

Select Stories

Fuel & Heating | RNG producer Vanguard Renewables acquired by BlackRock

Fuel & Heating | Archaea gets double-plus credit bump to help close deals

Electrical Generation | Eni & HitecVision plan expansion of renewables JV Vårgrønn

Electrical Generation | Lekela changes hands for \$1.5B, Africa's largest renewables deal

Electrical Generation | Opdenergy raises €200MM in IPO, signs €350MM green line

Energy Storage | Equinor enters U.S. battery sector with East Point Energy buy

Materials & Services | MasTec seeks more renewables work via \$1.1B acquisition of IEA

Section Index PG.

Fuel & Heating	3
Electrical Generation	8
Energy Storage	18
Materials & Services	21
ESG	28

Recurring Tables & Graphs PG.

Actual & Forecast	20
Clean Energy Market Performance	27
Electricity Pricing	17
Proposed Generation	17
Renewable Energy Top 40	16
Renewable Stock Movers	27
Top 10 M&A Deals	27
U.S. Renewable Generation Projects	11
Weekly ISO Lookback	20

Phillips 66 and H2 Energy to create hydrogen retail network

Phillips 66 and leading European hydrogen provider H2 Energy have partnered up to build out and operate a network of about 250 hydrogen refueling retail sites in Germany, Austria and Denmark. Their new company, JET H2 Energy Austria GmbH, is owned 50:50 by the U.S.-based refiner and H2 Energy Europe, itself a JV of H2 Energy and commodity trading firm Trafigura. The companies first indicated their intention to create the JV in February, with the aim of leveraging Phillips 66's retail expertise to boost H2 Energy's hydrogen development efforts in Europe.

"We will make hydrogen a leading energy solution for emission-free mobility," said Olaf Borbor, CEO of JET H2 Energy. The JV's network of hydrogen refueling stations for heavy- and light-duty and passenger vehicles will include both new locations and existing retail stations that already offer Phillips 66's JET brand. The JV will seek government funding, where applicable, for the development of the refueling network.

Phillips 66 has more than 1,000 JET-branded stations in Europe and a growing hydrogen refueling network in Switzerland through its JV with Coop Mineraloel AG. Through its Emerging Energy organization, the company is pursuing opportunities in the areas of hydrogen, renewable fuels, batteries and carbon capture. H2 Energy says it was the first company to develop and deliver hydrogen fuel cell trucks to commercial users and create a green hydrogen fueling ecosystem in Switzerland.

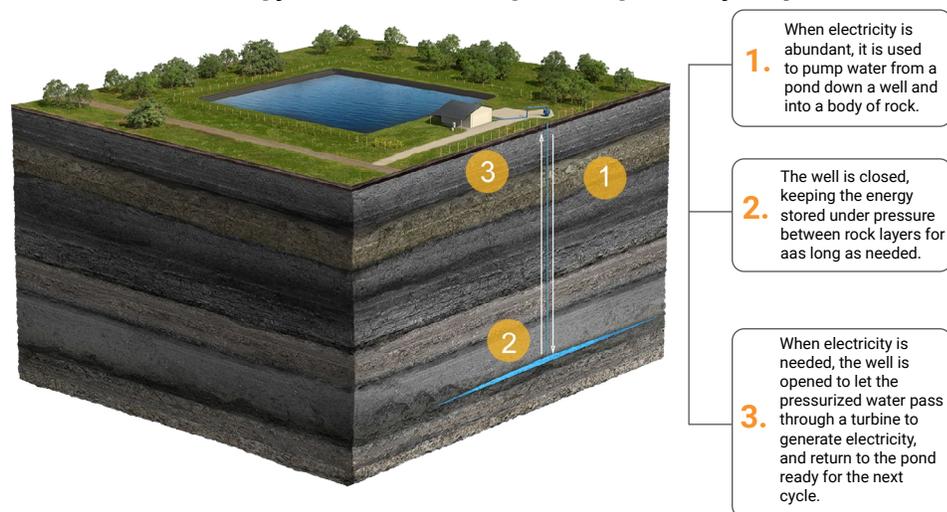
As energy transition unfolds, so do chances for OFS to adapt

