

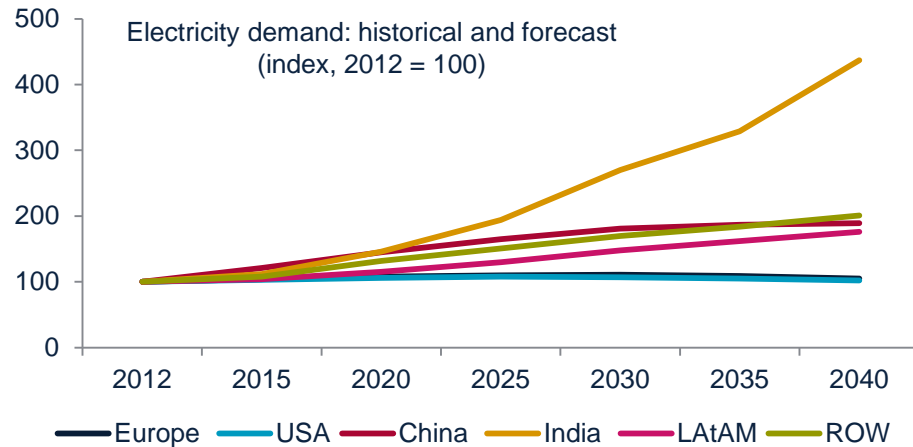


RENEWABLE ENERGY: A POTENTIAL GROWTH STORY

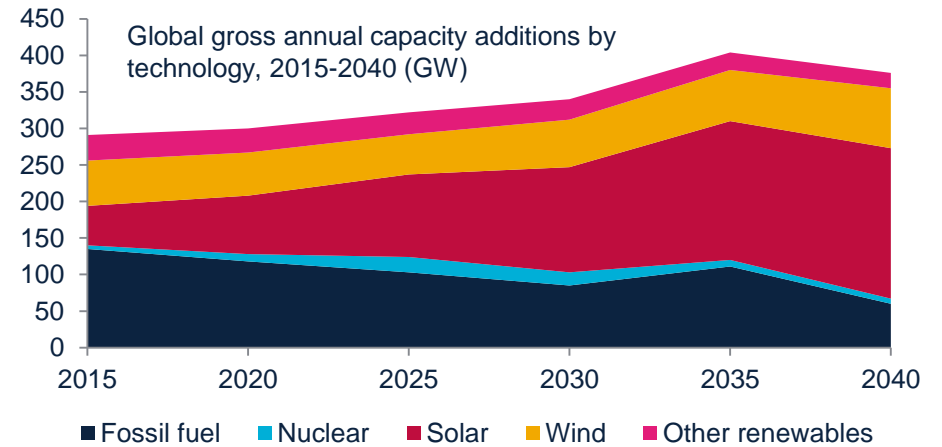
RENEWABLES TO COMMAND JUST UNDER 60% OF THE NEW GENERATING CAPACITY AND TWO-THIRDS OF THE \$12.2 TRILLION OF INVESTMENT BY 2040



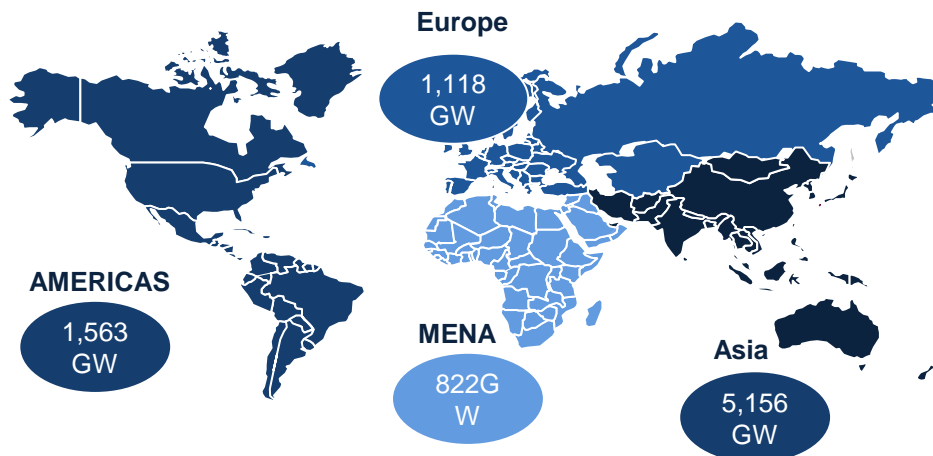
By 2040 demand for power to shift to developing countries due to fast growing economies and rising populations



To satisfy rising global demand, \$12.2 tr. will be invested in power plants by 2040



