

The mandatory use of energy storage for new energy sources has been halted

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Title: The mandatory use of energy storage for new energy sources has been halted

Generated on: 2026-10-09 15:53:33

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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 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.

Will this notice impact energy storage demand in the short term?

This Notice may impact energy storage demand in the short term. Up until 2024, mandatory storage allocation policies were always the primary driver of China's energy storage market. In 2024, for instance, energy storage installations tied to new energy projects accounted for nearly 40% of total capacity.

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.

Why the 2025 Policy Overhaul Changes Everything for Renewable Energy You know how people kept arguing about whether mandatory energy storage requirements were helping or hurting the industry? ...

Collectively, these concerns led to a change of policy in February 2025, when the mandate was retired. A September 2025 national action plan, however, has set the 2027 target for new energy ...

Previously, in February 2025, the National Development and Reform Commission (NDRC) and the National Energy Administration (NEA) issued Document No. 136, explicitly stating ...

After the cancellation of mandatory energy storage requirements under "Document No. 136," how will new energy and energy storage achieve coordinated development? How will the value ...

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The policy adjustment of Document No. 136 marks the official exit of the administrative storage mechanism that has lasted for nearly 8 years, and the energy storage industry has entered a ...

China's new energy industry has ushered in an unprecedented "policy storm," which has also accelerated the transformation of the energy storage industry from "policy-driven" to "market ...

On February 9, China's National Development and Reform Commission (NDRC) and National Energy Agency (NEA) jointly published the Notice on Deepening Market-Based Reform of ...

In a major policy shift towards electricity market liberalization, China has introduced contract for difference (CfD) auctions for renewable energy plants and removed the energy storage ...

At present, the domestic energy storage market is mainly dominated by distribution and storage demand, and the release of the new policy for new energy power generation to enter the ...

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