OUTLOOK:
POWER MARKET REVENUES OF RENEWABLES

Tobias Kurth
Die Finanzierung der Energiewende in Deutschland und Frankreich

Berlin
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ENERGY BRAINPOOL

In cooperation with our customers our experts develop solutions for the Energy Market 3D.

Who are we?
- Independent and neutral
- 20 team members
- 2 managing directors
- Founded in 2003

What are the issues?
- Risks are increasing
- Transformation of energy markets
- Structure of prices fundamentally different
- New business case are unclear

What are the next steps?
- Transformation of heat and mobility sector
- Demand for new capacity
- Investment and financing
- Variety of opportunities

How can we support you?
- Training and simulations
- Analyses and scenarios
- Individual consulting
- Workshops
- Studies

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OFFER AND DEMAND CURVES

Delivery hour 15 on 28.05.2018: (hour 15, MCP: 47.35 EUR/MWh, MCV: 33758.8 MW)
THE MARKET PRICE IS DETERMINED BY SUPPLY AND DEMAND VIA THE MERIT-ORDER

Market price

Marginal costs and electricity price

Installed capacity

Electricity demand

Must run & RE (without subsidies*)

Nuclear PP

Lignite PP new

Hard coal PP,new

Lignite PP old

Hard coal PP,old

*) without costs for primary energy carriers
FUTURE INSTALLED CAPACITIES

Germany

France

Gross generating capacities and annual peak load in GW

- Nuclear
- Lignite
- Hard Coal
- Oil
- Other RES
- Reservoir
- Pump storage
- Run of river
- Wind total
- Solar

Annual peak load

Gross generating capacities and annual peak load in GW

- Nuclear
- Lignite
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Annual peak load
Outlook: Power market revenues of renewables

FUTURE GENERATION MIX

Germany

France

Gross electricity production and demand in TWh

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DEVELOPMENT OF POWER PRICES

Germany

France

+ 32 %

- 26 %

+ 22 %

- 27 %
DEVELOPMENT OF SALES VALUES PV

Germany

Sales volumes in % of annual generation

Sales values in EUR\textsubscript{2016}/MWh

France

Sales volumes in % of annual generation

Sales values in EUR\textsubscript{2016}/MWh

historical
DEVELOPMENT OF SALES VALUES ONSHORE

**Germany**

- Historical sales volumes in % of annual generation.
- Sales values onshore (left axis).
- Sales volumes onshore (right axis).

**France**

- Historical sales volumes in % of annual generation.
- Sales values onshore (left axis).
- Sales volumes onshore (right axis).
DEVELOPMENT OF SALES VALUES OFFSHORE

**Germany**

- Sales values in EUR/MWh
- Sales volumes in % of annual generation

**France**

- Sales values in EUR/MWh
- Sales volumes in % of annual generation

**Graph Details**
- Sales values offshore (left axis)
- Sales volumes offshore (right axis)