



Global trends: US

RE-Users Summit 2020
Renewable Energy Institute
31 January 2020

Today's Presentation

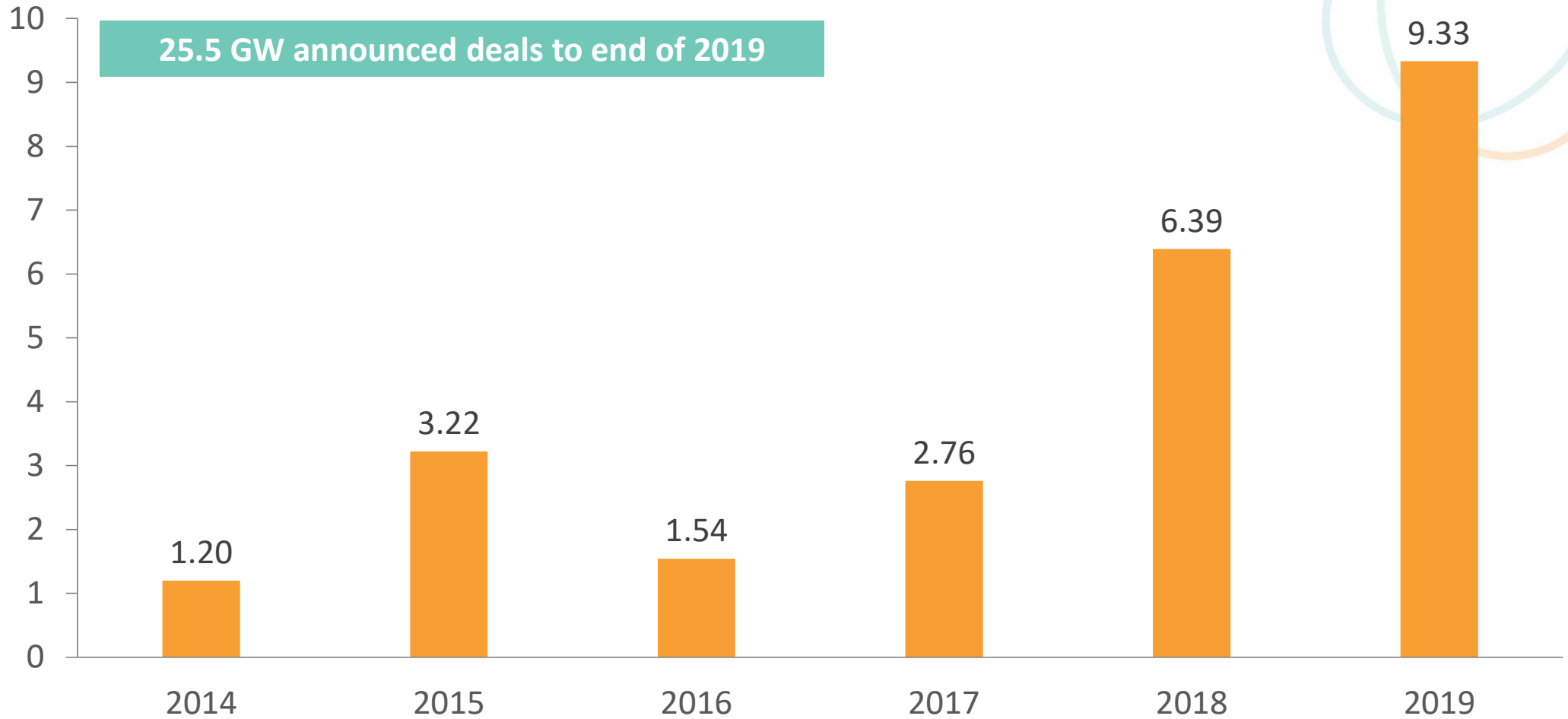


Mark Porter
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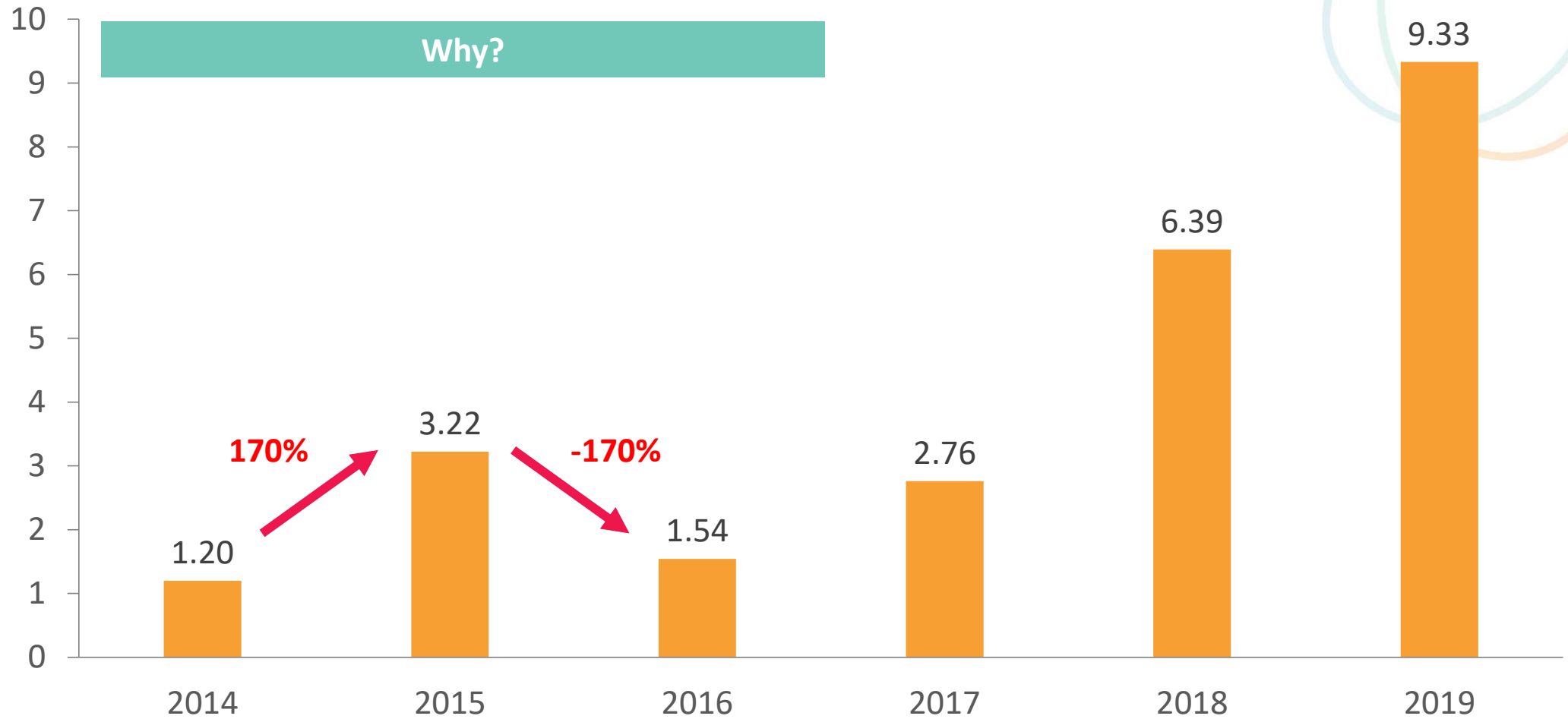
We will answer these questions

- What is the state of the US market?
- Why is the US market this way?
- Which companies have been buying?
- What technologies are being used?
- Where does the US market go from here?

