

Huawei solar Mandatory Energy Storage Policy

How will the energy storage mandate impact China?

S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand. With China accounting for around 56% of the global energy storage demand in 2024, the impact of such a policy change will be massive.

Is the energy storage mandate a big change?

This is a big change towards rationalization of renewables but hidden within that is a removal of the energy storage mandate," George Hilton, research and analysis manager at S&P Global, tells ESS News. S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand.

How will China's energy storage policy affect global demand?

"China was on-track to install over 60% of all utility scale storage globally in 2025 and so in the absence of further policy changes, about 45% of global demand has just been wiped away," Hilton says. The ripple effect on the global demand-supply balance will involve further downward pressure on energy storage prices.

What is China's new energy policy?

Hereafter referred to as the Notice, or as Document 136, this policy not only signals a shift in China's new energy generation model--from reliance on fixed tariffs, subsidies, and guaranteed procurement toward market-based competition--but also presents both new opportunities and significant challenges for the country's energy storage market.

How will China's energy storage policy change in 2025?

The current Notice sets the framework for energy storage policy, while detailed rules will be made by each Chinese province based on local conditions by the end of 2025. This transition period may cause short-term market fluctuations, so industry players should stay flexible and prepared.

Will China's new energy storage installations reach 112 Gwh in 2025?

Based on current energy storage market and the Notice, InfoLink expects China's new energy storage installations to reach 112 GWh in 2025, up 9% YoY. But if local policies or incentives (e.g., capacity pricing or compensation for grid services) fall short, the industry may face some challenges in 2026-2027.

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