Capra Renewables

CapraNews

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The Renewables Market and Information Network
Advertisements, Market Data, News, and Networking

22 September 2025

Dear Readers, we take a look at wind/solar output curtailment as Europe expands its RES capacity.

Country	2024 Curtailment (% of total renewable production)
Germany	Solar: ~3%; Wind: <2%
France	~2.5%
Spain	<2%
Italy	<2%
Greece	3.50%
UK	Wind: 10%

In 2024, curtailment rates varied sharply across Europe. Germany's solar curtailment reached nearly 3% of total production, almost doubling from the previous year as solar capacity increased by c20% over the period. Wind curtailment in Germany remained below 2%. France curtailed approximately 2.5% of its renewable output. Spain and Italy maintained curtailment below 2%, benefiting from more balanced geographic distribution of RES production relative to load / grid layout for the time being. Whilst Greece had only slightly higher curtailment in 2024 at 3.5%, levels peaked in March 2025 at c25% of renewable generation reflecting grid limitations amid rapid renewable expansion. In the United Kingdom, wind curtailment averaged 10% nationwide, with Scottish wind farms at 13% although H1 2025 saw this rise very significantly to over 30% due to transmission bottlenecks and limited local demand.

Curtailment or the forced output reduction against market or contractual signals, reflects the success of renewable deployment which has not been matched by grid, storage-/flexible generation capacity as well as load within and across pricing zones. Remote generation cannot always reach demand centres, storage capacity remains limited, and market incentives often fail to encourage flexible consumption. Solutions include strengthening transmission networks and interconnectors, deploying flexible generation and storage, and using demand-side response to shift consumption to periods of high renewable output. Smarter market mechanisms, including locational and dynamic pricing, can further improve

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efficiency, provide incentives to align RES generation with demand geographically and in time. However, windy and sunny places don't necessarily align with consumption centres, and if generation capacity has to be built out of sight, then the only solution is to invest in grid and storage assets.

Europe's experience shows that with planning and infrastructure investment, curtailment can be managed at relatively low levels. The UK's high ramp-down rates highlight the grid and flexibility investment necessary to accommodate a system with more than 60% of onshore wind capacity in Scotland and 85% of electricity demand south of the border. High redispatch costs of £1.2bn (4.40 GPB/MWh spread across total UK demand) justify considerable investment in expanding grid capacity, BESS as well as locational and demand-side management. For context, it remains to mention that UK RES investments easily reduced power prices by more than those (temporary) 4.4 GBP/MWh grid management costs compared to the old fossil system.

New Capra Members

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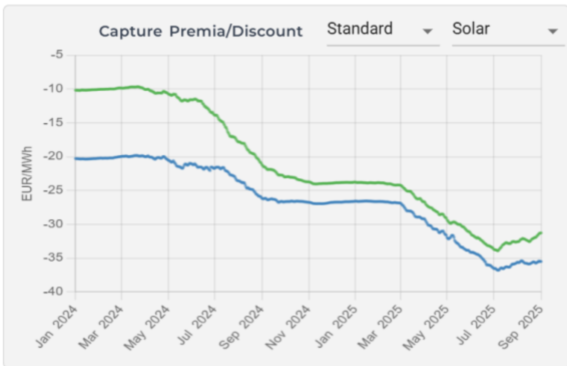
Market View



Discounts for Solar Capture Prices in Poland relative to base load have widened significantly across 2024 and 2025 and at a greater rate than seen in Germany, closing the gap between the 2 countries. However, solar CP in Poland still trade at comfortable 65EUR/MWh (current MA 360) which represents a premium of around 20EUR/MWh over Germany, explained by overall higher power prices. Residual demand (load less RES) is at 5-15GW in Poland during summer, not dissimilar to Germany. However Polish summer peak load is only a 1/3rd of German levels.

Members of Capra have full access to standard and balanced (forecasting errors taken through imbalance markets) capture prices for a range of European countries. Visit www.caprarenewables.com/price-and-market-information for additional information about Capra's RES market performance data.

Snapshot on New Advertisements on Capra Renewables

Type of Transaction	Sell-Side Buy-Side	Energy or Resource	Place of Transaction	Min – Max	Technology of Asset	Status of Asset	Location of Asset
Asset	Offer Asset for Lease	Asset – Land	United Kingdom	120 – 120 HA	Solar – PV – Agrivoltaic, BESS	Development – Early	United Kingdom
Development Services	Request Services	Service	United Kingdom	120 – 120 HA	Solar – PV – Agrivoltaic, BESS	Development – Early	United Kingdom
Funding – Debt	Request Debt Funding	Asset – (Shares in) Company; SPV	Belgium	– 35 m EUR	Other	Ready to Build	Belgium
Funding – Share Capital	Sell (Shares; Land; Equipment)	Asset – (Shares in) Company; SPV	Belgium	– 10 m EUR	Other	Ready to Build	Belgium

Full details and contacts behind advertisements are available to members of [Capra Renewables](). Capra Renewables does not charge introducer or success fees.

Selection of Newsfeeds

Cepsa's Moeve Launches €3 Billion Green Hydrogen Valley in Andalusia with 2 GW Electrolysis Target

Moeve, a subsidiary of Spanish energy company Cepsa, has launched a €3 billion project to develop the Andalusian Green Hydrogen Valley, aiming for 2 GW of electrolysis capacity by 2030 across sites in Huelva and San Roque. The initiative targets annual production of 300,000 tonnes of green hydrogen. Supported by EU funds

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21 September 2025

ENERCON to Deliver 13 Turbines to Alterric for Kutenholz Wind Farm

ENERCON has signed a contract with Alterric to supply 13 E-175 EP5 E2 onshore wind turbines, each with a capacity of 6 MW, for the Kutenholz wind farm in northern Germany. Installation is expected to begin in spring 2026, with commissioning scheduled for the fourth quarter of the same year. The

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Velto Renewables to Acquire 260 MW Solar Projects in Spain from Bankinter and Plenium Partners

Velto Renewables, supported by La Caisse, is set to acquire a 260 MW portfolio of regulated solar projects in Spain from Helia II FCR, a fund managed by Bankinter Investment and Plenium Partners, with Plenium also contributing additional capacity. The portfolio includes 53 operational plants spread across Spain, generating around 360 GWh

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PGGM Invests €19 Million in Sympower to Scale European Flexibility

Dutch pension investor PGGM has invested €19 million in Sympower to expand its European energy flexibility business. The funds, part of an extended €42 million Series B1 round, will accelerate Sympower's rollout of battery storage optimisation services and support mergers and acquisitions. Sympower manages over 2.7 GW of flexible assets

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Enercon and NextWind Form LOI on German Wind Projects

Enercon and NextWind have signed a Letter of Intent at the Husum Wind trade fair to develop onshore wind farms in Germany. NextWind plans to build more than 100 turbines from its advanced pipeline in collaboration with Enercon, focusing on upgrading existing sites.

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AIIB and TSKB Finance 100 MW Solar Project in Türkiye

The Asian Infrastructure Investment Bank (AIIB) and the Industrial Development Bank of Türkiye (TSKB) will finance a new 100 MW solar PV plant in Turkey.

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