

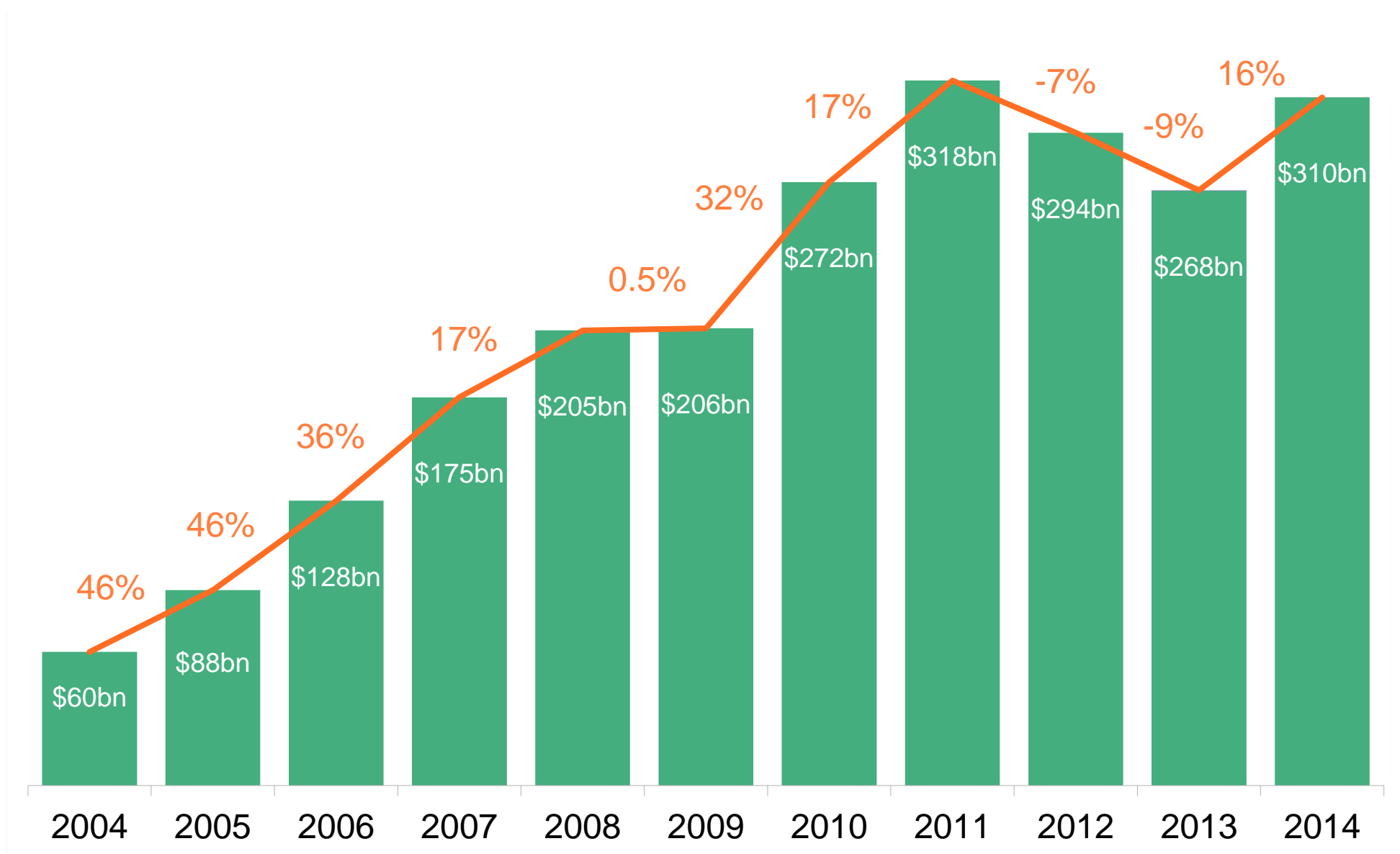
Colloque AQPER - 11 Mars 2015

# TENDANCES GLOBALES DU SECTEUR DES ENERGIES