EUROPE'S ENERGY STORAGE HITS 100 GW

EMMES 9.5

EUROPEAN MARKET MONITOR ON ENERGY STORAGE

About LCP Delta

LCP Delta™ is a trading name of Delta Energy & Environment Limited and Lane Clark & Peacock LLP. LCP Delta™ combines the expertise of LCP Energy and Delta-EE to provide a single partner across the whole energy value chain. We are a team of passionate people using data, primary research, insights, analysis and models embracing advanced technology and innovation to accelerate the energy transition globally.

About Energy Storage Europe Association

The Energy Storage Europe Association, based in Brussels, is a leading member-supported organisation representing more than 70 entities across the entire energy storage value chain. Founded in 2011, it includes utilities, technology providers, optimisers, research institutes, and system operators. The Association promotes energy storage deployment to enable a resilient, climate-neutral energy system.

More about this report here:

99.3 GW Installed Currently Across Different Technologies

As of 1 Nov 2025

Cumulative installed capacity by technology

Pumped Hydro Storage — 53.6 GW

Electrochemical Storage — 44.8 GW

FoM — 17 GW

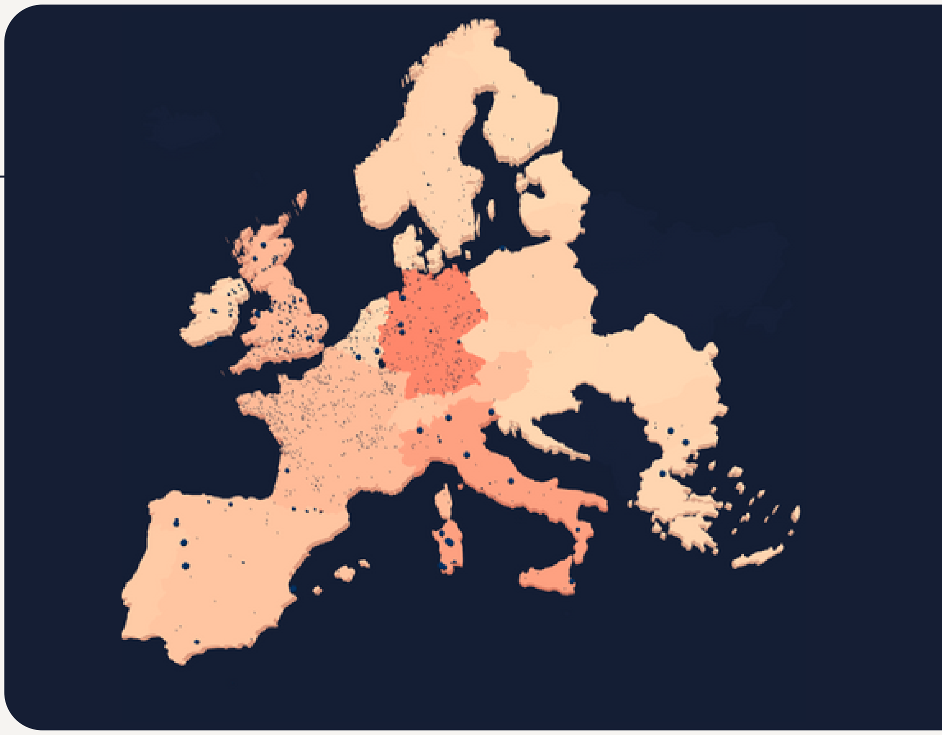
BtM — 27.8 GW

Large-scale Thermal — 0.55 GW

Other — 0.35 GW

At current rate, storage will surpass 100GW in Dec 2025

European map
of power capacity



Source : LCP Delta's STOREtrack

Key numbers for BESS deployment so far

As of 1 Nov 2025

	New installations	2024-2025 Change
FoM storage capacity	4.1 GW 11 GWh	Already reached 2024 levels (4.1 GW)
BtM storage capacity	7.3 GW 10.6 GWh	Already higher than 2024 (7.1GW)
Total Power capacity	11.4 GW 21.9 GWh	

Additional 128GW/300GWh of electrochemical storage added to European grids by 2030