The world appears to be set firmly on the path of energy transition away from oil and gas over the coming decades. The timeline for peak oil demand is less clear than it was following Russia's invasion of Ukraine, but Enverus Intelligence™ | Research still believes it likely to occur before 2030. While there will continue to be significant work for oilfield services companies over the coming decades, as the global energy mix moves further into cleaner alternatives, there will ultimately be less work to go around in the legacy oil and gas industry.

However, there are already some opportunities for OFS firms to adapt and apply their skills in the changing environment, such as drilling wells for CCS projects. Companies are also developing novel renewable energy technologies that require OFS expertise and skillsets.

Three such companies are Quidnet Energy, Eavor and Proton Technologies, whose technology requires either drilling new wells or repurposing existing oil fields and infrastructure, and more innovators are likely just over the horizon. [Read more...](#)

Quidnet Technology Built on Existing Drilling and Hydropower Tech



Source | Quidnet website accessed 07/21/22

Activity Index

Company	Primary Activity	Location	PG.
Actis	Actis funds Rezolv for clean power in central & SE Europe	Electrical Generation	12
Aker Solutions	Aker Solutions demands reform after warning of loss on project	Materials & Services	25
Anaergia	Anaergia to build second biogas plant in Japan for Toyo	Fuel & Heating	6
Archaea Energy	Archaea gets double-plus credit bump to help close deals	Fuel & Heating	4
Boralex	Boralex adds 338 MW in U.K. with buyout from Infinergy	Electrical Generation	14
BrightNight	BrightNight-Cordelio solar JV to provide 300 MW to Arizonans	Electrical Generation	8
Buckeye Partners	Buckeye to build Nova Scotia hydrogen hub on failed LNG site	Fuel & Heating	3
Canadian Solar	Canadian Solar sells New South Wales solar farms to CalEnergy	Electrical Generation	9
Cubico Sustainable Investments	Canada's Cubico acquires 2 wind farms to become Uruguay leader	Electrical Generation	9
Eni	Eni & HitecVision plan expansion of renewables JV Vårgrønn	Electrical Generation	12
Eni	Eni pausing on IPO of its renewables and retail business	Electrical Generation	12
Enlight Renewable Energy	Enlight agrees to buy 525 MW Croatian renewables portfolio	Electrical Generation	14
Equinor	Equinor enters U.S. battery sector with East Point Energy buy	Energy Storage	18
Everfuel	Everfuel inks deal for green hydrogen supply to Crossbridge	Fuel & Heating	7
EverGen Infrastructure Corp.	EverGen grows its energy circle with an Alberta family's biogas	Fuel & Heating	3
FGE Power	FGE sells Goodnight wind project in Texas to Omega Energia	Electrical Generation	8
FortisBC Energy	FortisBC & Suncor dip toes into turquoise hydrogen game	Fuel & Heating	5
Fred. Olsen Renewables	Investors back Fred. Olsen wind projects with €480MM	Electrical Generation	10
Fulcrum BioEnergy	Fulcrum BioEnergy gets second strategic equity buy from SK	Fuel & Heating	5
GE	GE to spin off energy biz under GE Vernova brand name	Materials & Services	21
GKN Hydrogen	GKN Hydrogen building storage demonstrator in Colorado	Fuel & Heating	4
Hitachi Energy	Hitachi to work with H2GS on Boden hydrogen and steel plant	Fuel & Heating	6
Iberdrola	Iberdrola's nearly 1.2 GW Tâmega Gigabattery project complete	Energy Storage	18
JinkoSolar Holding	Module maker JinkoSolar plans \$200MM equity buyback	Materials & Services	21