RENOUVELABLES

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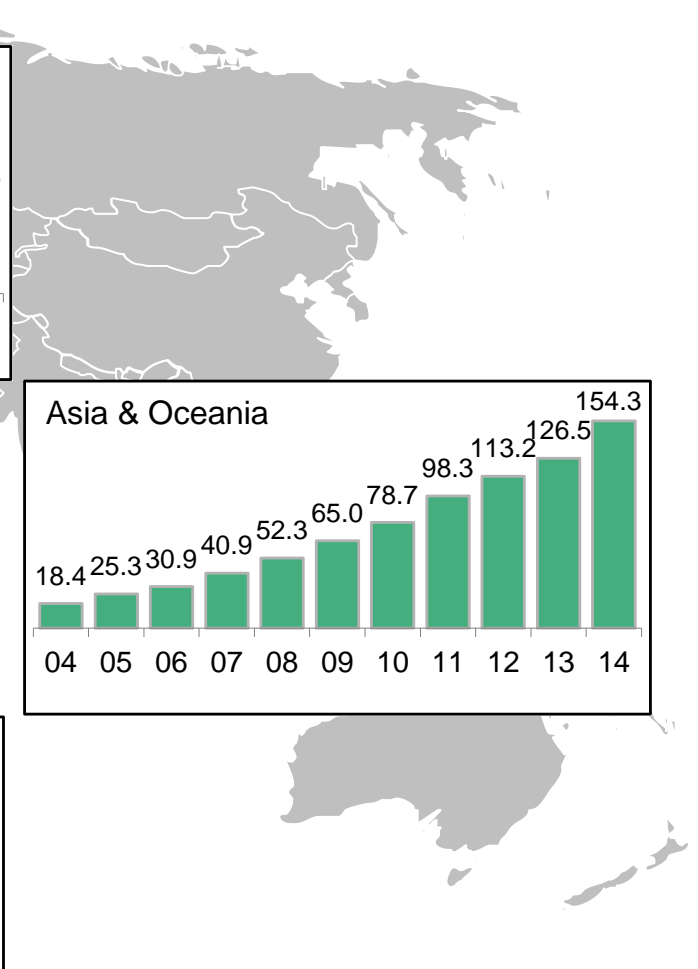