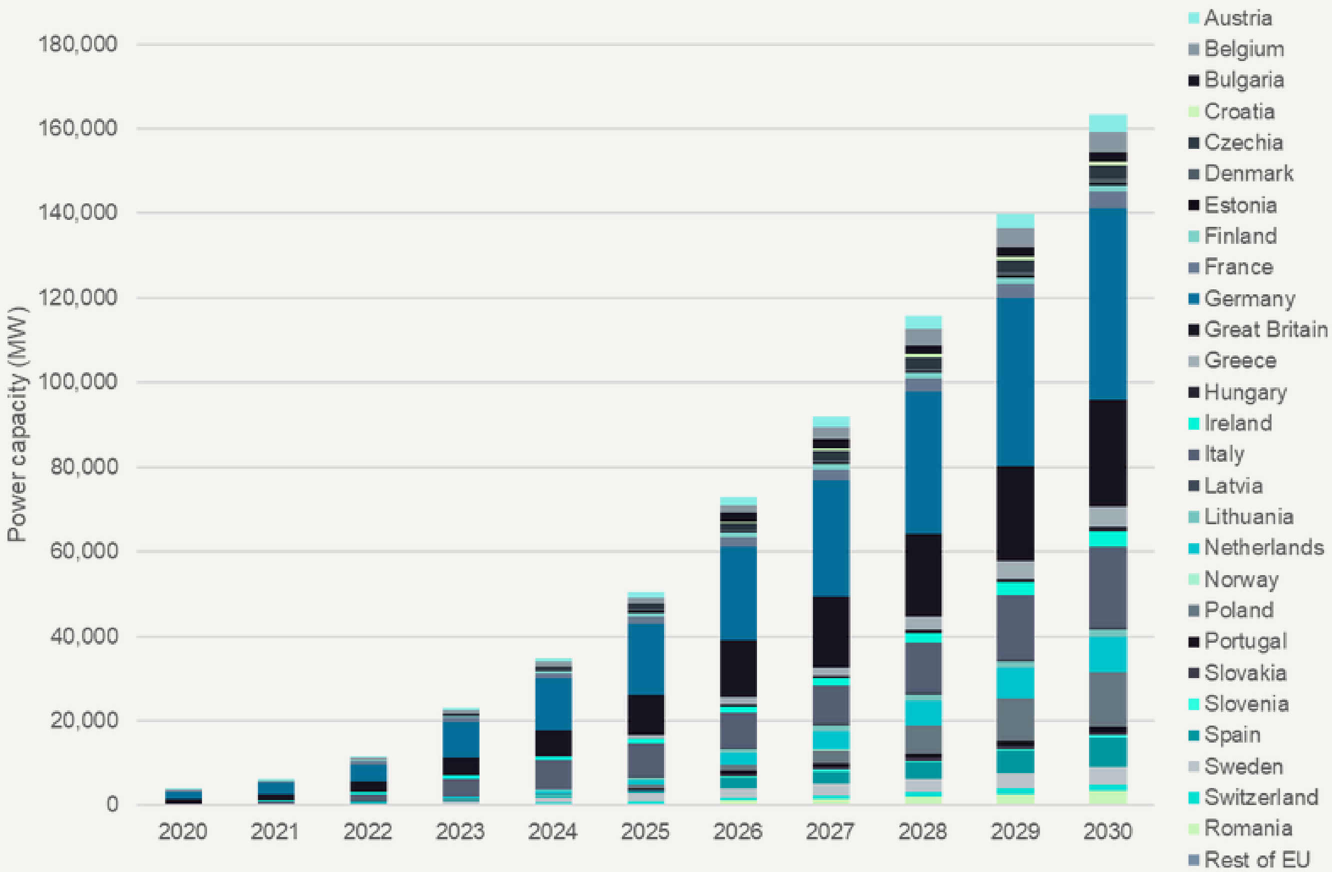
35 GW

2024 cumulative installed capacity

163 GW

2030 cumulative installed capacity

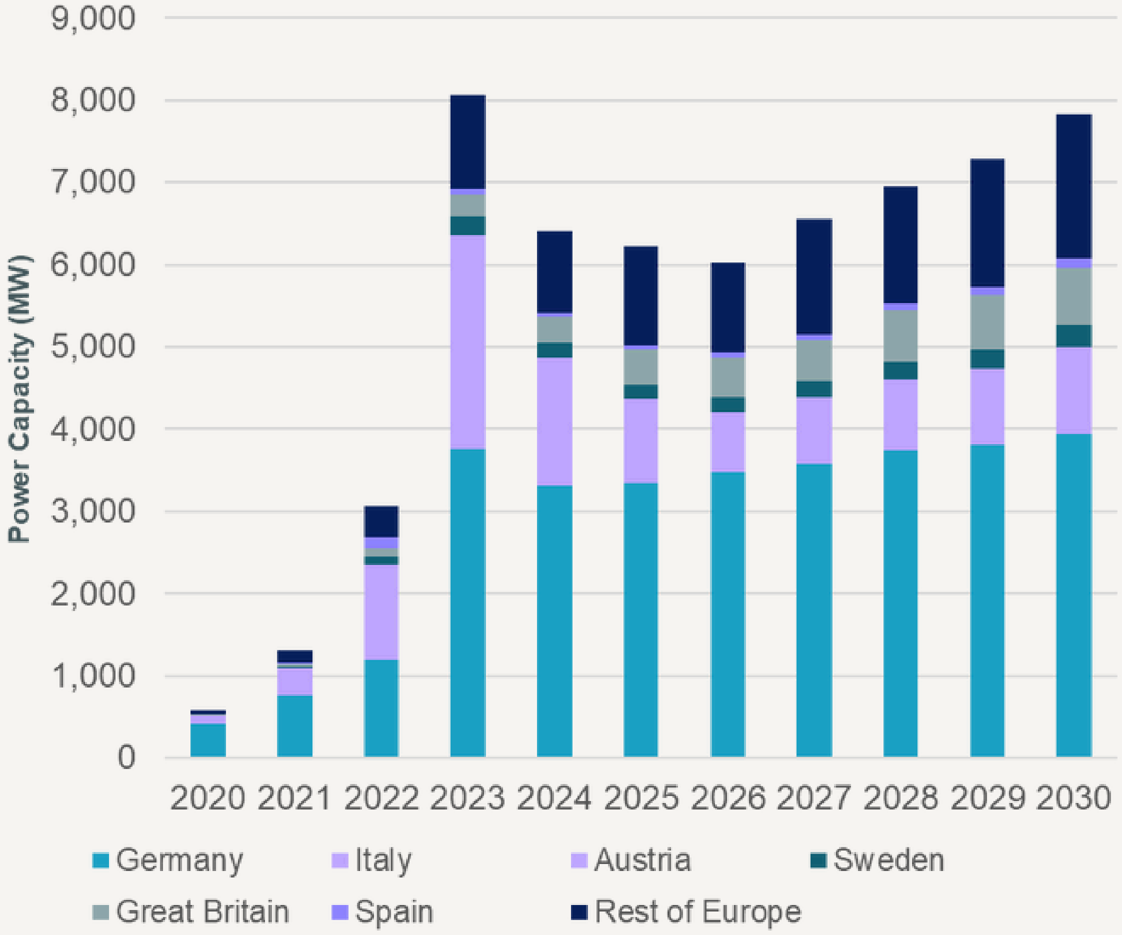
Cumulative power capacity



Behind-the-meter storage: market trends and analysis

Residential European market forecast

Residential storage market forecast: Annual capacity (MW)