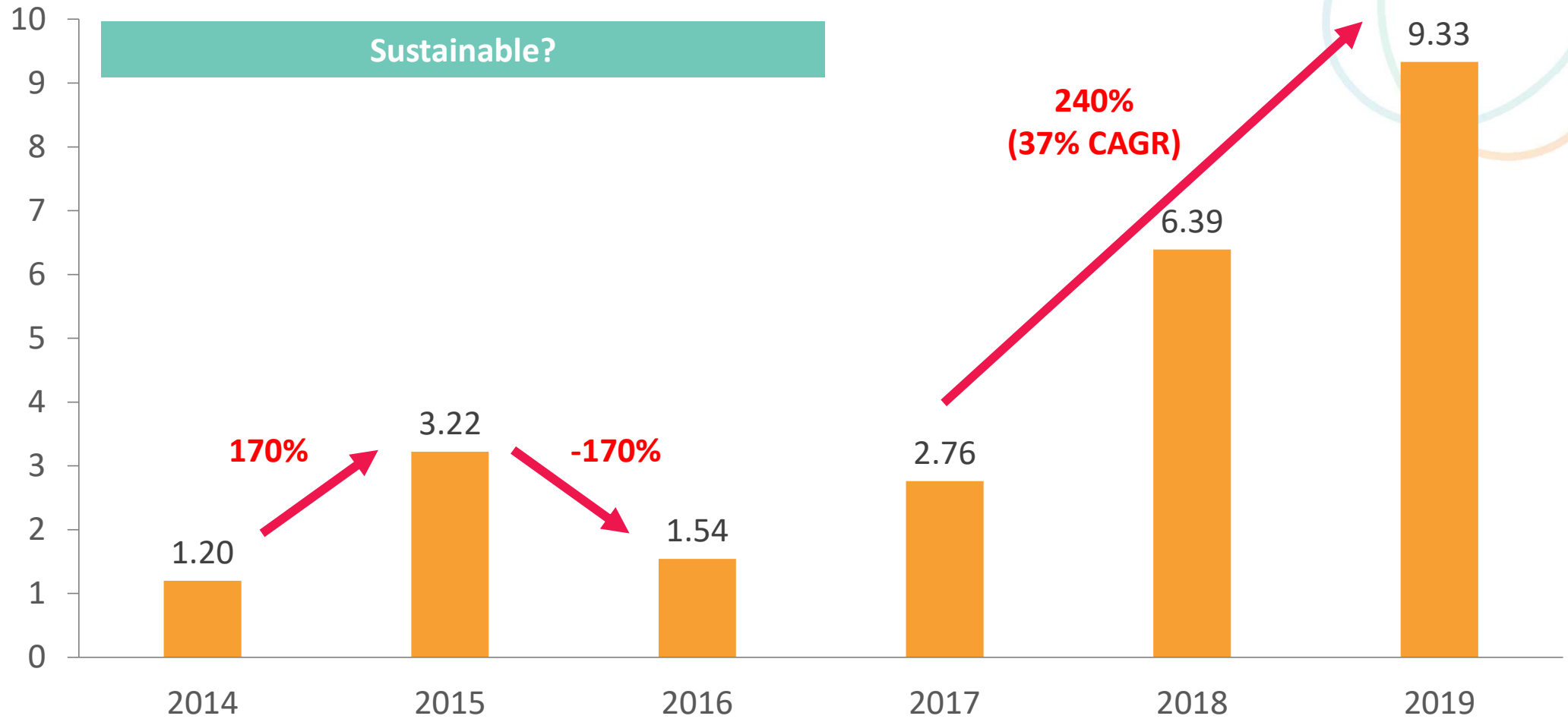
Announced corporate renewable energy transactions