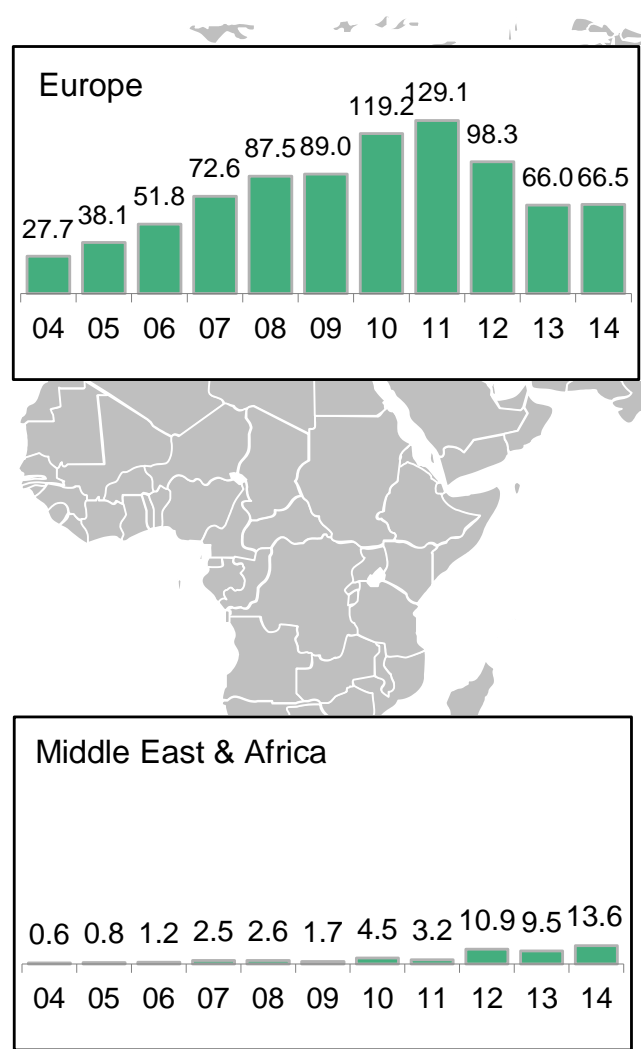
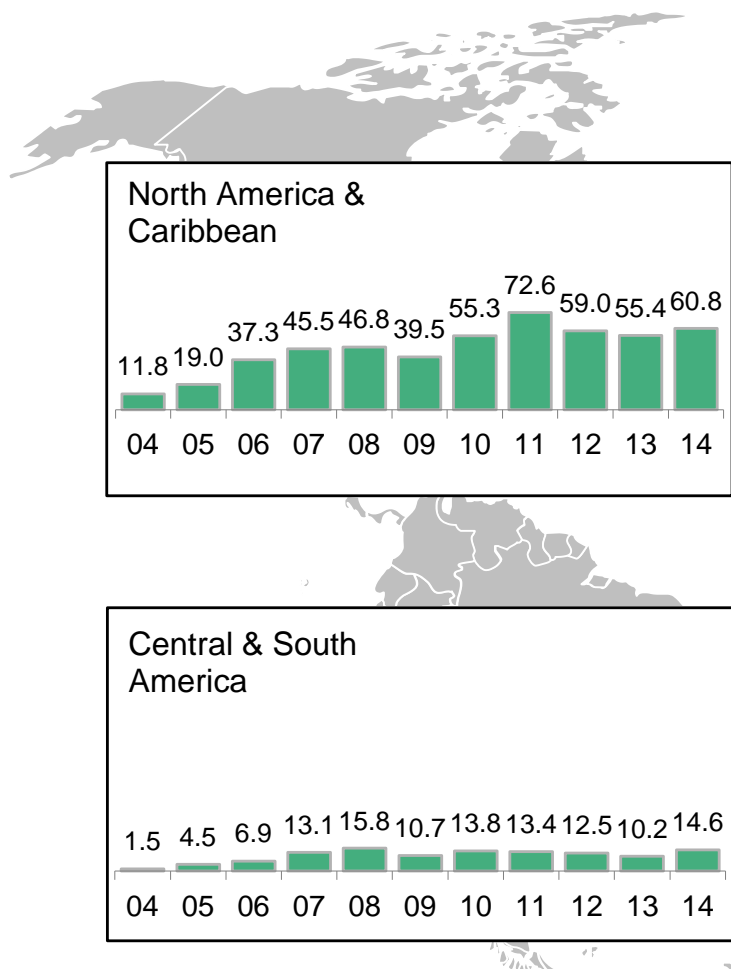
# INVESTISSEMENTS ENERGIES RENOUVELABLES, 2004-14 (\$BN)



