



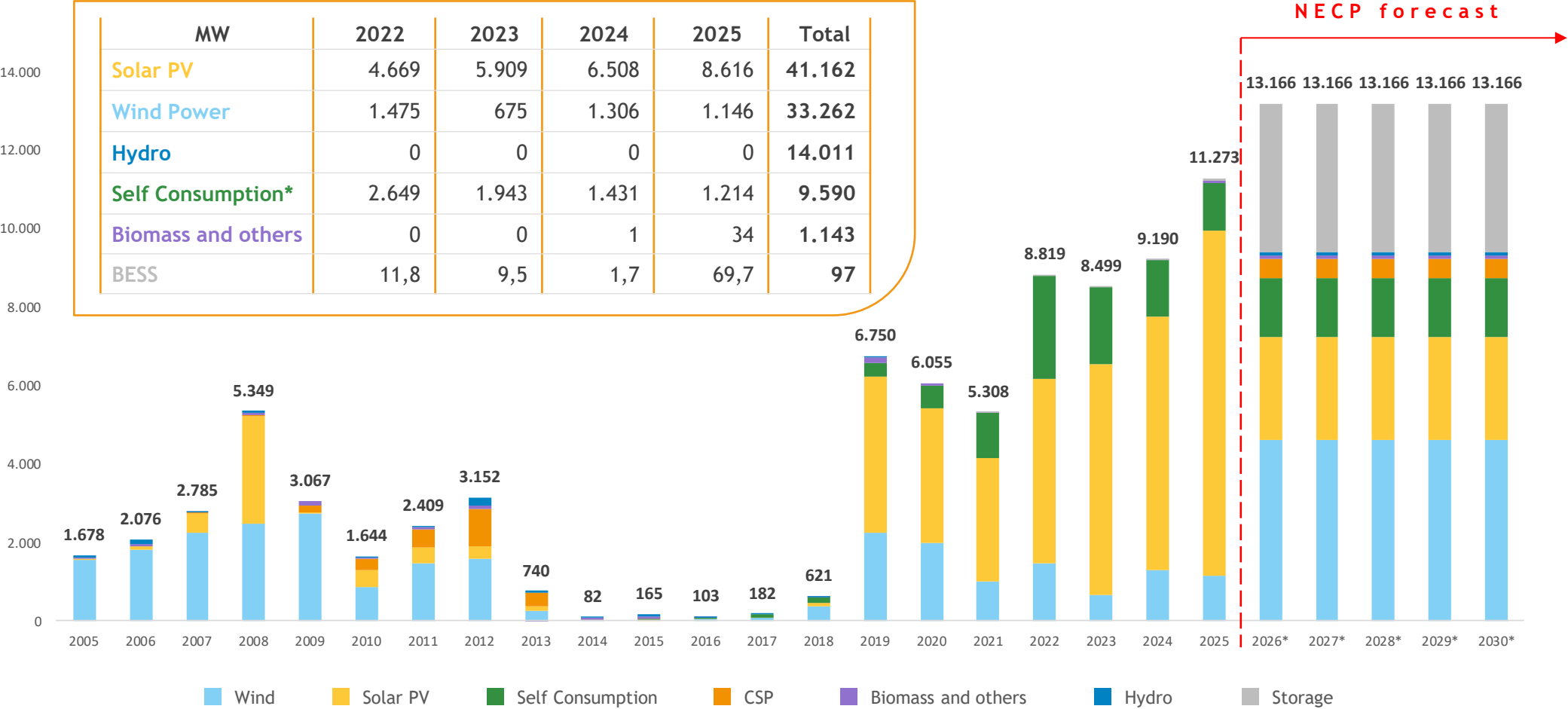
Spain's Renewable Momentum: From Growth to System Integration