Jupiter Power	Jupiter Power starts up 200 MW battery storage in West Texas	Energy Storage	18
Koch Engineered Solutions	Koch affiliate lands EPC for Fidelis' ambitious fuel facility	Materials & Services	26
Leeward Renewables	Leeward Renewables gets new financing to make Rabbitbrush run	Electrical Generation	8
Lekela	Lekela changes hands for \$1.5B in Africa's largest renewables deal	Electrical Generation	13
Mainstream Renewable Power	Mainstream to add AOW as Aker Horizons unites wind holdings	Electrical Generation	13
MasTec	MasTec seeks more renewables work via \$1.1B acquisition of IEA	Materials & Services	22
Monolith	Hydrogen maker Monolith attracts \$300MM in new investment	Fuel & Heating	3
Nabors Industries	Nabors leans further into transition with battery investment	Materials & Services	21
Opal Fuels	ArcLight SPAC & Fortistar's Opal Fuels complete combo	Fuel & Heating	4
Opdenergy Holdings	Opdenergy raises €200MM through IPO, signs €350MM green line	Electrical Generation	14
Orbital Marine Power	Orbital Marine raises £8MM for tidal turbine project	Electrical Generation	10
Ørsted	Ørsted moves ahead with 2.85 GW Hornsea 3 after U.K. contract	Electrical Generation	10
Phillips 66	Phillips 66 & H2 Energy to create hydrogen retail network	Fuel & Heating	1
PNC Bank	PNC signs supply deal covering 78 MW of Mammoth Central	Electrical Generation	8
Polar Night Energy	Polar Night brings sand into energy storage mix for first time	Fuel & Heating	6
Powerhouse Energy Group	Powerhouse enters JV to turn plastic into hydrogen in Ireland	Fuel & Heating	6
Preem	Swedish refiner Preem issues its first green bond at €340MM	Fuel & Heating	6
Renewable Power Capital	CPPIB-backed RPC signs €130.7MM bridge for Swedish wind farm	Electrical Generation	12
Schlumberger	Schlumberger to debut rig with Hyzon fuel cells as early as Q4	Energy Storage	19
Shell	Shell adds new hydrogen project to growing Rotterdam hub	Fuel & Heating	7
Technip Energies	Technip Energies gets up to €500MM of carbon capture EPC	Materials & Services	21
Tidewater Renewables	Tidewater Renewables generating revenue through CFR credits	Fuel & Heating	5
Vanguard Renewables	RNG producer Vanguard Renewables acquired by BlackRock	Fuel & Heating	3
Vibra Energia	Vibra investing in ZEG Biogas with eventual takeover in mind	Fuel & Heating	7
Vitol	Vitol leads \$100MM funding round for FlexGen Power Systems	Energy Storage	18

Fuel & Heating

RNG producer Vanguard Renewables acquired by BlackRock

A fund managed by BlackRock Real Assets acquired Vanguard Renewables, which converts agriculture and organic food waste to renewable natural gas, from Vision Ridge Partners for an undisclosed amount. BlackRock Real Assets, part of the BlackRock investing behemoth that had \$10 trillion in assets under management at YE21, will drive Vanguard's plans to commission more than 100 anaerobic digesters to produce RNG across the country by 2026, according to a July 20 announcement. Colorado-based Vision Ridge, which manages about \$2.5 billion in investments, first invested in Vanguard at its formation in 2014.

Plans to commission over 100 anaerobic digesters to produce RNG across U.S. by 2026.

"Renewable natural gas is an attractive and fast-growing market that provides decarbonization solutions for both the provider of the waste as well as the natural gas consumer," said Mark Florian, head of diversified infrastructure at BlackRock Real Assets.

