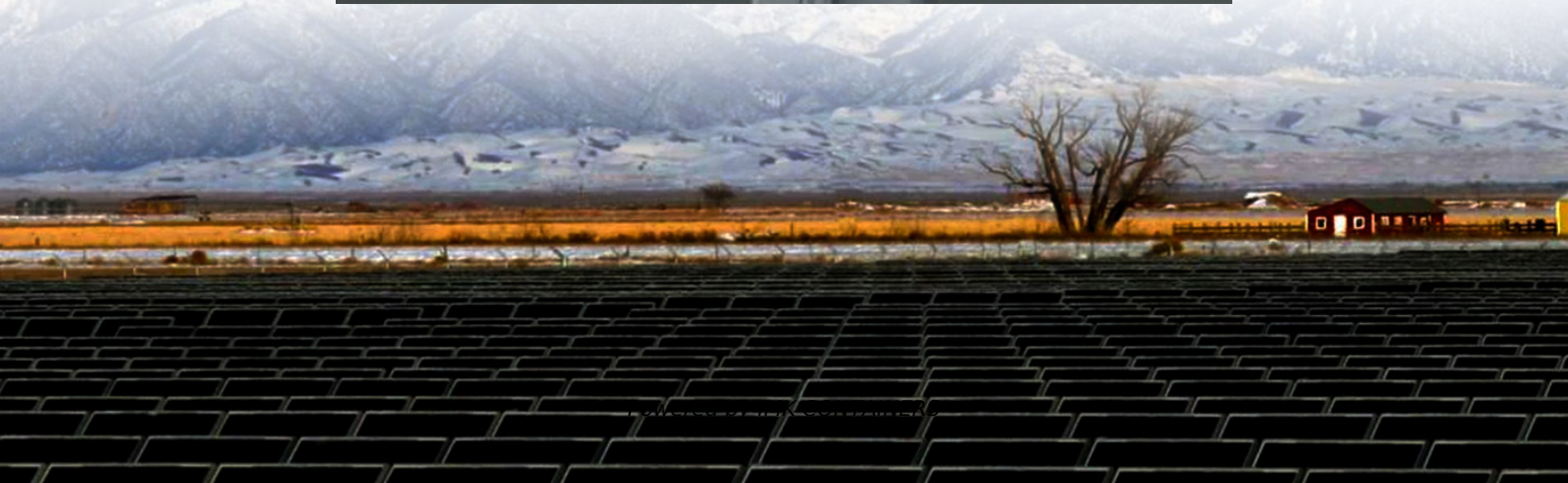
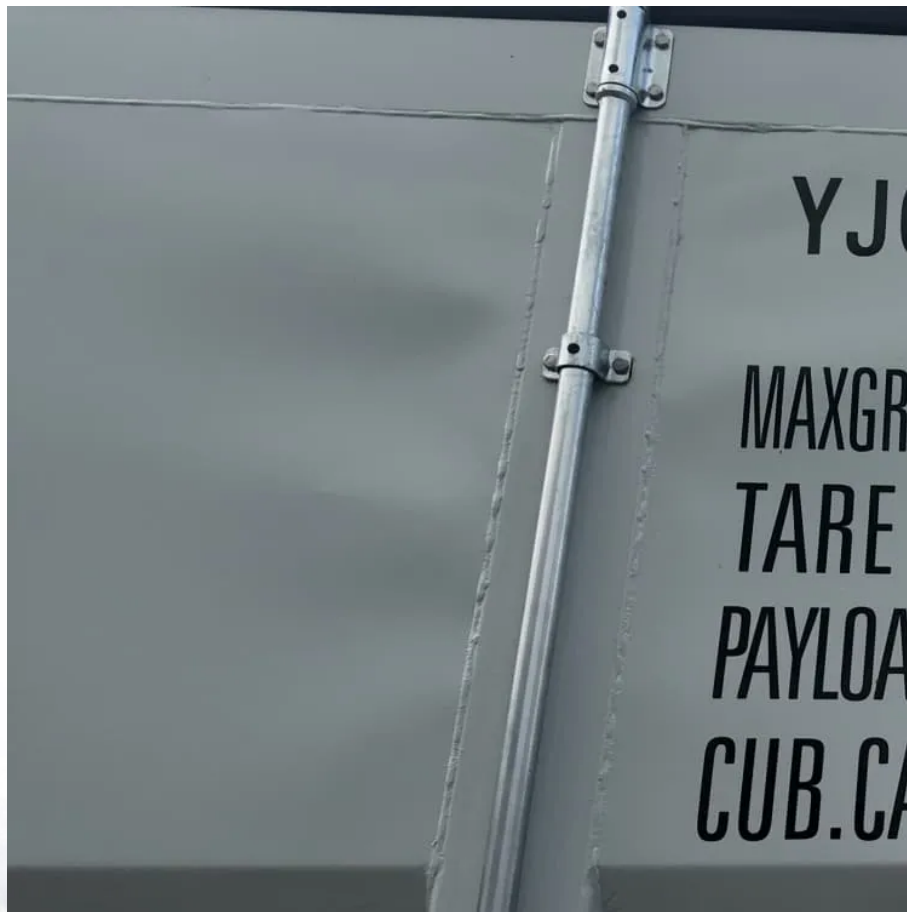


What happened to solar energy in China's solar energy storage cabinets





Overview

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.

Why are solar & energy storage costs rising in Q4 2025?

Equipment procurement costs for solar and energy storage will jump around 9% starting in Q4 2025, marking the end of the bargain pricing developers have enjoyed for the last 18 months. That's because China is changing the rules. Wood Mackenzie points to three major drivers behind the coming spike: Polysilicon consolidation.

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 China's policy change affect solar projects in Q4?

That policy shift means developers worldwide will face higher costs. In the US, storage and solar projects relying on Chinese equipment will likely see about a 9% cost increase in Q4. Analysts expect inverters to lose their export rebate soon, too, adding more upward pressure.



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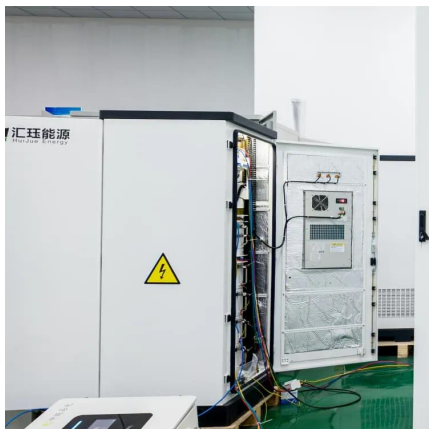




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