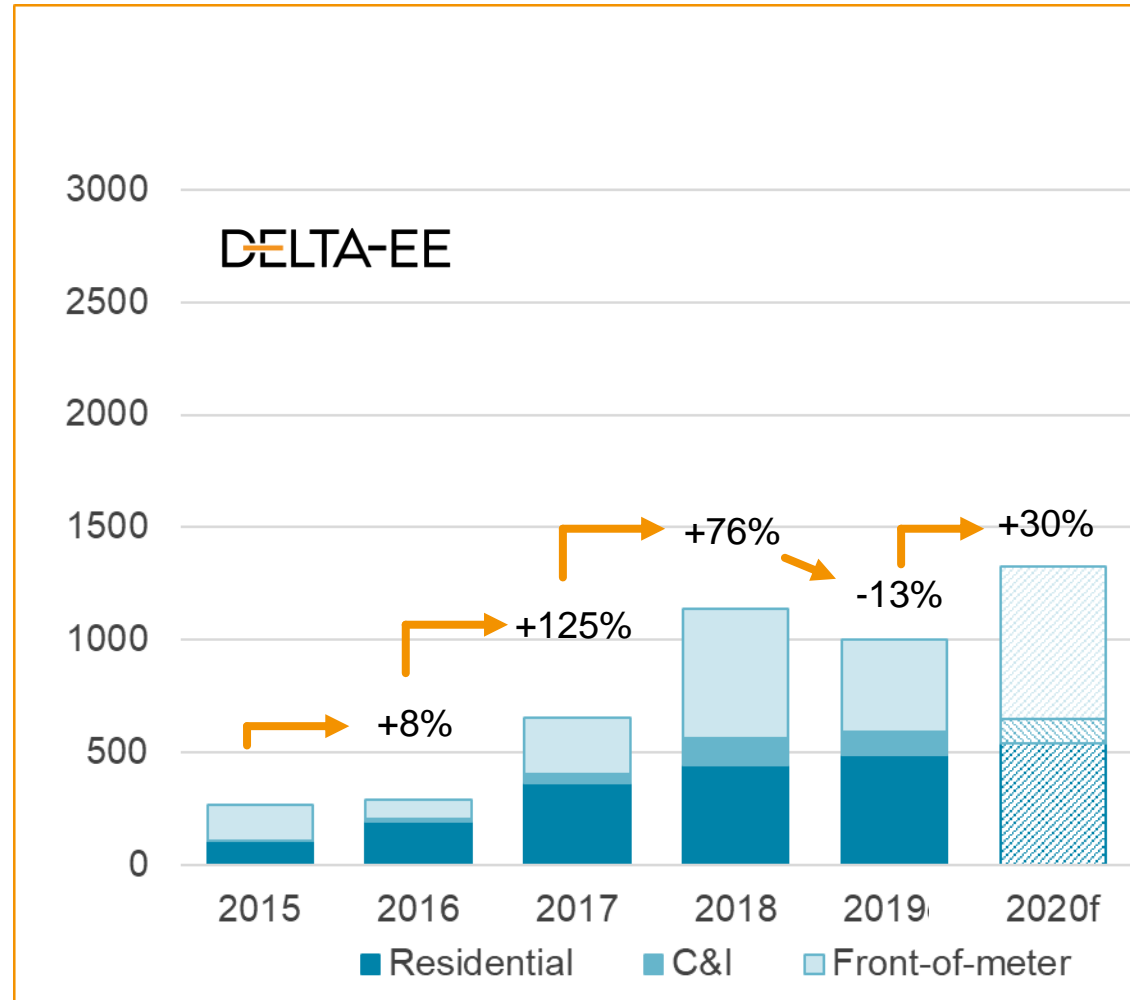
Overall picture

Annual European energy storage installations (MWh)



Overall picture

Annual European energy storage installations (MWh)