Focus countries

Reduced in Europe's top market deployments – Italy and Germany

Removal / reduction of important subsidies in key markets

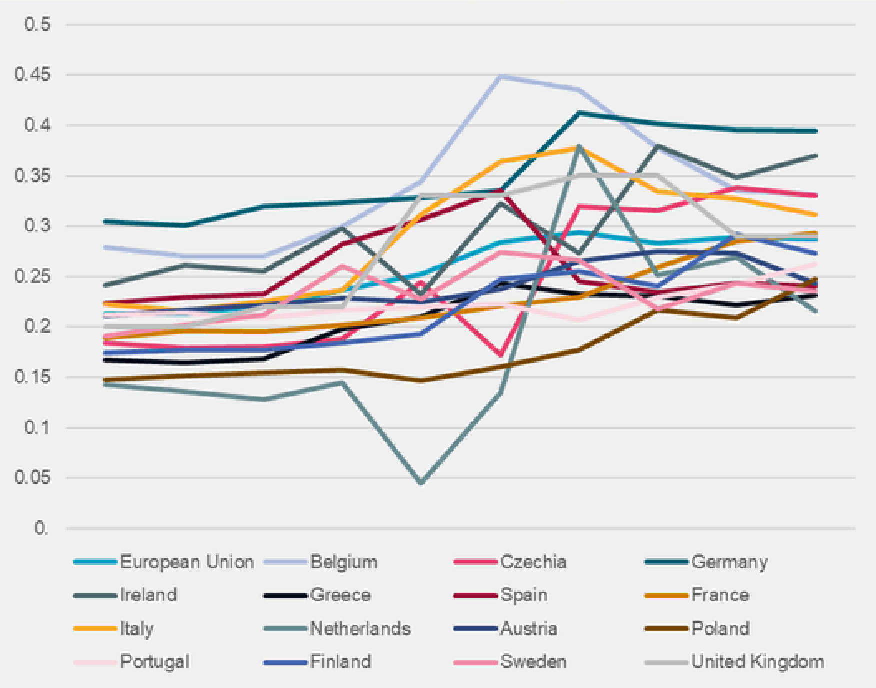
PV market developments affecting long-term deployment

Dynamic tariffs and changing remuneration for solar PV will provide more incentives in the future

Higher borrowing costs and cost-of-living pressures subdued demand in 2024

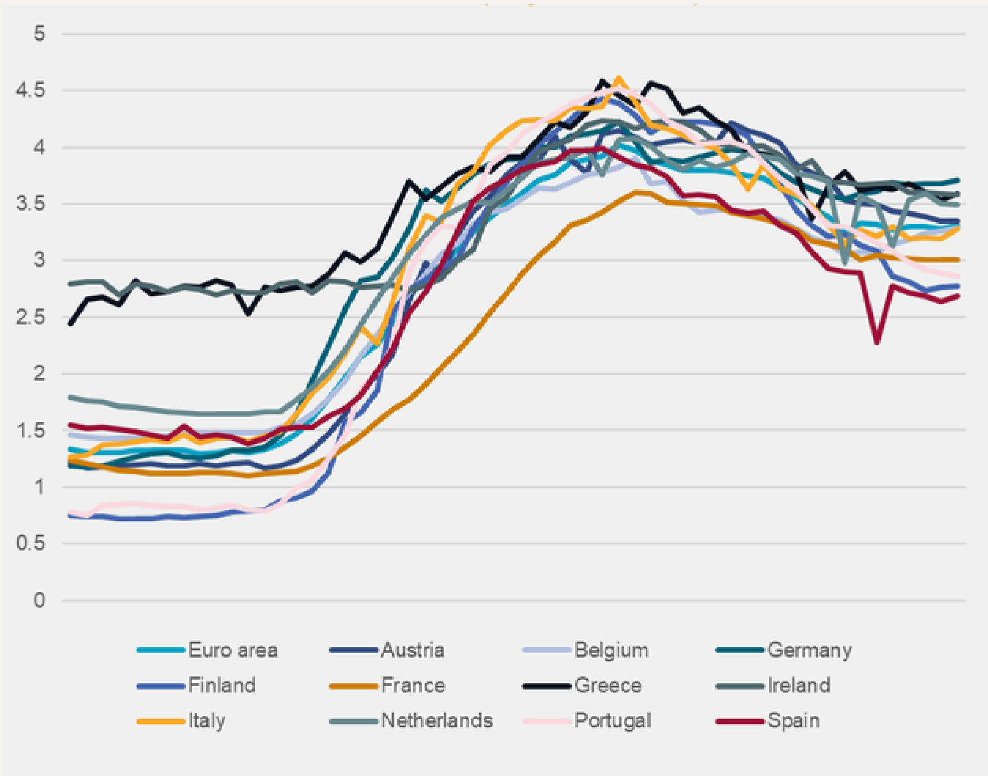
However, electricity price uncertainty will be a driver of the market out to 2030

