

Netherlands Solar Energy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 95 pages | Mordor Intelligence

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Report description:

Netherlands Solar Energy Market Analysis

The Netherlands Solar Energy Market size in 2026 is estimated at 36.7 gigawatt, growing from 2025 value of 33.27 gigawatt with 2031 projections showing 59.95 gigawatt, growing at 10.32% CAGR over 2026-2031.

Strong policy mandates, a sustained decline in the levelized cost of electricity, and a pre-deadline rush ahead of the 2027 net-metering phase-out are reinforcing growth momentum. Corporate power-purchase agreements (PPAs) from data-center and retail giants are broadening demand beyond the residential segment, while agrivoltaic incentives are unlocking dual-use land opportunities. At the same time, developers are investing in hybrid solar-plus-storage designs to navigate curtailment risk and secure premium evening-hour revenues. Grid upgrades announced by TenneT, coupled with the EU Fit-for-55 framework, position the Netherlands' solar energy market as a resilient growth story through 2030.

Netherlands Solar Energy Market Trends and Insights

EU Fit-for-55 Targets Accelerate PV Roll-Out

The EU requirement to source 39% of final energy from renewables by 2030 translates into roughly 70 TWh of additional clean electricity for the Netherlands. Utility-scale solar currently offers the lowest delivered power cost, with 2024 projects achieving EUR 0.03-0.04 per kWh amid a 35% slide in module prices. The SDE++ program set aside EUR 11.5 billion in 2024 to close the

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wholesale-versus-renewable cost gap, yet auction volumes missed the 5 GW target by 18% because grid connections, not capital, remain the bottleneck. Developers are therefore pairing photovoltaics with one- to two-hour batteries, allowing stored midday output to meet evening peaks and satisfy guarantees of origin demanded under Renewable Energy Directive II.

Phase-Out of Net-Metering After 2025 Spurs Pre-Cut-Off Rush

Retail prosumers can currently offset electricity imports at retail rates; however, the scheme ends on January 1, 2027, when exports will earn only the wholesale price minus grid fees. The change extends residential payback from seven to roughly eleven years, prompting a wave of orders through 2025. Installers report full calendars into Q3 2025, while household battery-attachment rates reached 22% in 2024, nearly triple the 2023 level. Demand beyond 2027 is uncertain, implying that corporate and utility buyers, not homeowners, will dominate the Netherlands solar energy market thereafter.

Severe Grid Congestion in Noord-Brabant and Limburg

TenneT classifies both provinces as critical congestion zones, with a connection backlog topping 8 GW, three times the upgrade pipeline through 2027. Curtailment trims effective capacity factors to below 10%, forcing developers to install batteries that add EUR 0.15-0.20 per watt in capex. A proposed congestion-management scheme that would pay curtailed generators 90% of day-ahead prices remains under regulatory review, leaving near-term revenue uncertainty.

Other drivers and restraints analyzed in the detailed report include:

Corporate PPAs from Data-Center and Retail Giants
Declining LCoE Below EUR 0.04/kWh
Land-Use Opposition in Natura 2000 Areas

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Photovoltaics owned 100.00% of the Netherlands' solar energy market share in 2025, and the segment is forecast to post a 10.32% CAGR through 2031. Concentrated solar power remains absent due to sub-optimal direct normal irradiance of 1,000-1,100 kWh/m². Bifacial modules captured 40% of 2024 utility builds, and tandem perovskite-silicon prototypes reached 29% efficiency in domestic pilot lines run by the Solliance consortium.

Advances in tandem cells may shorten residential payback to under nine years once commercial releases start in 2026. Agrivoltaic roll-outs, supported by a EUR 200 million SDE++ envelope, use elevated racking that maintains farm output while tapping solar revenues, reinforcing land-use compatibility and sustaining the Netherlands solar energy market.

The Netherlands Solar Energy Market Report is Segmented by Technology (Solar Photovoltaic and Concentrated Solar Power), Grid Type (On-Grid and Off-Grid), and End-User (Utility-Scale, Commercial and Industrial, and Residential). The Market Sizes and Forecasts are Provided in Terms of Installed Capacity (GW).

List of Companies Covered in this Report:

Vattenfall AB Shell plc (Renewables) Eneco Groep N.V. BayWa r.e. AG Chint Solar Netherlands B.V. GroenLeven B.V. Sunrock Investment B.V. Statkraft (Netherlands) ENGIE Nederland N.V. Solarfields Nederland B.V. AB Solar Total B.V. DMEGC Solar Energy TenneT Holding B.V. Canadian Solar Inc. First Solar Inc. Trina Solar Co. Ltd. JinkoSolar Holding Co. Ltd. LONGi Green Energy Hanwha Q-Cells GoodWe Europe GmbH SMA Solar Technology AG

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Additional Benefits:

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

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