3 key drivers for residential energy storage markets



FiTs falling in value



Emergence of innovative business models



Subsidies continue to be a key driver

3 key challenges for residential energy storage markets



CAPEX



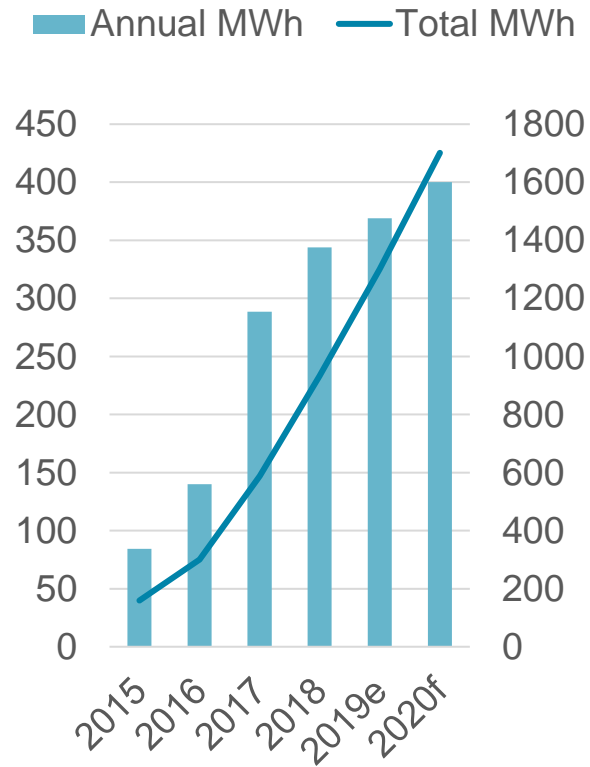
Visibility of price signals



Competition of other technologies

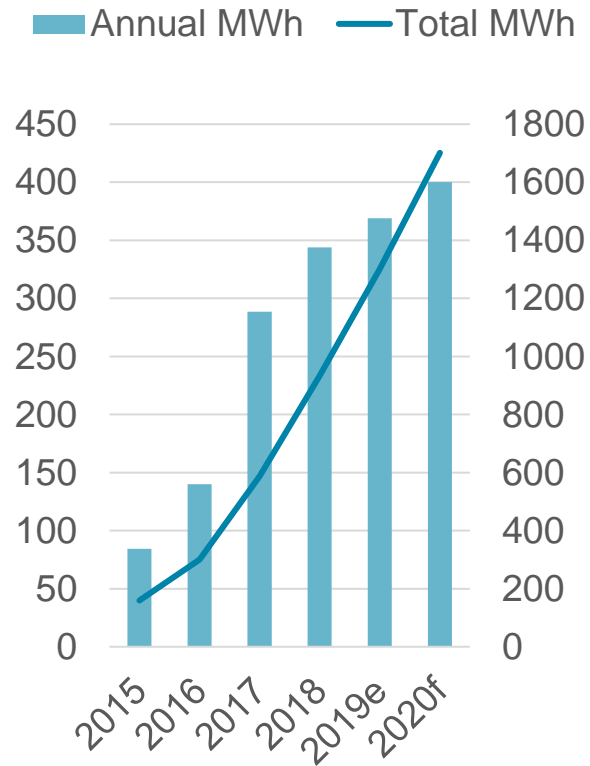
Key markets – now

Germany

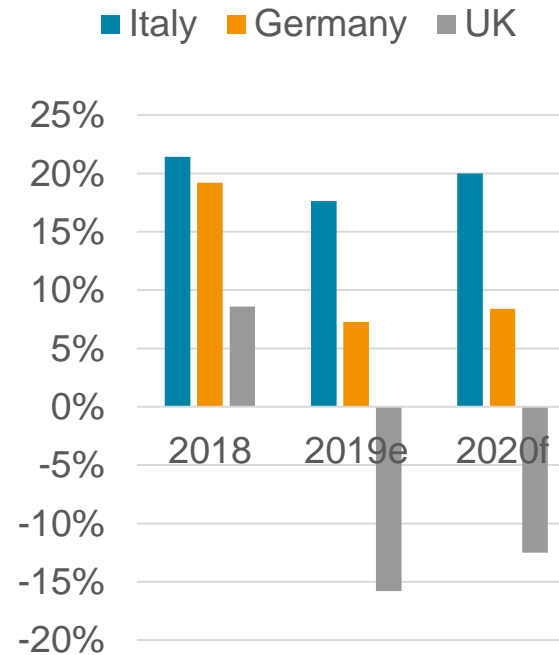


Key markets – now

Germany

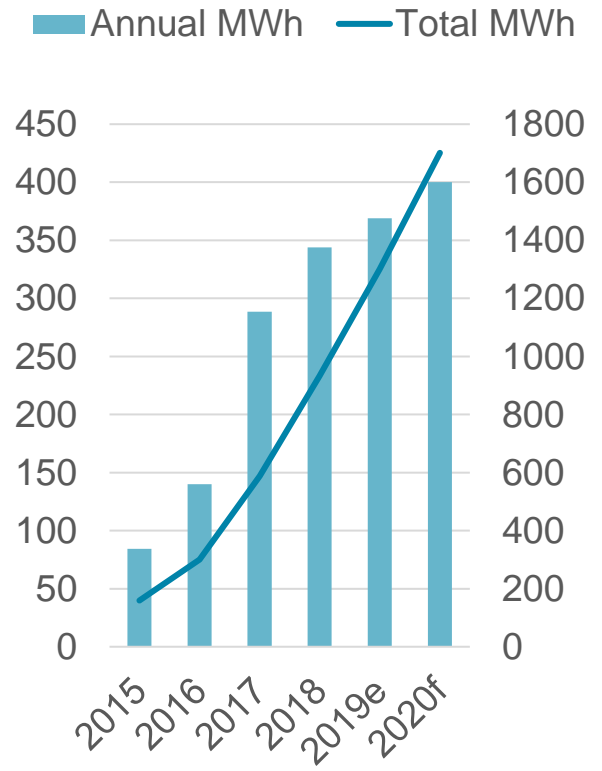


% change year-on-year

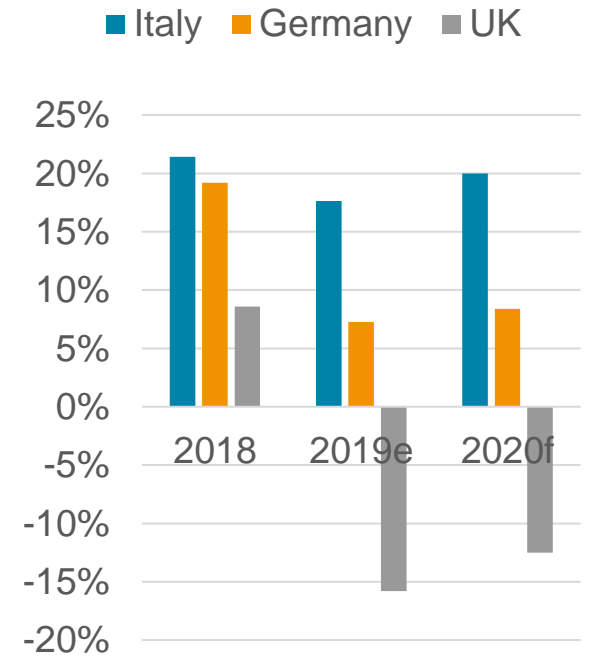


Key markets – now

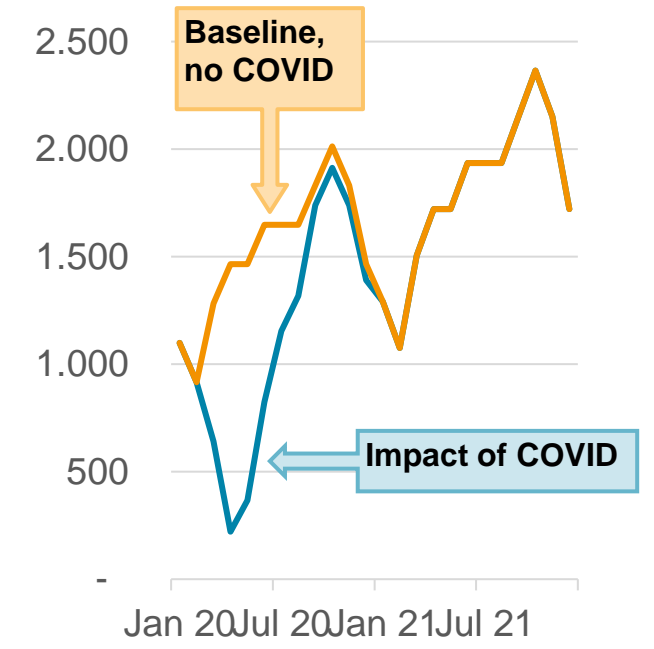
Germany



% change year-on-year



Impact of COVID



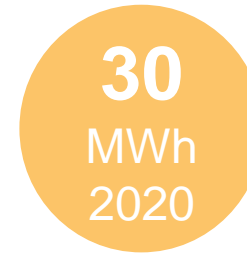
Key markets – future

Iberia



- Removal of 'sun-tax'
- Time-of-Use pricing
- Ancillary service markets opening

Central/Eastern Europe



- Wide variety of markets at different stages
- Clean Energy Package

About Delta-EE

Delta-EE enables organisations to develop the best strategies, business models and customer propositions for the energy transition.

'New Energy' Business Models

Identify and understand the alternative and new business models for the energy transition



EVs & Electricity

Understand the opportunities and challenges from sector coupling between electricity and transport



Flexibility & Energy Storage

Take advantage of the opportunities emerging from an active demand side



Heat

How channel disruption, sector coupling and new technologies are changing the heat sector



Distributed Power

Global market insight & expertise into the growing role of decentralised generation



Digital Energy

Opportunities in the connected home market and how digitalisation is changing the energy customer relationship

Delta-EE provides...

Subscription Research Services

Consultancy

... to support people doing these jobs:



Innovation & Planning

Identify & make choices



Business Development

Design, develop and pilot new business models



Commercialisation

Implement & launch



Product Management

Grow & evolve