Evolution of Electricity Prices for Residential customers (€/kWh)



Electricity prices for household consumers inc .taxes and levies
Source: Bi-annual data from Eurostat, OFGEM

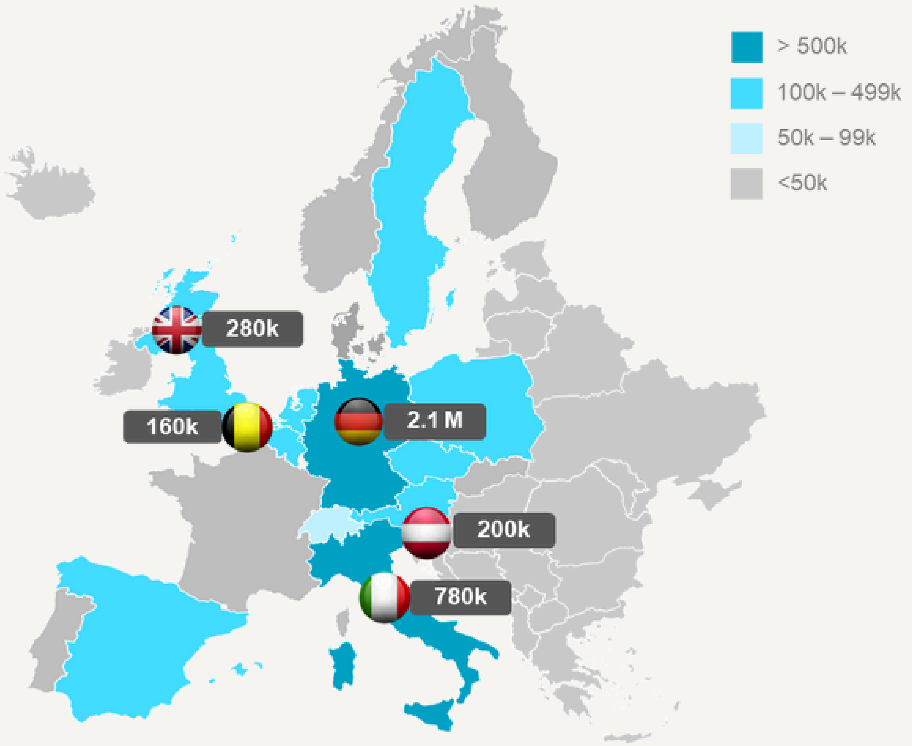
Composite cost of borrowing indicator for households (% per annum)