Vanguard owns and operates one of the largest waste-to-RNG projects in the U.S., a facility at Goodrich Family Farm in Vermont with two 925,000-gallon anaerobic digesters. The company's proprietary Farm Powered anaerobic co-digestion process converts inedible food and beverage waste and dairy manure into RNG and liquid low-carbon fertilizer. A separate business line called Vanguard Ag, developed as part of a multi-year partnership with Dominion Energy in 2019, converts manure into RNG.

Hydrogen maker Monolith attracts \$300MM in new investment

Private equity group TPG Capital, fund manager BlackRock and Singapore wealth fund Temasek led a \$300 million investment round in 10-year-old Nebraska methane pyrolysis company Monolith Inc. through their TPG Rise Climate decarbonization investment platform. Monolith said existing investors NextEra Energy Resources, SK, Mitsubishi Heavy Industries America and Azimuth Capital Management also participated in the round. Cornell Capital and Warburg Pincus—which did not participate in the new round—and Azimuth will retain their combined majority ownership stake in the company.

Lincoln-based Monolith produces hydrogen and carbon black through a methane pyrolysis process at a Hallam, Nebraska, plant. It also has R&D facilities in San Carlos, California; Denver; and Kansas City, Kansas. Its Olive Creek 2 production facility is expected to be completed in 2026.

In addition to the funds contributed by its institutional investors, Monolith is set to receive a loan for more than \$1 billion from the U.S. Department of Energy to expand its production facilities in Nebraska. The company has conditional approval for the loan, which is subject to the satisfaction of final conditions.

EverGen grows its energy circle with an Alberta family's biogas

Renewable natural gas producer EverGen Infrastructure Corp. completed its purchase of a 67% stake in Alberta-based anaerobic digestion company Grow the Energy Circle Ltd. for \$2.1 million cash, subject to working capital adjustments, and 600,000 common shares. Located on a family farm near Lethbridge, Alberta, Circle operates a biogas facility consisting of an anaerobic digester that has converted biodegradable waste into biogas for more than seven years. EverGen said in a July 14 press release that additional cash consideration of up to \$4 million would be made in connection with the acquisition upon Circle achieving certain operational milestones.

EverGen and Circle will enhance the current system's RNG capacity in two phases. Phase 1, which will be completed by Q4, will bring output up to an expected 80 TJ of RNG per year, or about 207 Mcf/d. Phase 2 will bring the system up to an eventual 140 TJ of RNG per year, or about 360 Mcf/d. The project has an offtake agreement with utility FortisBC.

EverGen CEO Chase Edgelow said the company is "moving toward the potential to produce over 1,000,000 GJ of RNG annually," which would equate to about 2.6 MMcf/d. It recently announced that it will buy 50% of three RNG projects in Ontario from Northeast Renewables LP.

Buckeye to build Nova Scotia hydrogen hub on failed LNG site

Buckeye Partners has acquired Bear Head Energy, giving new life to an industrial site in Point Tupper, Nova Scotia, with 251 acres of land and a 68-acre water lot that originally was intended to hold an LNG facility. Instead, Buckeye plans to develop a large-scale green hydrogen and ammonia production, storage and export project with hydrogen electrolyzer capacity of over 2 GW. Financial terms of the transaction, originally announced May 5, were not disclosed.

Bear Head envisioned as LNG import terminal in 2005, later for shale gas export.

"Buckeye's intention with this acquisition is to develop a large-scale green energy production, distribution and export hub," CEO Todd Russo said. "Given the project's unique features and the geographic advantages of the region, including its status as one of the top locations globally for wind energy generation, we believe that this has the potential to become one of the world's premier green hydrogen production facilities."

Under a phased development plan, Buckeye plans to partner with onshore and offshore renewable energy developers to build out a large-scale green hydrogen hub for Atlantic Canada. Wholly owned by IFM Global Infrastructure Fund, Buckeye operates more than 5,500 miles of U.S. pipeline and more than 115 liquid petroleum products terminals.