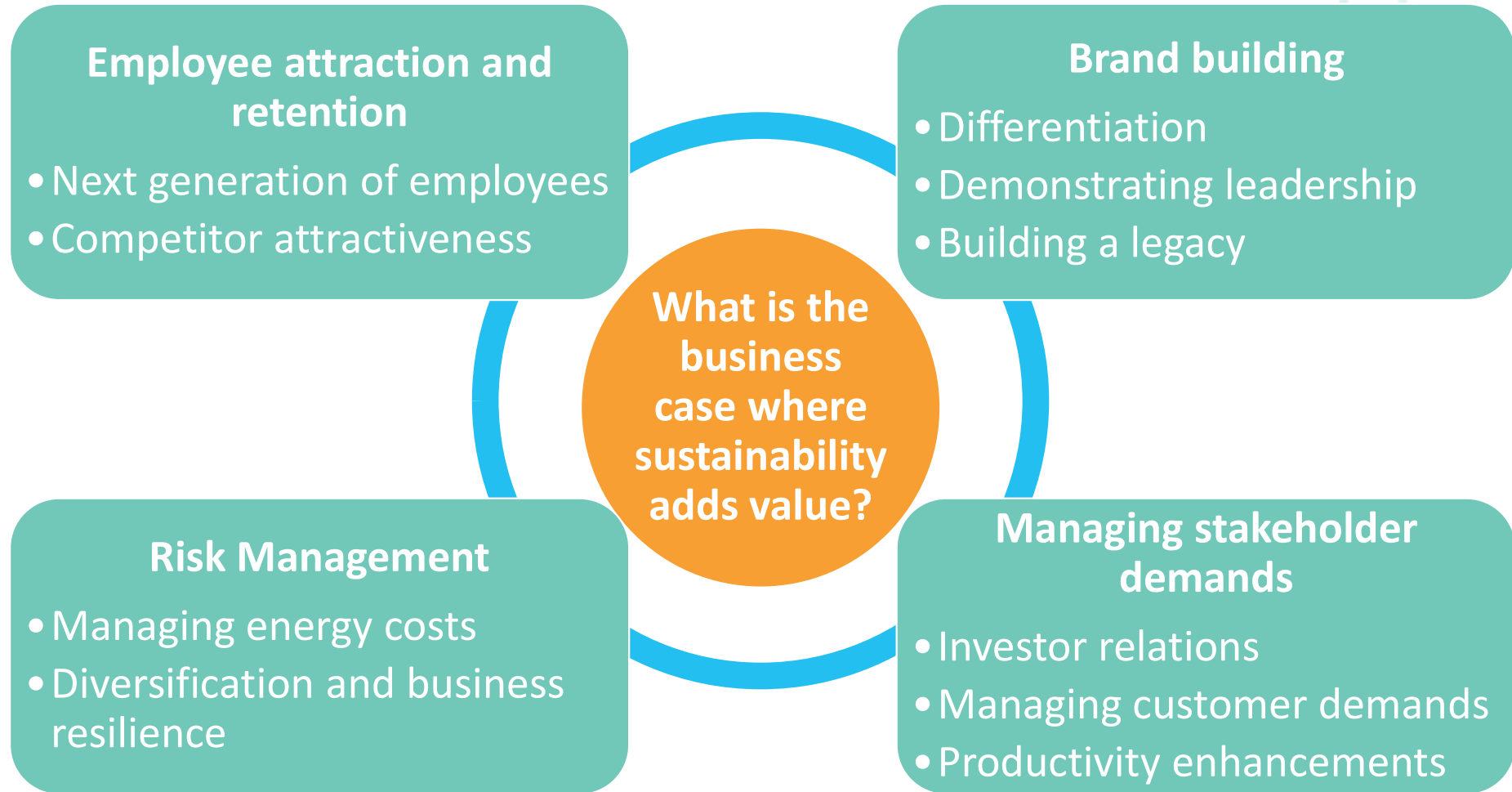
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Buyer motivators in the US