Note: Total values include estimates for undisclosed deals. Includes corporate and government R&D, and spending for digital energy and energy storage projects (not reported in quarterly statistics).

Source: Bloomberg New Energy Finance

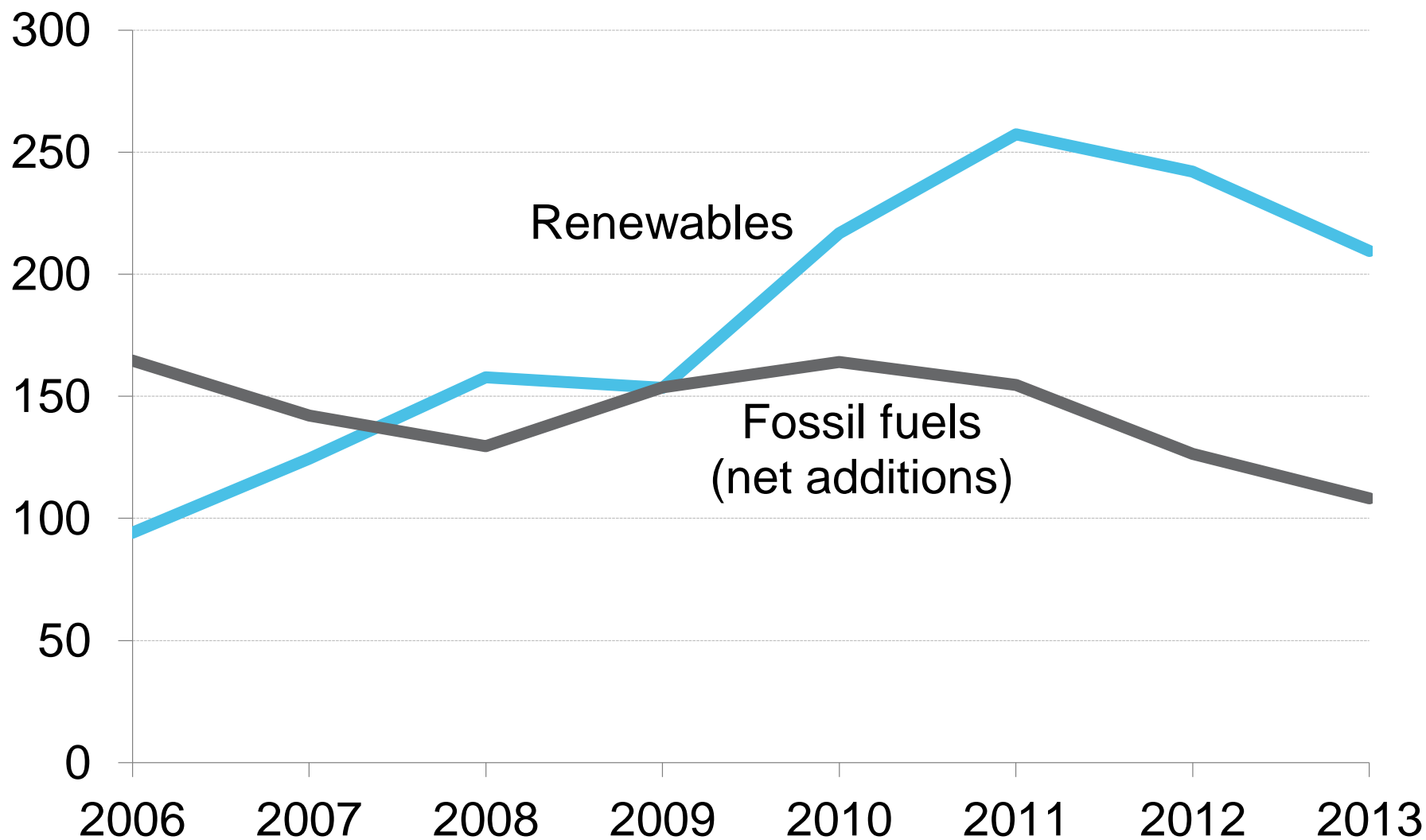
# INVESTISSEMENTS ENERGIES RENOUVELABLES, 2004-14 (\$BN)