LNG plans for Bear Head date back to 2005, first as an import terminal and then as an export facility after the shale revolution. The project accumulated all the permits and environmental approvals required to begin construction but never made it to the FID stage, and a feedgas pipeline was never built. Liquefied Natural Gas Ltd. acquired the project in 2014 and put it up for sale in 2020. Its other project, Magnolia LNG in Louisiana, sold to a subsidiary of Glenfarne Group for \$2.0 million in May 2020.

Fuel & Heating

Archaea gets double-plus credit bump to help close deals

Lenders for renewable natural gas producer Archaea Energy Inc. more than doubled the company's borrowing capacity, increasing commitments to its credit agreement by \$630 million to a total of \$1.1 billion. The aggregate commitments surpass an earlier estimated total of \$920 million in commitments from the Comerica-led group.

Archaea's credit agreement consists of a \$400 million senior secured term loan credit facility and a \$700 million senior secured revolving credit facility. Interest rates will stay at SOFR plus 275 bps for the revolver and SOFR plus 325 bps for the term loan. The Sept. 15, 2026, maturity is unchanged.

"The successful amendment and upsize of our bank facilities is a momentous achievement for Archaea, one that puts us in a strong position to successfully execute on the robust project backlog we have worked diligently to develop over the past year," co-founder and CEO Nick Stork said. The company has plans for the funding: It will acquire NextGen Power Holdings and its subsidiaries—collectively called Ingenco—fund capital expenditures related to its Lightning Renewables JV with waste company Republic Services, and fund other capex and working capital needs. The company plans to spend \$270 million on capex this year.

Archaea said its available capacity, along with other existing liquidity sources, is sufficient to fund its acquisition of Ingenco, which its Archaea Infrastructure sub agreed to buy in April. The company will pay \$215 million to Castleton Commodities International's Riverview Investment Holdings unit for the Ingenco platform, which includes 14 operating landfill gas-to-electric plants and the rights for these sites. The company estimates pro forma long-term annual RNG production of about 7 Tbtu, or about 20 MMcf/d, and more than 500,000 MWh of net annual electricity generated once development projects associated with the Ingenco assets are completed and ramped to full flows.

In its Lightning Renewables JV, Archaea will develop, engineer, construct and operate 39 RNG facilities at Republic Services' landfills in 19 states. It will begin construction later in 2022, with completion and commissioning planned through 2027. When fully operational, the 39 projects are expected to generate more than 12.5 Tbtu of RNG annually, or about 36 MMcf/d. The JV also signed a gas sale agreement with Republic to provide for the long-term ability to process landfill gas. It will contribute around \$800 million to Republic's \$300 million over the next five years.

Archaea went public via combinations with blank-check company Rice Acquisition Corp. and Novi, Michigan-based landfill gas company Aria last September.

Lightning Renewables JV to Invest ~\$1.1B in RNG Development

- Archaea chosen to partner with Republic for landmark RNG development joint venture, Lightning Renewables
 - Lightning Renewables has signed a long-term master gas sale and development agreement to develop RNG facilities at 39 landfill sites owned or operated by Republic
 - Investments into Lightning Renewables are expected to total ~\$1.1 billion, with approximately \$780 million to be invested by Archaea
 - Archaea will hold a 60% ownership interest in Lightning Renewables and expects to receive distributions made with respect to its ownership interest
- RNG development projects located at sites with strong growth potential and current cumulative gross flows of ~13 million MMBtu per year¹
- Archaea will develop, engineer, construct, and operate the RNG facilities, which will be located across 19 states
 - We will receive EPC fees during development and construction and O&M fees after completion for these services
 - Development and construction is expected to begin in 2022, with completion and commissioning of projects planned through 2027
- We expect potential for adding incremental projects into Lightning Renewables and potential upside through incremental initiatives including wellfield optimization, carbon intensity reduction, and low-carbon hydrogen



1. Calculated using current landfill gas flows into sites and assuming 50% methane content on average across sites.

Source | Archaea Energy 06/23/22 presentation via Enverus docFinder

ArcLight SPAC & Fortistar's Opal Fuels complete combo

Renewable natural gas producer and distributor Opal Fuels LLC has completed its merger—originally announced last December—with ArcLight Clean Transition II, a SPAC formed by ArcLight Capital Partners that went public in March 2021. Class A ordinary shares and warrants of the new entity, renamed Opal Fuels Inc., began trading on the Nasdaq under the ticker symbols OPAL and OPALW, respectively.