Renewable energy is mainstream

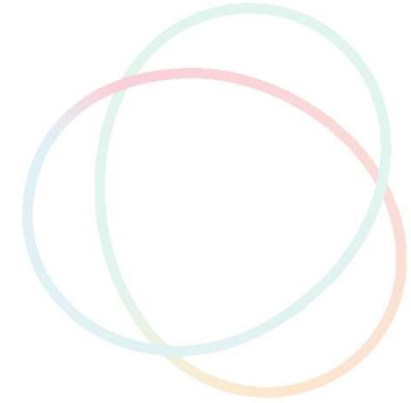
CORPORATE COMMITMENTS ARE GROWING

Over 200 companies have committed to go 100% renewable via the RE100 pledge



Renewable energy is mainstream

CORPORATE ACTION IS GROWING



732

Companies taking science-based climate action

312

Companies with approved science-based targets

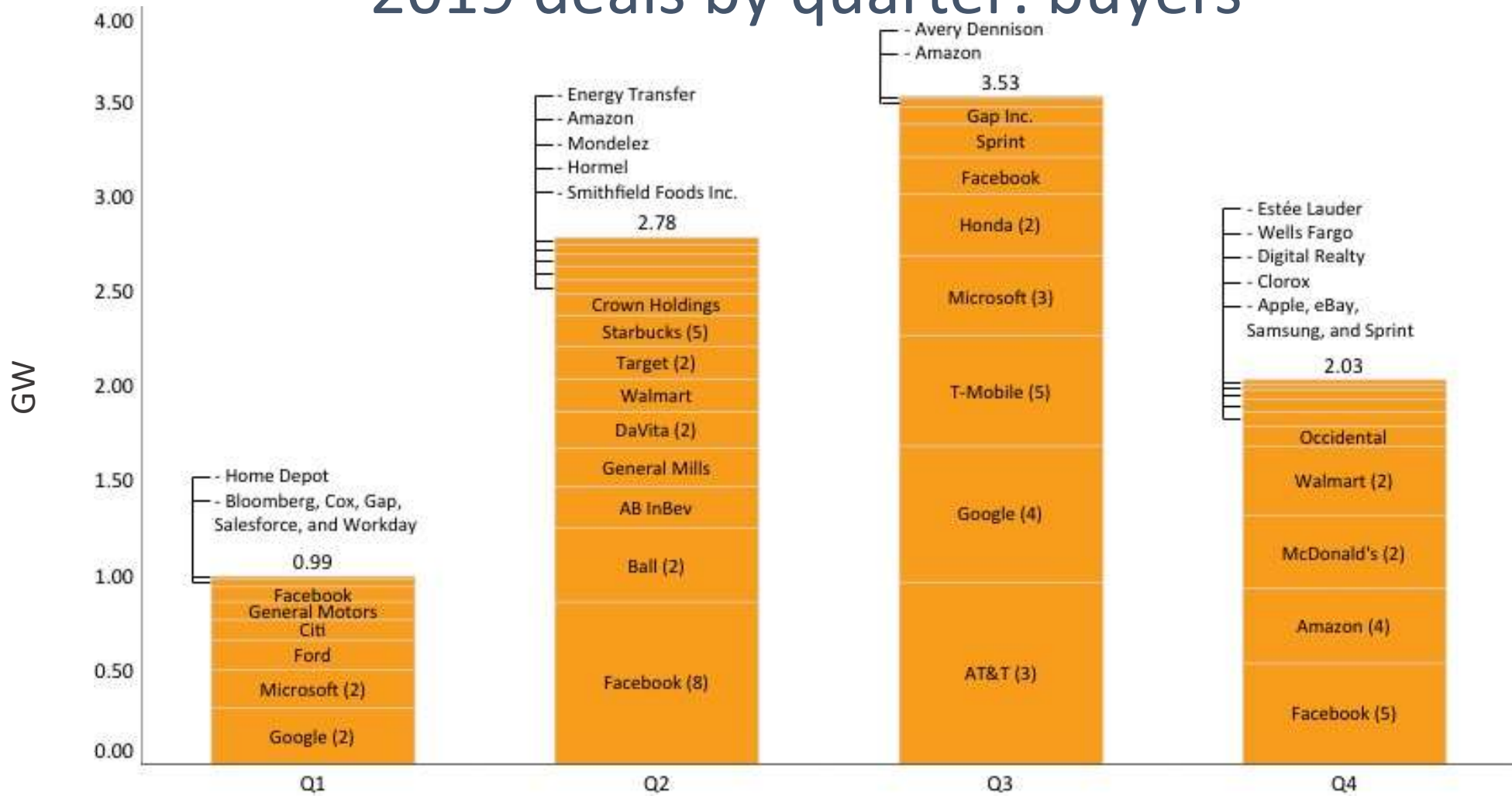
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Companies have signed the Corporate Renewable Energy Buyers' Principles

85

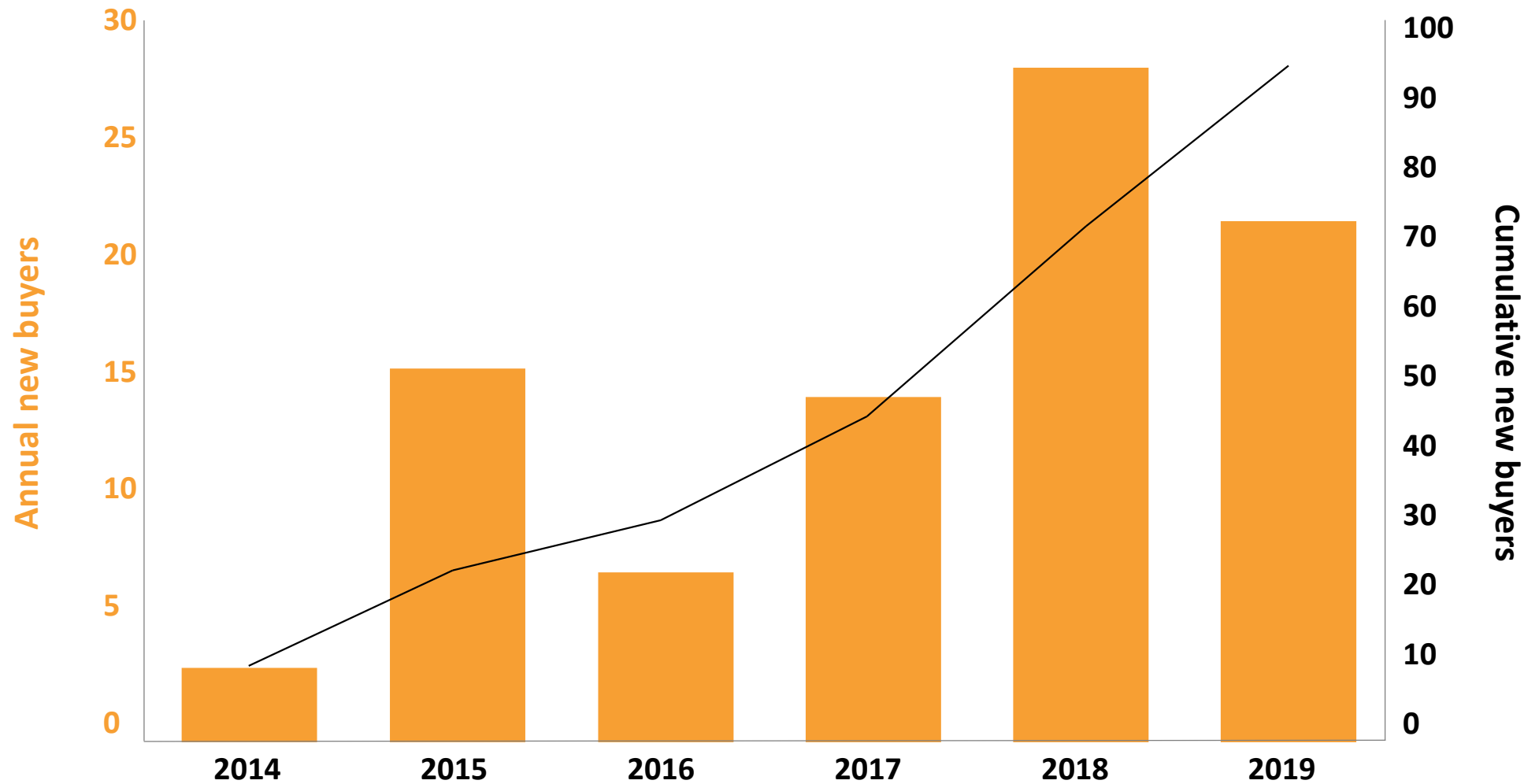
Companies have signed large-scale renewable energy deals in the US