Asia to witness the bulk of the \$12 tr. investments - the region to add more capacity till 2040 than the rest of world combined



Major investment focus areas

- **66%** of \$12.2 tr. to be invested in renewable energy projects
- **Wind and solar** to be the most invested segments in the renewable space
 - **\$2.4 tr.** and **\$464 bn** to be invested in onshore and offshore wind projects, respectively
 - **\$1.5 tr.** to be invested into large-scale photovoltaic projects
 - small-scale photovoltaics installation to attract **\$2.2 tr.**
- Hydro power to attract over **\$1.1 tr.** Worth of investments by 2040

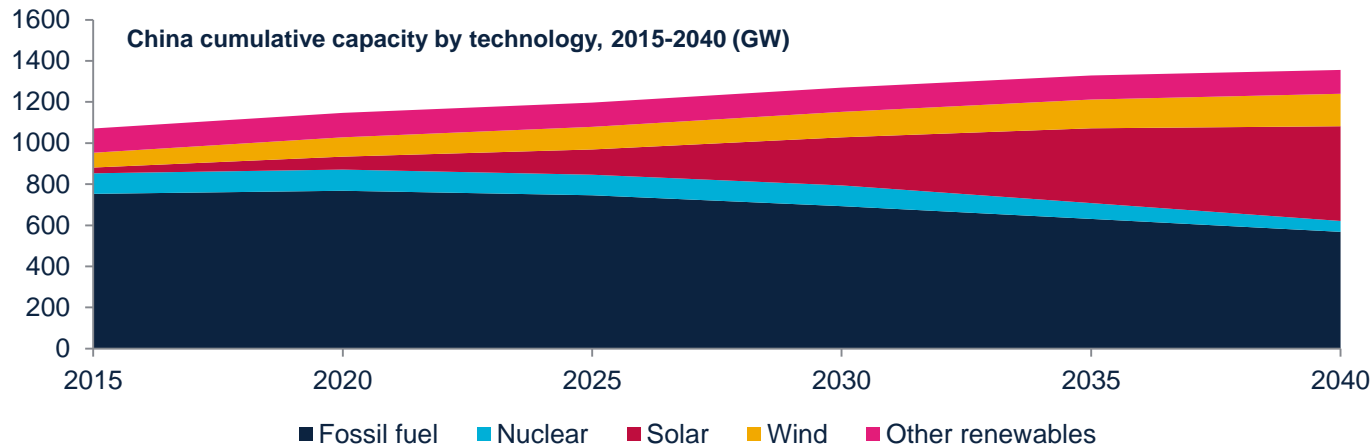


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CHINA EXPECTED TO LEAD THE WORLD IN RENEWABLE ENERGY INVESTMENTS

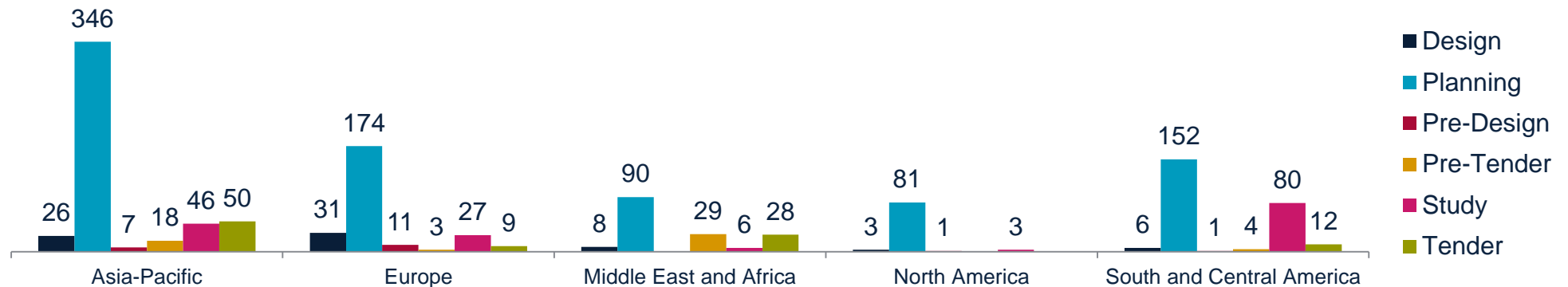


China to attract nearly 50% (~\$5 tr.) of the Asian investments - 70% of the capacity additions to be in renewable energy segment



Pollution regulations and national carbon price will make coal more expensive against solar PV and onshore wind – thus leading to higher adoption of the renewable power in China

Current opportunity pipeline in the renewable energy space globally



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