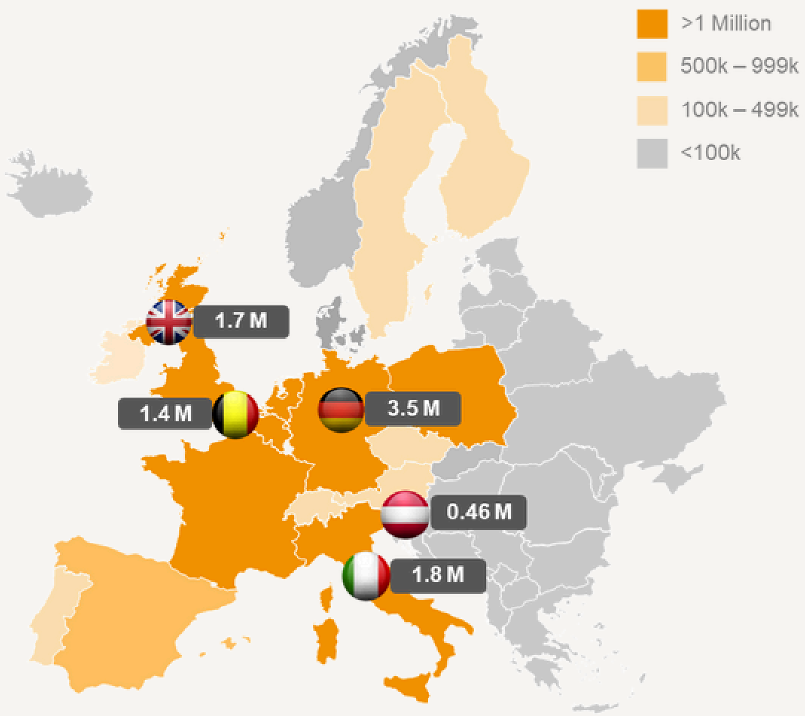
Source: European Central Bank

Europe has >18 million solar homes and 4 million battery homes

Residential battery installed base
Number of systems (1 Nov 2025)

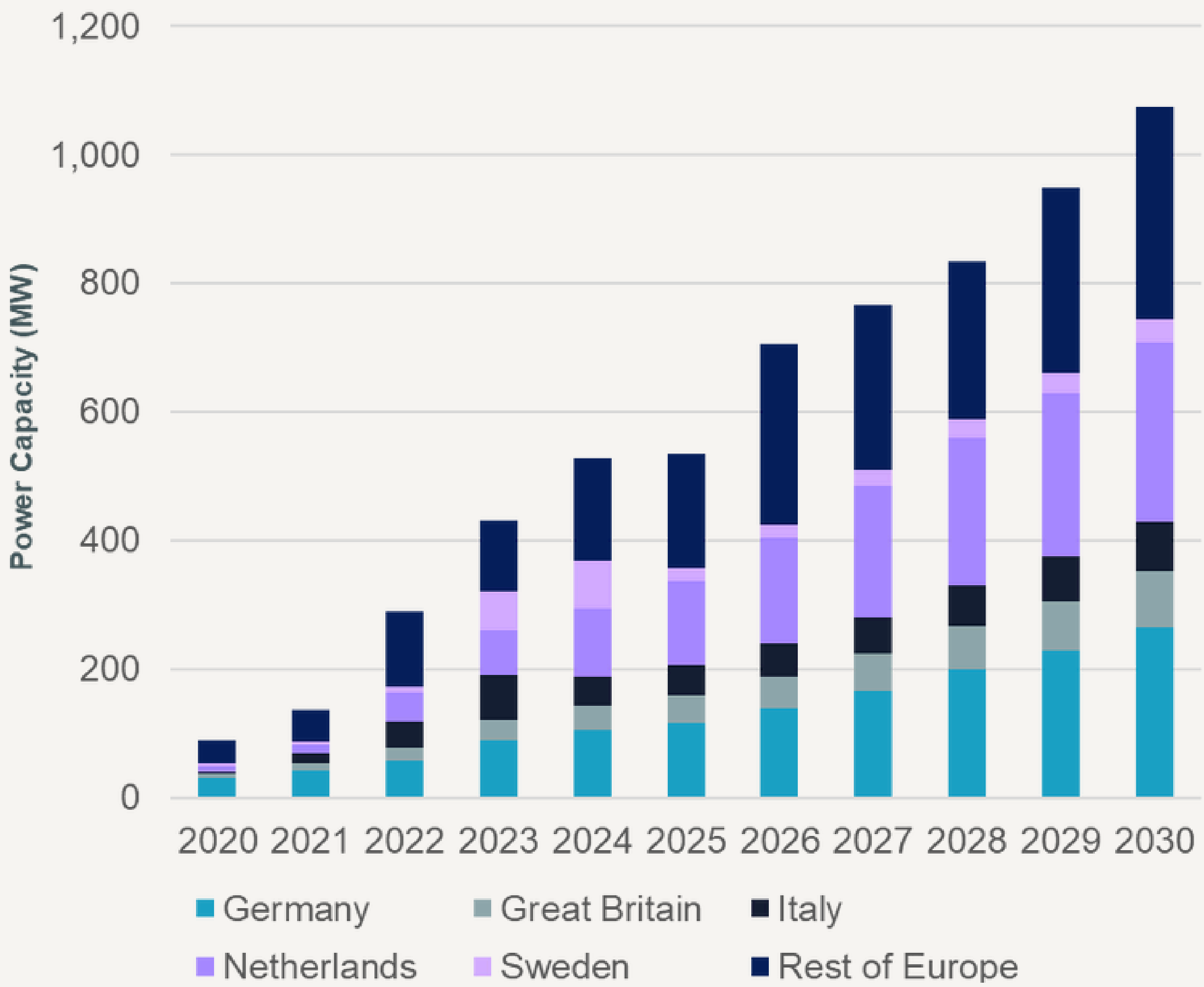


Residential solar PV installed base
Number of systems (1 Nov 2025)