2019 deals by quarter: buyers

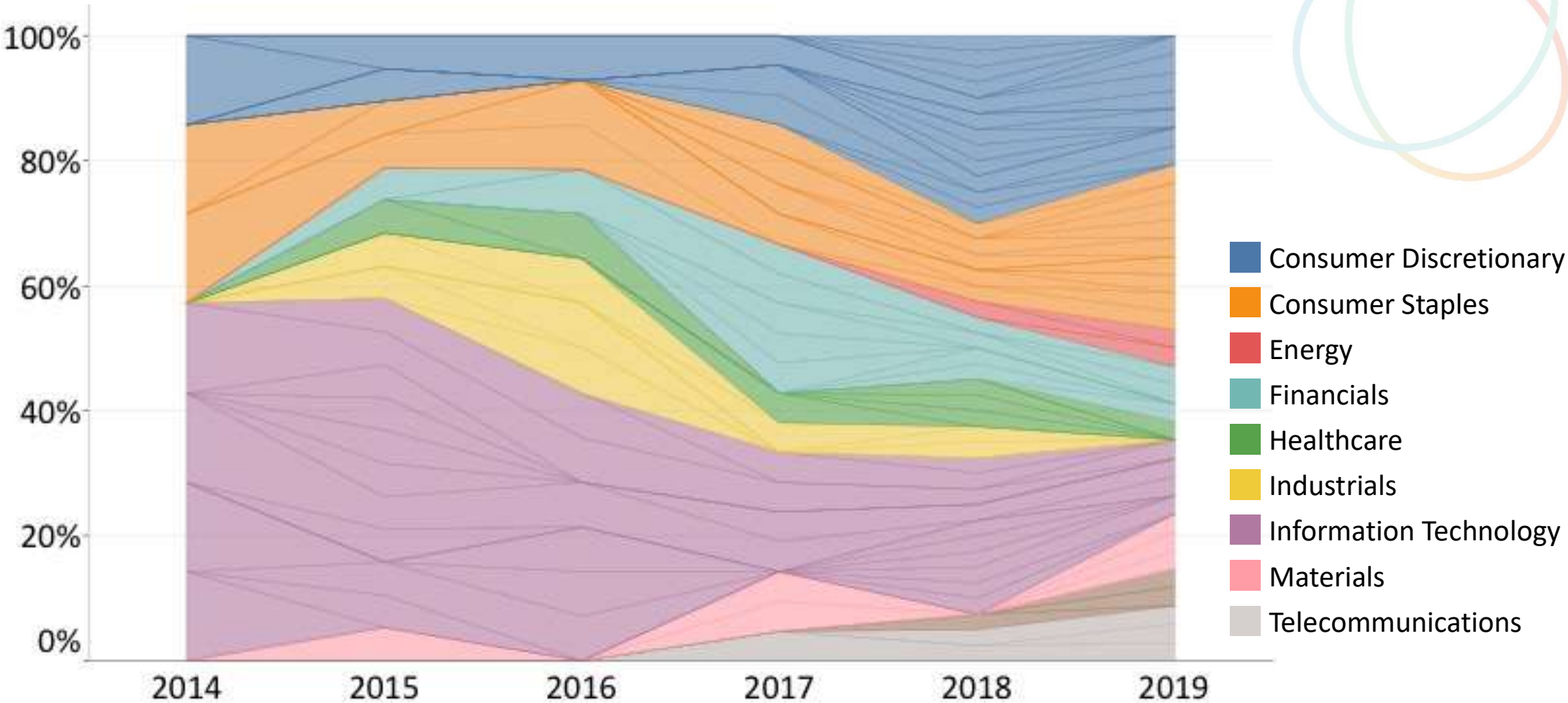


Publicly announced contracted capacity of corporate Power Purchase Agreements, Green Power Purchases, Green Tariffs, and Outright Project Ownership in the US, 2018 by quarter. Excludes on-site generation (e.g., rooftop solar PV) and deals with operating plants. (#) indicates number of deals each year by individual companies. Copyright 2019 by Renewable Energy Buyers Alliance

Ongoing market expansion – growth in new buyers