Note: Does not include carbon capture and storage

Source: BNEF

# INVESTISSEMENTS EN ENERGIES FOSSILES VS RENOUEVELABLES (EXCL GRAND HYDRO), 2006–13

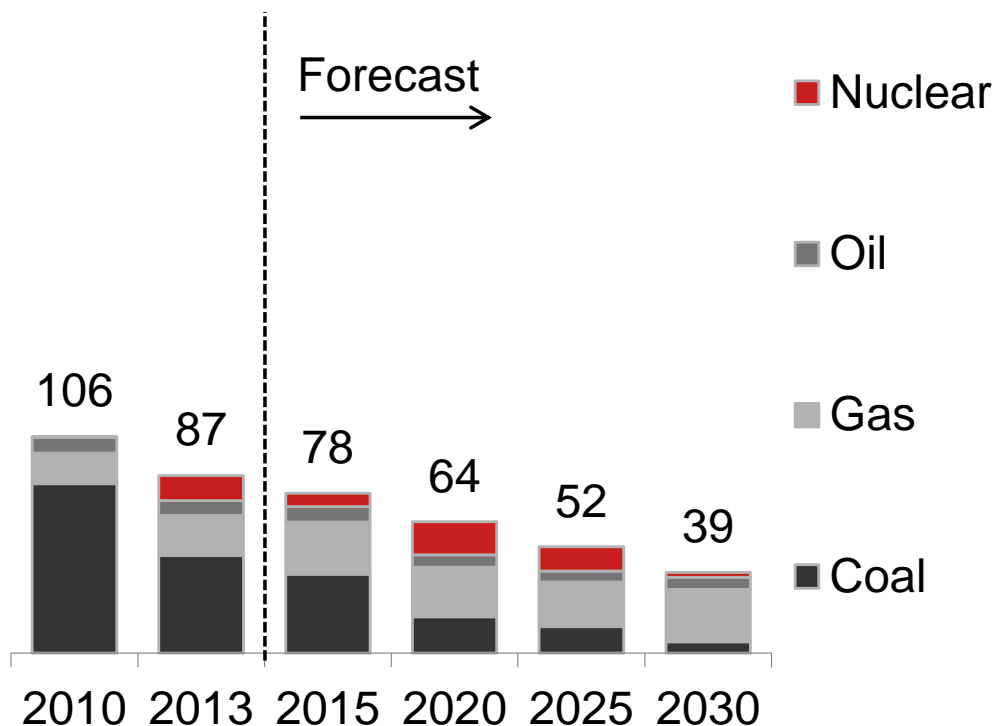


Note: Fossil fuel total comprises coal, oil and gas. Fossil fuel (net additions) is investment in net new capacity (ie, investment that applies to net growth in fossil capacity and excluding capacity built to replace retiring plants). Renewable energy excludes large hydro (>50MW) investment. All investment is nominal.

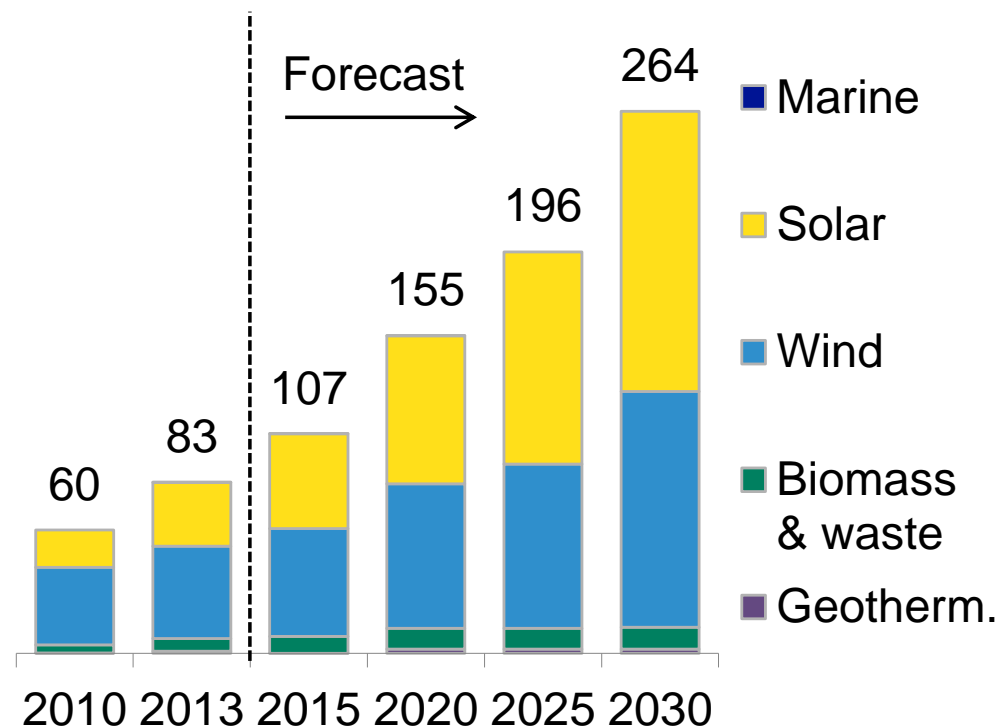
Source: Bloomberg New Energy Finance, US Energy Information Administration