C&I European market forecast

C&I storage market forecast: Annual capacity (MW)



Focus countries

Electrification driving unique use-cases and a need for storage

Accessibility to flexibility revenues

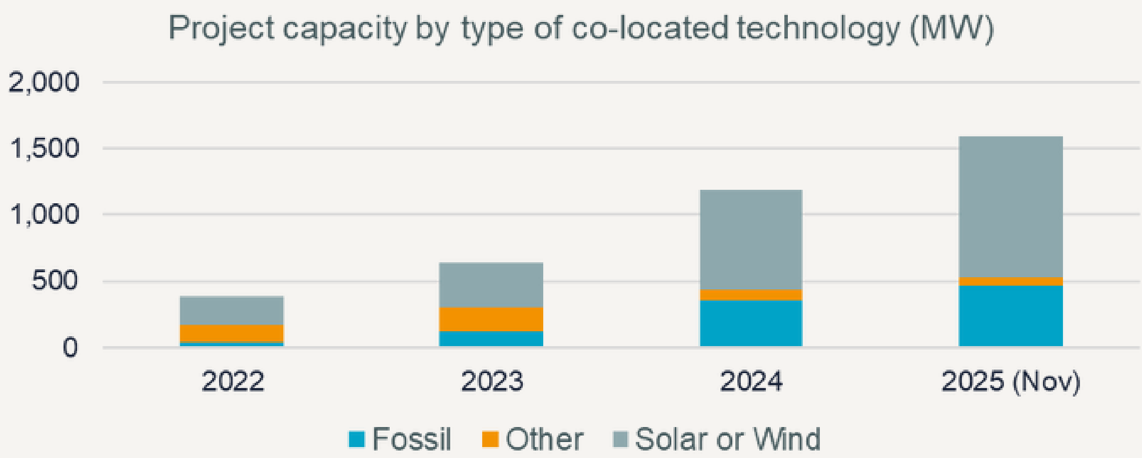
Slower PV deployment impacted growth rates, especially in smaller systems

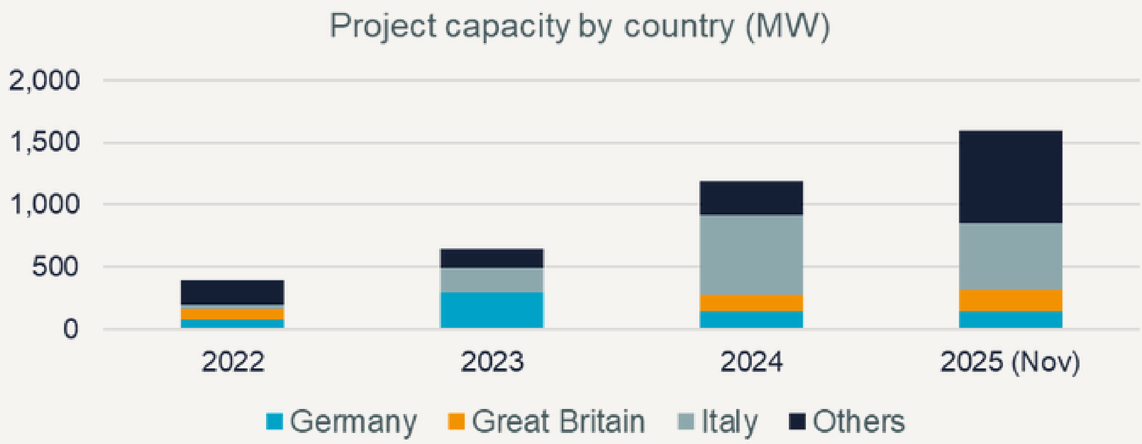
Improved outlook for the majority of the market drivers by 2030