Opal was a combination of two Fortistar companies engaged in methane and RNG with heavy-duty compressed natural gas company TruStar Energy. As of May 1, Opal owned and operated 24 biogas projects of which five are RNG and 19 are renewable power. The company also has seven RNG projects under construction and 15 more in development, according to its May investor presentation.

GKN Hydrogen building storage demonstrator in Colorado

Hydrogen storage system provider GKN Hydrogen is partnering with utility Southern California Gas Co. and the U.S. Department of Energy's National Renewable Energy Laboratory to install and demonstrate its HY2MEGA storage subsystem at the latter's Flatirons Campus near Boulder, Colorado. GKN said the technology can enable safe, long-duration storage without the need for compression and at scale could provide resilient power in case of widespread outages. The three-year project is expected to begin by YE22.

Two HY2MEGA storage subsystems will be connected to an electrolyzer and fuel cell at an Advanced Research on Integrated Energy Systems facility on the Flatirons Campus. The electrolyzer will produce green hydrogen for the storage subsystems, which store hydrogen in solid-state metal hydrides under low pressure. The fuel cell will then convert stored hydrogen into electricity. The two HY2MEGA systems will add an additional 500 kg of hydrogen storage on site, GKN Hydrogen said.

Fuel & Heating

Fulcrum BioEnergy gets second strategic equity buy from SK

SK Innovation Co., the energy arm of South Korean conglomerate SK Group, has made a second equity investment in Fulcrum BioEnergy Inc., which makes fuel from landfill waste. According to a July 12 announcement, SK has bought an additional \$20 million of Fulcrum's equity, bringing its total investment in the Pleasanton, California-based company to \$70 million after first getting involved with Fulcrum last December. Fulcrum and SK are also working toward an exclusive licensing agreement to bring Fulcrum's proprietary waste-to-fuel technology to South Korea and other Asian countries.

The latest investment follows the startup of Fulcrum's Sierra BioFuels plant near Reno, Nevada. Sierra is the company's inaugural biorefinery, which converts the landfill waste into a synthetic gas that can then be converted into liquid fuel. The company also announced last December that it would take on Chicagoland landfill waste with a plant in Gary, Indiana, that will begin construction in 2023. In aid of the funding for that plant, the Indiana Finance Authority issued \$375 million of environmental improvement revenue bonds for a Fulcrum subsidiary.

FortisBC & Suncor dip toes into turquoise hydrogen game

FortisBC Energy, Suncor Energy and Hazer Group Ltd. are partnering to build a "turquoise hydrogen" pilot project in Port Moody, British Columbia. The project will be located at Suncor's Burrard Terminal site and will use an innovative methane pyrolysis technology to produce hydrogen from natural gas while storing the carbon byproduct as solid synthetic graphite that can be sold for manufacturing or industrial purposes, FortisBC said. If the pilot continues as a full commercial buildout, it is expected to produce up to 2,500 tonnes of hydrogen annually. The partners and B.C.'s CleanBC Industry Fund are funding the project.

The first phase is currently underway, including front-end engineering, design studies and permit applications. A prototype version of the hydrogen reactor, supplied by Hazer, is expected to be constructed onsite by YE23. According to Hazer's website, its process allows for the conversion of gas into hydrogen and high-quality graphite using iron ore as a process catalyst.