# AJOUT CAPACITE ENERGIES FOSSILES VS RENEUVABLES 2010-30 (GW)

## FOSSIL FUEL AND NUCLEAR

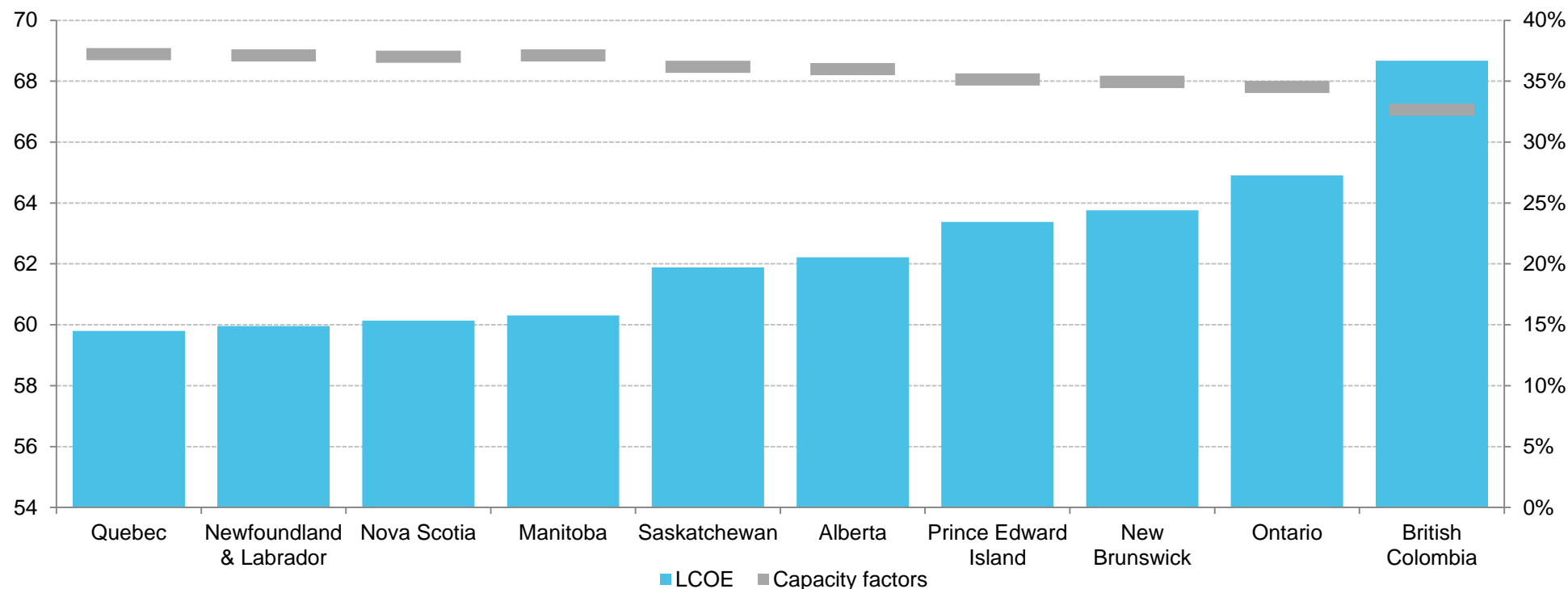


## RENEWABLES



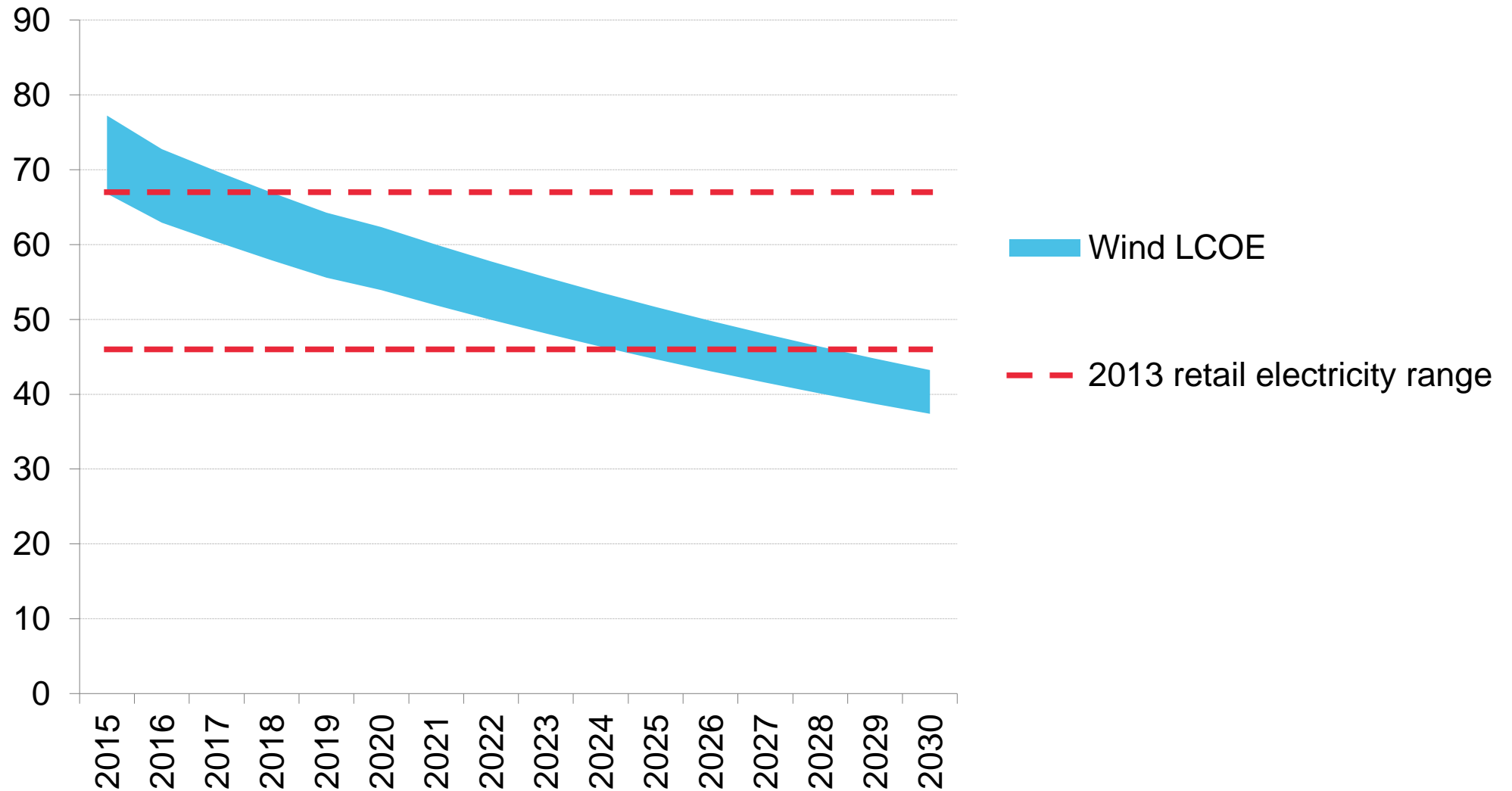
Source: Bloomberg New Energy Finance

# H1 2015 LCOE (\$/MWh) – CANADA – PAR PROVINCE EOLIEN ONSHORE



- Canadian wind LCOEs are in the range of \$67-77/MWh
- Cheaper wind is found in Quebec (\$67/MWh) and the most expensive wind is in British Columbia (\$77/MWh)
- Capacity factors are in the range of 31-36% and capex is near the middle of the global average at around \$1.7- \$2/W

Source: Bloomberg New Energy Finance.



Source: Bloomberg New Energy Finance.

## **MARKETS**

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