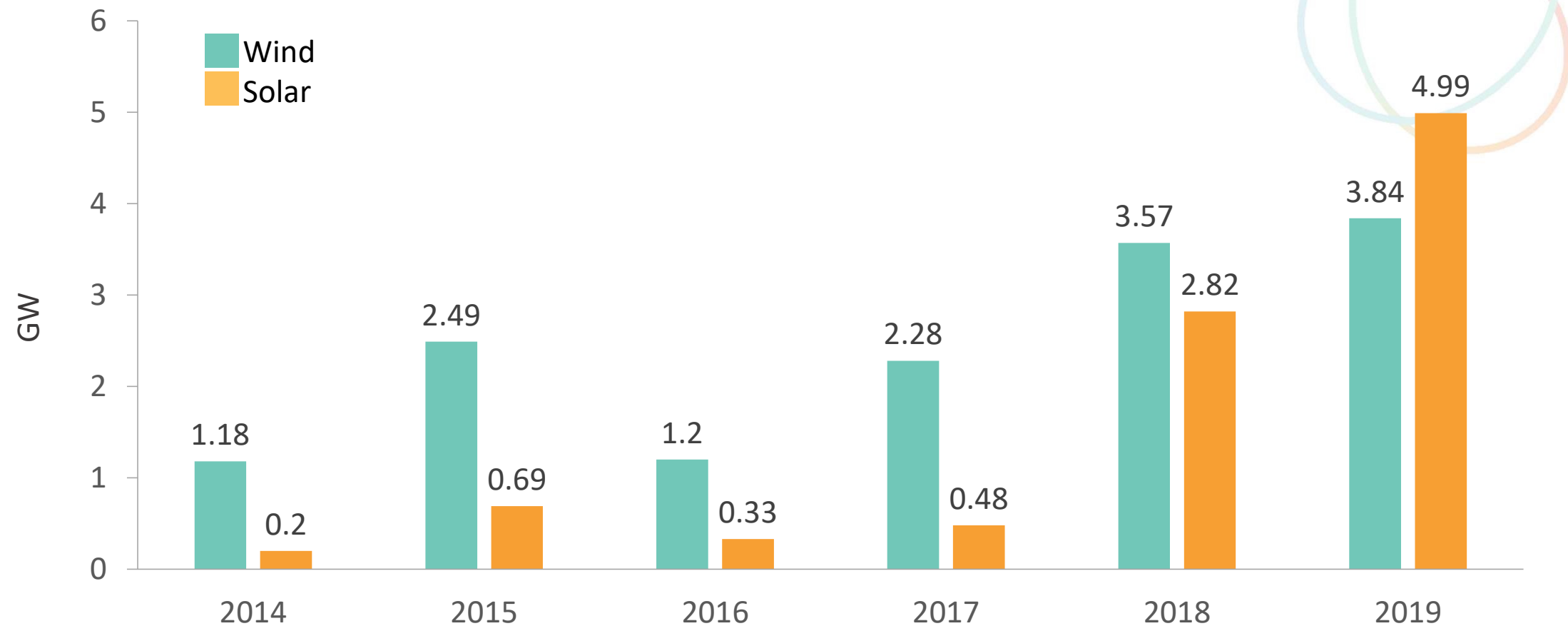


Annual unique buyers by industry segment



Publicly announced contracted capacity of corporate Power Purchase Agreements, Green Power Purchases, Green Tariffs, and Outright Project Ownership in the US, 2018 by quarter. Excludes on-site generation (e.g., rooftop solar PV) and deals with operating plants. (#) indicates number of deals each year by individual companies. Copyright 2019 by Renewable Energy Buyers Alliance