Front-of-the-meter storage: market trends

Co-location of storage with other technologies

Project trends





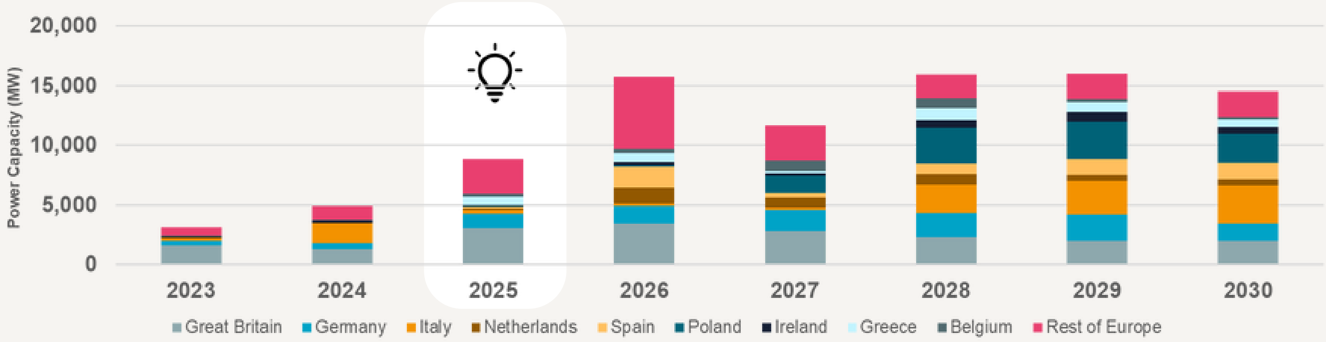
Co-locating batteries with conventional generation is common, due to cheaper connection and easier development

Co-location with renewables is growing

We forecast strong capacity growth in co-location with renewables by 2030

Forecast: 2025

FoM storage market forecast: New capacity additions (MW)



Commissioning the long construction queue

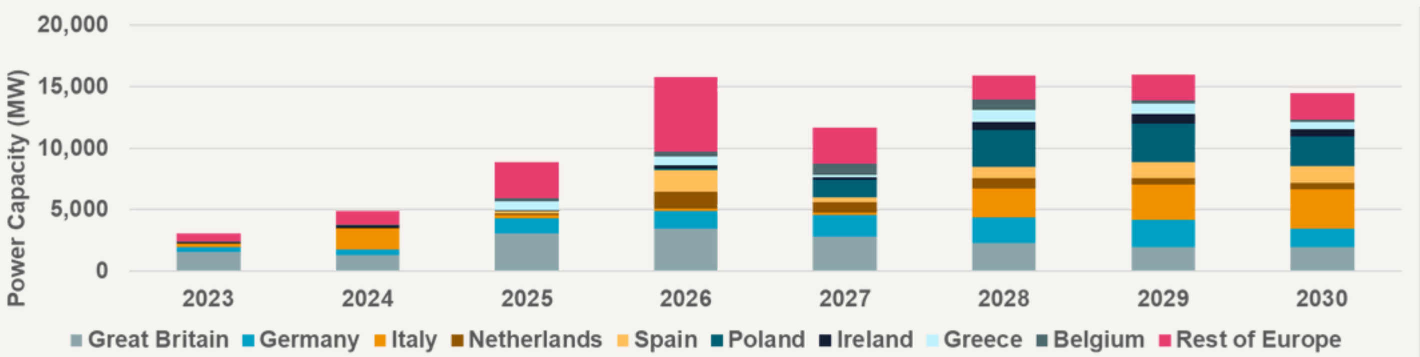
1-1.5GW in the Nordics, with a large peak in Finland

Grid boosters

Commissioning of the 2023-2024 auctions projects in Greece

Forecast: 2026-2027

FoM storage market forecast: New capacity additions (MW)



2026 peak driven support schemes and the Recovery and Resiliency Facility

Deployment rate drops in 2027

Growing number of merchant projects

Growing challenges in delivering the pipeline

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