

Enerdatics Releases H1 2026 Renewables M&A Outlook, Tracking \$64B of Global Deal Value

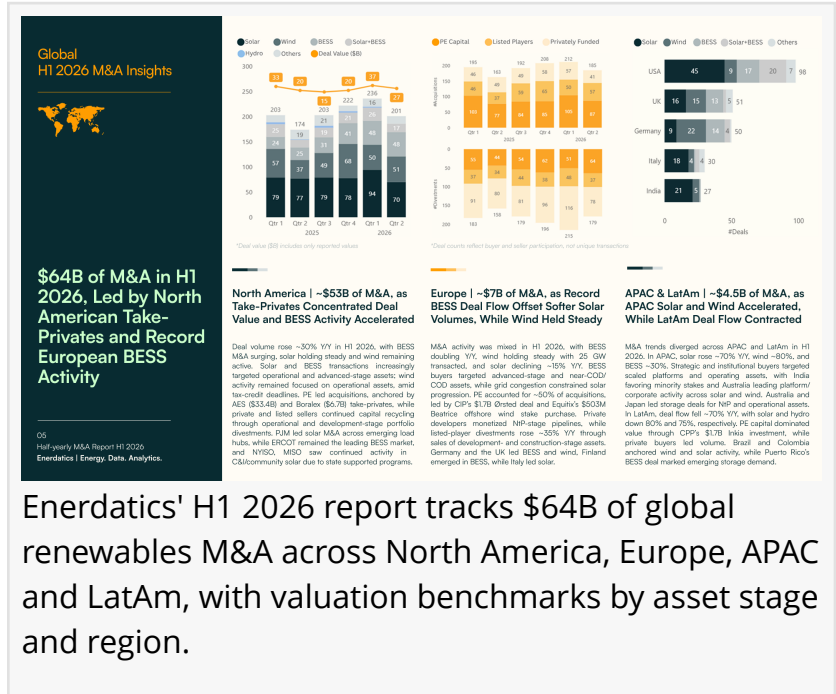
Enerdatics' H1 2026 report tracks \$64B of renewables M&A across four regions, with per-MW valuation benchmarks and a market-by-market outlook for H2.

HOUSTON, TX, UNITED STATES, August 25, 2026 /EINPresswire.com/ -- Enerdatics has released [Renewables M&A Outlook & Analysis H1 2026](#), a global review of renewable energy transactions in the first half of the year and an outlook for the second. To request a copy, contact Ryan Nickerson at ryan@enerdatics.com.

Disclosed global deal value reached \$64B in H1 2026, up 20 percent year on year from \$53B in H1 2025. North America contributed roughly 85 percent of that value, driven by private equity-led take-privates, while European battery storage activity doubled.

One pattern held across every region. Around 80 percent of deal volume targeted advanced-stage, near-COD and operating assets, as buyers paid for execution certainty and revenue visibility rather than pipeline size.

“Four regions, four different policy regimes, and one pattern running through all of them. Roughly 80 percent of deal volume went to assets where execution risk was already resolved.”
Mohit Kaul, Founder and CEO



Three corporate transactions drove more than 75 percent of tracked deal value: GIP and EQT's \$33.4B take-private of AES, Brookfield and La Caisse's \$6.7B acquisition of Boralex, and KKR's \$5.5B purchase of EDF's North American renewables business. NextEra's proposed merger with Dominion would extend the pattern further.

The two largest US power markets diverged by technology. PJM became the most active solar M&A market, with deal count rising fourfold year on year to 16 and 2.6 GW transacted, clustered around emerging data-center load hubs in Central Ohio, Dayton, Northern Illinois and Pennsylvania. ERCOT remained the leading BESS market, with around 1 GW across eight deals.

Appetite for long-dated development has not disappeared despite weaker tax-credit economics. Seven early-stage utility-scale solar acquisitions totaling 2.4 GW were announced in H1 2026, against two in H1 2025, with Shell, AEP and EGH among the buyers and target CODs in 2028 to 2030.

European Storage Doubled While Solar Softened

European BESS deal activity grew twofold year on year to a record 69 deals and 18 GW of transacted capacity, led by Finland, Germany and the UK. Wind held steady at around 25 GW transacted. Solar fell approximately 15 percent, with advanced-stage deals down 30 percent as grid congestion delayed project readiness.

Private equity led roughly half of European acquisitions, headlined by CIP's \$1.7B takeover of Ørsted's European onshore platform and Equitix's \$503M entry into the Beatrice offshore wind farm.

Listed renewable funds are emerging as a significant sell-side channel. Persistent NAV discounts of 25 to 40 percent are pushing boards toward take-privates, asset sales and wind-downs, with NextEnergy Solar's sale process, Gore Street's September AGM and TRIG's planned £300M of disposals all identified as H2 catalysts.

APAC Accelerated as LatAm Contracted

APAC solar M&A rose approximately 70 percent year on year, wind 80 percent and BESS 30 percent, led by India and Australia. India recorded 21 solar deals and 3.5 GW transacted, while seven of Australia's eight solar transactions involved co-located storage.

LatAm moved the other way, with deal flow down roughly 70 percent year on year. CPP's \$1.7B investment in Peru-based Inkia anchored regional value, while early BESS activity in Puerto Rico signalled emerging storage demand.

Valuation Benchmarks by Stage and Region

The report sets out per-MW benchmarks drawn from closed transactions and primary research, covering both developer premiums for development-stage assets and enterprise valuations for operating and in-construction assets.

In the US, NYISO solar reached around \$200K/MW at ready-to-build, supported by NYSERDA Tier 1 REC agreements, while ERCOT solar and BESS traded in the \$30K to \$75K/MW range. In Europe, ready-to-build BESS premiums reached €145K/MW in Germany, and CfD-backed solar in Portugal reached €210K/MW.

What Enerdatix Expects in H2 2026

The report's outlook is market-specific rather than directional. In North America, the July 4 BOC deadline has weakened tax-credit economics without removing the investment case for later-dated projects, as data-center and industrial load growth makes access to power more valuable than federal incentives. Buyers are expected to weight FEOC compliance, supply-chain traceability, secured interconnection and offtake certainty more heavily.

Storage carries a specific risk the report quantifies. Enerdatix research shows ERCOT BESS revenues fell 37 percent in 2025 as milder scarcity and rapid capacity additions compressed ancillary-service and arbitrage margins, which is expected to push buyers toward contracted assets and projects with 12 to 24 month paths to COD.

In Europe, Germany's EEG 2027 changes and the UK's AR8 and Gate 2 requirements are expected to increase the value of de-risked projects, with Italy, Poland and Finland forming a second tier for BESS. In APAC, India's 42 GW of awarded capacity lacking signed offtake is expected to drive pipeline rationalisation, while Australia's final Capacity Investment Scheme rounds support contracted storage.

The report also carries commentary from industry executives at Camelot Energy Group, reconcept Canada and nTeaser on how underwriting standards are shifting in their markets.

Now Available Through [Leap](#)

The report's underlying dataset is also live inside Enerdatix Leap, the company's AI native deal intelligence platform. Users can query the findings directly in natural language and run comparable screens against their own markets and asset classes.

Request the Report

Renewables M&A Outlook & Analysis H1 2026 is available on request at no cost. It includes the valuation benchmark tables, the top five transactions in each region, and the H2 outlook for North America, Europe, APAC and LatAm.

To request a copy, or to discuss what the data shows for a specific market or asset class, contact Ryan Nickerson at ryan@enerdatix.com.

To learn more or request a demo of Enerdatix Leap, visit www.enerdatix.com

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