SANTIAGO GÓMEZ RAMOS.
PRESIDENT, APPA RENOVABLES

19 JUNE 2026

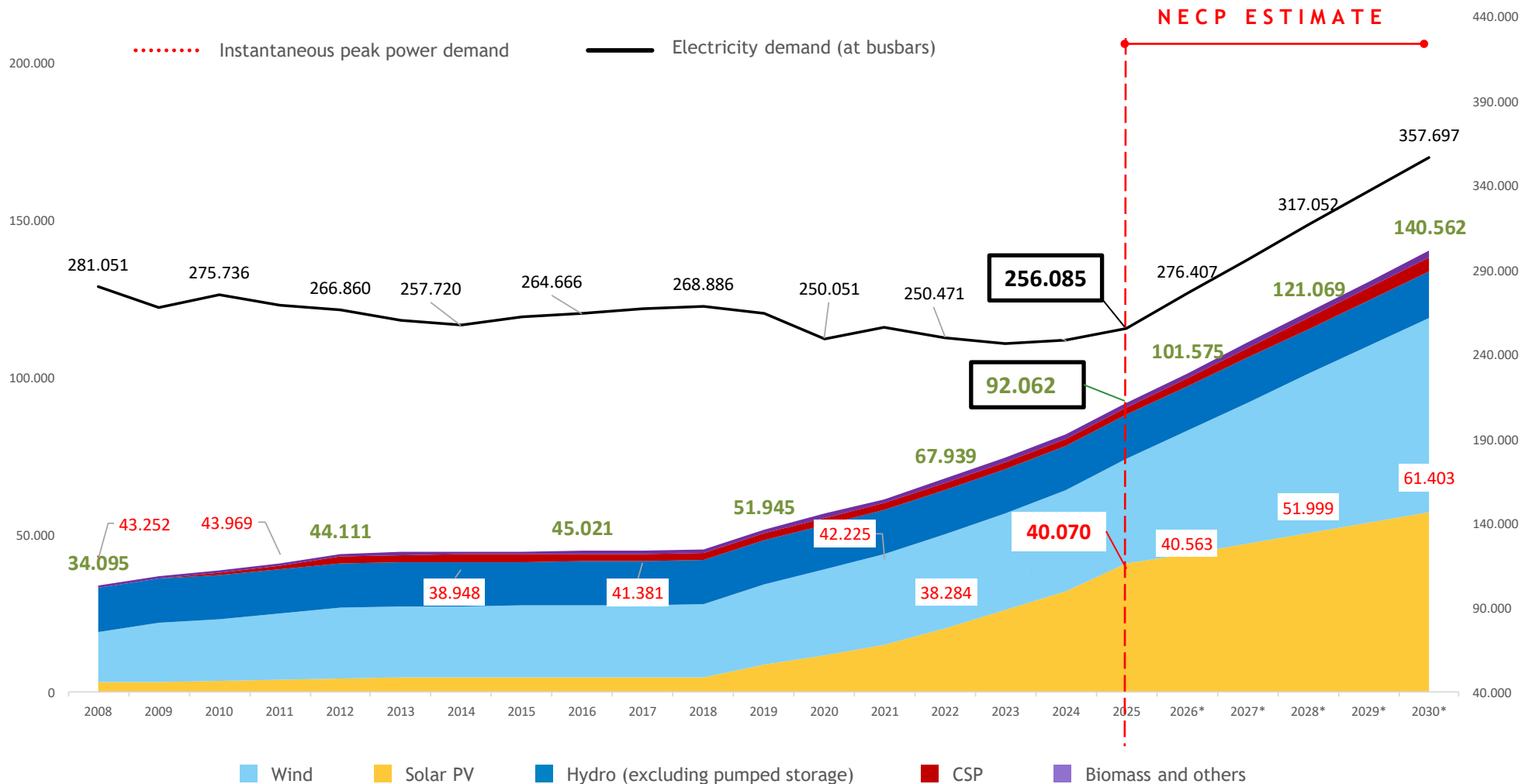


Installed capacity up to 2025 and NECP forecast to 2030





Cumulative capacity and electricity demand



Source: REE, MITECO and APPA Renewables analysis.



+170 %

Renewable installed capacity growth 2008-2025



-7,4 %

Instantaneous demand evolution 2008-2025



-8,9 %

Annual demand evolution 2008-2025



What's ahead - Strengths



- Record renewable capacity additions in the electricity system (11.273 MW in 2025).
- Regulatory progress: pumped hydro, storage, repowering, biogas...
- Demand evolution: confirmation of a positive trend.
- Renewables increasingly identified as a safeguard for energy security.





What's ahead - Watchpoints



- Real risk that **social opposition** may slow down the energy transition
- Political uncertainty** could hinder necessary investments
- Lack of clarity** on future technical requirements for projects
- Uncertainty** regarding **grid access and connection** for installations



18,93 €/MWh
Solar capture price
(Q1 2026)





What's ahead - Risks



- Failure to keep pace with the electrification needs
- Record volume of wasted energy – above 20% of producible output: curtailments, restrictions and reinforced operation
- Unsustainable scenario of zero and negative prices: same low price that benefits consumers is strangling solar producers
- Strong imbalance between technologies 2019-2025: 45,682 MW solar PV; 9,833 MW wind; 249 MW biomass; 34 MW hydro
- Taxation running counter to decarbonisation and electrification targets
- Need to increase biofuel blending percentages (E10 and B10) and boost renewable gases



Thank you



Sede Madrid:
Av. Alberto Alcocer 46B,
5°C, 280016 Madrid
Tel. 91 400 96 91

www.appa.es

