France Wind Energy Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The French wind energy market is expected to register a CAGR of more than 6% during the forecast period of 2022-2027. The COVID-19 outbreak in Q1 of 2020 had a major impact on energy systems around the country, curbing investments, threatening to slow the expansion of wind energy projects, and further delaying the production and supply of wind turbines and components. Factors such as increasing investments, upcoming and ongoing wind energy projects, and expansion of wind energy capacities are expected to be major drivers for the French wind energy market during the forecast period. However, the widespread electricity generation from alternative renewable energy sources such as hydropower and solar is expected to be a major restraint for the growth of the French wind energy market.

The onshore segment is expected to dominate the market during the forecast period, owing to increasing onshore wind energy installations across the country.

The European Commission has approved financial aid to France with EUR 30.5 billion to support renewable energy production, particularly wind energy. This is expected to create opportunities for the French wind energy market in the coming years.

The increasing adoption of alternative renewable energy sources may restrain the French wind energy market during the forecast period.

France Wind Energy Market Trends

The Onshore Segment is Expected to Dominate the Market

As of 2020, the total wind energy installed capacity came from onshore wind farms. Wind energy production has been growing in France over the past decade. France's wind energy sector is the second-largest renewable energy source after hydropower.

In 2020, the installed capacity of onshore wind energy in France accounted for more than 17.4 GW, compared to 16.4 MW in 2019. Onshore wind energy increased by 6.1% as compared to 2019. The total wind energy provided about 31.4% share of France's renewable mix in 2020.

According to the National Climate and Energy Plan, France aims to install up to 35 GW of onshore wind by 2028, up from 17 GW, as of 2020. This is expected to increase the use of onshore wind energy during the forecast period.

In February 2021, France awarded 520 MW of projects in the latest round of its tender program for onshore wind projects. A total of 15 projects were announced to be on the winning list released by the French Ministry for the Ecological Transition. The government received 49 applications with a combined capacity of 1,065 MW against a target volume of 500 MW.

Additionally, in October 2021, RWE commissioned the Les Pierrots onshore wind farm in France with a total installed capacity of 26.4 megawatts (MW) and a total investment of EUR 33 million. The project comprises 11 Nordex turbines (type N117 2400 TS98), and the wind farm could produce enough to supply electricity to over 15,000 French households.

Therefore, forthcoming and ongoing onshore wind energy projects are expected to dominate the French wind energy market during the forecast period.

Increasing Adoption of Alternative Renewable Energy Sources is Restraining the Market Growth

France's renewable energy mix is dominated by wind and hydropower power. But this scenario has begun changing fast with the growth of solar energy and bioenergy.

Solar energy has been growing significantly in France in recent years. The country's solar potential is widespread throughout the country. The solar power capacity is set to continue expanding with a target of around 18-20 GW installed by 2023.

Solar energy capacity in the country increased from 3,004 MW in 2011 to 11,733 MW in 2020. France accounts for 21.2% of solar energy from the total renewable energy mix.

Bioenergy capacity in the country increased from 966 MW in 2011 to 1,851 MW in 2020. France accounts for 0.6% of bioenergy from the total renewable energy mix.

In December 2020, Albioma SA received clearance to convert to a 100% biomass plant at its 108-MW Bois-Rouge coal-fired power plant on Reunion Island. The conversion will make the share of renewable sources from 35% to 51% in Reunion Island's energy mix.

In January 2021, Voltalia SA commenced operations on a 5.1 MW biomass plant in French Guiana. The biomass plant will use locally sourced wood waste as fuel, and it is expected to save around 28,500 ton of carbon dioxide (CO_2) emissions annually. The forthcoming bioenergy projects are expected to hinder the wind energy market during the forecast period.

In November 2021, TotalEnergies launched its largest photovoltaic solar power plant in France, with a capacity of 55 megawatts (MW). The solar farm is located northeast of Gien (Loiret), comprising 126,000 photovoltaic panels spread over 75 hectares. The plant will produce around 64 GWh per year, equivalent to the annual electricity consumption of 38,000 people.

In February 2022, the French government planned to have more than 100GW of installed solar PV capacity by 2050. The following key developments are expected to restrain the wind energy market in the country.

Therefore, the adoption of alternative renewable energy sources in the country has been growing faster during the last decade, and it is expected to restrain the French wind market during the forecast period.

France Wind Energy Market Competitor Analysis

The French wind energy market is moderately consolidated. The key players in the market include Engie SA, EDF Renewables, Vestas Wind Systems AS, General Electric Company, and Siemens Gamesa Renewable Energy SA, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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