

Consolidation in renewables offers opportunities

Düsseldorf, 05. March 2025 - The hype is followed by a hangover: the market for renewable energy project developers is consolidating. Some smaller or overly specialised providers are experiencing difficulties, and many partially developed projects are currently up for sale. "Those who can act as buyers now and possess expertise across the entire value chain will benefit from the situation", says Patrick Lemcke-Braselmann, Co-CEO of aream Group SE.

In the wake of the energy transition and the European Green Deal, many new providers have entered the renewable energy market. "Some with a great deal of idealism, but limited financial strength and expertise", says Lemcke-Braselmann. "Not all of them can cope when projects are delayed, new requirements arise or financing costs increase." Many are only now realising that market conditions demand resilience. As a result, numerous small and medium-sized companies are offering their projects or portfolios for sale. "Project development in the renewable energy sector often takes longer than originally planned and the revenue potential for partially developed projects has deteriorated noticeably", says Lemcke-Braselmann.

At the same time, demand remains high for projects that are ready to build – such as PV systems or large-scale storage systems, where securing the grid connection is the biggest challenge. Projects allowing co-location, i.e. the installation of solar modules and storage systems at a single site with a shared grid connection, are becoming increasingly popular. "Such projects are attractive for developers because storage revenues often follow a counter-cyclical pattern to revenues from electricity generation", says Lemcke-Braselmann. Additionally, with a single grid connection, the costs are lower.

Despite these challenges, the current development is favourable for all market participants who can respond flexibly. "If you have the resources to act as a buyer now and invest specifically in project rights, this situation presents a strong opportunity", says Lemcke-Braselmann. This requires broad expertise in the areas of photovoltaics and electricity storage, onshore wind projects and electricity marketing. At the same time, smaller project developers have the chance to sell their portfolio to strategic partners at fair prices. "At aream, we cover the entire value chain and are well positioned to expand our contribution to the energy transition in Germany", says Lemcke-Braselmann.

About the aream Group

aream Group, founded in 2005, is an investment and asset manager for institutional investors and industrial clients with a focus on sustainable infrastructure in the renewable energy sector. With its three divisions Fund and Asset Management, Project Development and Operation Management, aream covers the entire value chain for renewable energy investments. With a transaction volume of more than 2.5 billion euros, aream is one of the leading asset managers in this market, and its own portfolio of plants generates around 40 million euros worth of green electricity per year. Since 2008, aream has produced more than one billion kWh of green electricity. As part of the growth strategy, several solar and wind parks are to be realized or acquired in the coming years. Through its own project development alone, aream currently has a long development pipeline with great potential. Further information: www.arem.de.



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