Multiple other companies have recently announced or are participating in methane pyrolysis pilot projects to produce turquoise hydrogen. In June, SK Group led a \$34 million funding round for a pilot plant being built by C-Zero Inc. Wintershall Dea and VNG AG also announced plans last year to build a similar methane pyrolysis hydrogen pilot.

Tidewater Renewables generating revenue through CFR credits

The publicly traded renewables business of Calgary-based Tidewater Midstream & Infrastructure announced that it will monetize some of its anticipated federal Clean Fuel Regulation credits that it expects to receive from the Canadian government, selling 45,000 at C\$95 each under a multi-year contract. The contract, which Tidewater Renewables Ltd. said is with an "investment-grade company," runs through June 30, 2025.

Tidewater Renewables will receive the CFR credits through the production and sale of fuel at its renewable diesel and renewable hydrogen complex in Prince George, British Columbia, which it expects to enter service in 1Q23. Under Canada's Clean Fuel Regulations, one credit is issued for each metric ton of greenhouse gas emissions saved or eliminated. The company is looking at further opportunities to create revenue streams using CFR credits generated at other projects, including its canola co-processing facility.

"This is Tidewater Renewables' inaugural CFR credit sale, which we believe is the first of its kind in Canada," said executive chairman and CEO Joel MacLeod, adding that the CFR credits will be a meaningful revenue stream for its clean fuel projects. "At similar CFR credit values, Tidewater Renewables' [hydrogen-driven renewable diesel] complex has the potential of generating an incremental C\$30 million of run-rate EBITDA assuming feedstock prices, diesel prices and [British Columbia low-carbon fuel standard] credit prices remain constant."

EU awarding €1.8B in grants to 17 clean energy projects

The European Commission announced July 12 that it will invest more than €1.8 billion (\$1.8 billion) in 17 large-scale clean energy projects through the third round of awards under the EU's Innovation Fund. The grants aim to bring breakthrough technologies to market in energy-intensive industries, hydrogen, renewable energy, CCS infrastructure and manufacturing related to energy storage and renewables. The projects will be in Bulgaria, Finland, France, Germany, Iceland, the Netherlands, Norway, Poland and Sweden.

20 other projects not yet mature enough will be selected for development help in Q4.

Among the 17 projects to be funded were three hydrogen projects in the Netherlands: Shell's Holland Hydrogen, RWE's FUREC and Air Liquide's ELYgator. Additionally, up to 20 projects that are promising but not sufficiently mature for a grant will be pre-selected for development assistance by the European Assistance Bank, the commission said. Those awards will be announced in Q4.

Shell took a positive FID on the first phase of Holland Hydrogen at the beginning of July and expects the project in the Port of Rotterdam to begin commercial operations in 2025. While Shell said Holland Hydrogen I will have 200 MW of electrolyzer capacity producing up to 60 tonnes of green hydrogen per day, the European Commission's description of the full project indicated it could have 400 MW of capacity by 2027.

RWE's FUREC project—or Fuse, Reuse, Recycle—aims to produce hydrogen from waste streams at the Chemelot industrial park in Limburg province. It will transform residual waste into raw material pellets, which will then be converted into hydrogen for use in chemical manufacturing, according to RWE's website. Air Liquide's ELYgator project will be built in Terneuzen with 200 MW of electrolyzer capacity capable of producing 15,500 tonnes of green hydrogen annually.

Executive Summary

The global renewable energy market is experiencing rapid growth, driven by increasing government support, falling costs, and rising public awareness. Key trends include the expansion of solar and wind power, the emergence of green hydrogen, and the integration of digital technologies. The report provides a comprehensive overview of these developments and their implications for the energy sector.

Renewable Energy Investment and Financing

Investment in renewable energy has reached record levels, with significant increases in both public and private funding. This section details the various financing mechanisms, including government grants, venture capital, and green bonds, and discusses the challenges and opportunities in the market.