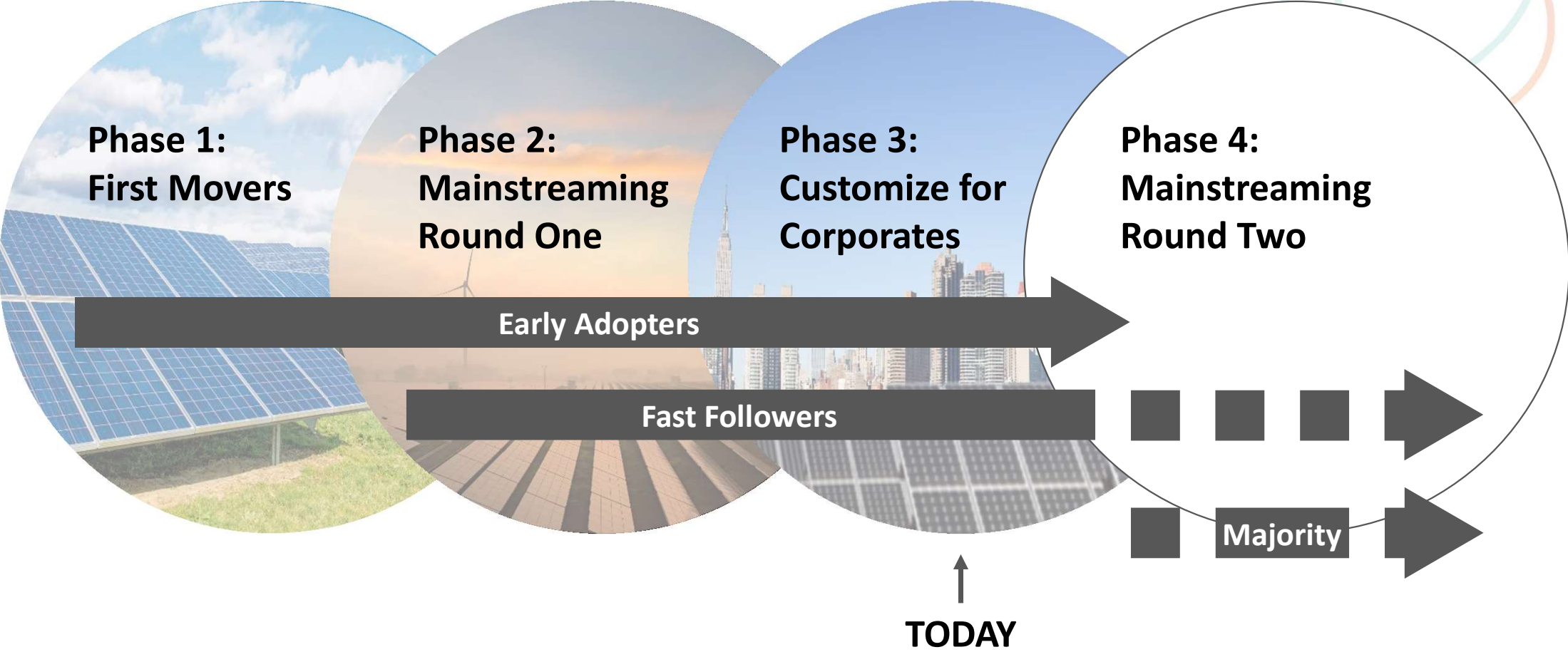
Technology evolution



**2019 excludes ~500 MWs of deals in which the technology is unknown*



The evolution of corporate renewables in the US





Predictions for the US market

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Near-term

Aggregated transactions will grow (in absolute MW terms)

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Demand for projects will outstrip supply, altering the risk landscape

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The real estate sector will become a major buyer group

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Long-term

Cost saving will become a significant transaction driver

REBA will meet it's 60GW by 2025 goal

Thank you!



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