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Clean power cushions Europe from gas shock, while low wind and hydro expose flexibility gap

Discover power sector trends from the first half of 2026, powered by ELDA, Eurelectric's electricity data assistant.

BRUSSELS, BELGIUM, July 1, 2026 /EINPresswire.com/ -- A mid-year analysis from Eurelectric's revamped electricity data platform shows that record clean power generation helped shield Europe from a sharp gas-price shock in early 2026. However, higher prices outside solar hours exposed the urgent need for more storage, grids and other flexible low-carbon capacity.

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>
> *Kristian Ruby, Secretary General of Eurelectric*

Following the outbreak of the US–Iran war, Title Transfer Facility (TTF) gas prices rose by 60% between February and March. Yet, over the same period, the EU average day-ahead electricity price fell by 9%, thanks to seasonal factors such as lower demand and stronger spring renewable output. This contrast shows that the gas shock did not dictate power prices in the way it would have in a more fossil-fuel-dependent system. Strong clean power generation, particularly solar, helped limit the pass-through of higher gas costs to electricity consumers.

"Data trends from the first half of 2026 reveal what we've been long advocating for: replacing imported fossil fuels with home-grown clean and renewable electricity means an energy independent Europe less exposed to crises", said Kristian Ruby, Secretary General of Eurelectric.

Solar played a central role in this resilience. In May, it became the EU27's largest source of electricity generation, accounting for 22.57% of the generation mix. Solar output reached a new monthly record of 48 TWh - almost equivalent to Hungary's annual electricity demand. This record generation helped moderate daytime prices and reduce the need for gas-fired generation when solar output was available.

Yet the experience of May and June also exposed a key vulnerability in Europe's power system. While clean power helped limit exposure to the fossil fuel shock, electricity prices still rose in several parts of Europe when weather-dependent generation and other low-carbon capacity were less available. Below-average wind and hydro output, together with nuclear maintenance outages in some countries, increased reliance on more expensive fossil-based generation during periods when solar output was low.

This trend was particularly evident outside solar hours. During May and June 2026, the average hourly electricity price across the EU27 before 09:00 and after 18:00 reached €122/MWh, compared with €90/MWh during the same period in 2025. By contrast, daytime prices remained significantly lower, averaging around €56/MWh. While average gas-fired generation increased by just 1% during sunny hours, it increased by 15% outside them. This growing divergence between solar and non-solar periods highlights Europe's flexibility gap. When solar output declines, the system still relies too heavily on more expensive generation because storage, demand response, interconnection and other flexible low-carbon resources are not yet available at sufficient scale to smooth daily fluctuations.

The Nordic countries provide a particularly striking example of how weather-dependent generation and limited flexibility can affect prices. Across the whole first half of 2026, their electricity prices were higher than in the first half of 2025, driven mainly by lower hydro availability, weaker wind output and reduced nuclear generation during maintenance.

"The challenge now lies in flexibility. Even as Europe becomes less exposed to fossil fuel shocks, its power system remains vulnerable when weather conditions are unfavourable and flexible low-carbon capacity is insufficient" commented Ruby.

Belgium provides a clear example of how flexibility can strengthen security of supply. With its entire nuclear fleet remaining unavailable from 4 April through the end of June due to maintenance, Belgian electricity generation fell by 23% year on year over the April-June period. Yet demand increased by 7%, while net imports increased by 150%. Cross-border interconnections therefore acted as a crucial source of flexibility, allowing Belgium to draw on regional generation and maintain security of supply despite a major loss of domestic capacity.

"Europe needs more flexibility to translate this resilience into stable prices throughout the day and across all seasons. Investment in grids, storage, demand response, and other low-carbon flexible capacity will be essential to manage periods of low wind, hydro or solar availability, strengthen security of supply and keep electricity prices under control" Ruby concluded.

The data comes from Eurelectric's pan-european electricity data platform ELDA. The tool provides access to key parameters of Europe's power sector like electricity generation, demand, wholesale prices. Launched in 2023, the platform has been recently revamped and now provides retail gas and electricity price data, supported by detailed visualisations across Europe. A newly launched chatbot service also helps users navigate ELDA more easily and find the data they need more efficiently.

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Note to Editors:
Eurelectric represents the common interests of the European electricity industry. Speaking for more than 3,500 electricity companies, we seek to promote the role of electricity in the advancement of society.

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