Renewable Energy Policy and Regulation

Government policies and regulations play a crucial role in the development of the renewable energy sector. This section examines the impact of recent policy changes, such as feed-in tariffs and renewable energy certificates, and discusses the regulatory challenges facing the industry.

Renewable Energy Technology and Innovation

Technological innovation is driving the growth of the renewable energy sector. This section explores the latest developments in solar, wind, and storage technologies, as well as the role of digitalization in optimizing energy production and distribution.

Thank you! We hope you've enjoyed your sample of our Renewables Pulse report.

Enverus is the trusted source for global oil & gas and renewables activity, including asset transactions, corporate acquisitions and mergers, JVs, farm-ins, new technologies and deals in play.

Executive Summary

The global renewable energy market continues to show strong growth, driven by increasing government support and falling costs. Key highlights include significant investments in solar and wind power, particularly in emerging markets. The report details the latest trends and forecasts for the industry.

Key developments in the market include the announcement of new large-scale projects and the signing of major power purchase agreements. The report also covers the latest regulatory changes and their potential impact on the sector.

The report provides a comprehensive overview of the market's performance over the past year, including a detailed analysis of the various renewable energy sources and their respective contributions to the total capacity.

Market Overview

The global renewable energy market is projected to reach a value of \$1.2 trillion by 2025, up from \$0.8 trillion in 2020. This growth is primarily driven by the rapid expansion of solar and wind power, which are expected to account for over 70% of the total capacity added.

Key drivers of this growth include the increasing awareness of climate change, the implementation of net-zero targets by major corporations and governments, and the continued technological innovation and cost reductions in renewable energy technologies.

The report also highlights the challenges facing the industry, such as the need for improved grid infrastructure and the development of new storage technologies to ensure a stable and reliable energy supply. Despite these challenges, the long-term outlook for the renewable energy market remains highly positive.

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ASSET TRANSACTIONS, CORPORATE ACQUISITIONS AND MERGERS, JVs, FARM-INS, NEW TECHNOLOGIES AND DEALS IN PLAY

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Renewables Pulse

Renewables Pulse: Global Renewable Energy Transactions



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Section	Page
Executive Summary	1
Renewables	2
Oil & Gas	3
Coal	4
Nuclear	5
Hydro	6
Geothermal	7
Solar	8
Wind	9
Energy Storage	10
Smart Grid	11
Energy Efficiency	12
Carbon Capture	13
Renewable Fuels	14
Renewable Power	15
Renewable Transport	16
Renewable Buildings	17
Renewable Industry	18
Renewable Finance	19
Renewable Policy	20
Renewable Outlook	21

Section	Page
Renewables	22
Oil & Gas	23
Coal	24
Nuclear	25
Hydro	26
Geothermal	27
Solar	28
Wind	29
Energy Storage	30
Smart Grid	31
Energy Efficiency	32
Carbon Capture	33
Renewable Fuels	34
Renewable Power	35
Renewable Transport	36
Renewable Buildings	37
Renewable Industry	38
Renewable Finance	39
Renewable Policy	40
Renewable Outlook	41

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Renewables Pulse: Global Oil & Gas and Renewables Activity



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Executive Summary

Renewables Pulse is a comprehensive report that provides a detailed overview of the global renewable energy market. It covers key trends, market forecasts, and the latest developments in the industry. The report is designed to help investors, analysts, and industry professionals make informed decisions about the future of renewable energy.

The report is divided into several sections, including an overview of the market, a detailed analysis of the various renewable energy sources, and a look at the challenges and opportunities facing the industry. It also includes a list of key companies and projects that are driving the market forward.

Market Overview

The global renewable energy market is expected to continue its rapid growth over the next several years. This is driven by a combination of factors, including government support, technological advancements, and a growing awareness of the need to reduce carbon emissions.

Key Trends

One of the key trends in the renewable energy market is the increasing focus on solar and wind power. These two sources are expected to account for a significant portion of the new capacity added in the coming years.

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