BEYOND FOSSIL FUELS

Q1 2026 report on coal, fossil gas and European power trends

April 2026

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Key facts of Q1 2026: Renewable energy helped reduce the use of fossil fuels, in a context of high gas prices

Gas

Despite a cold January that drove gas generation up, the **good performance of renewable sources helped reduce Europe's gas generation by -6%** year-on-year over the quarter.
The war in the Middle East and the closure of the Strait of Hormuz, caused **Europe gas prices to surge by over 50% in March, as analysed by** Ember. The impact on **electricity prices varies greatly depending on the countries' gas reliance**, with for instance Italy being one of the exposed countries due to its massive gas fleet.

Coal

In Q1 2026, **coal power generation in Europe fell by -9 TWh** (-8% y-o-y), mainly thanks to **improved wind and hydro generation** after a weak Q1 2025.
Even though the ongoing **energy crisis** with rising gas prices is making coal generation more cost-competitive than gas generation, there is no evidence of a clear gas to coal switch, as highlighted by CREA. However, governments are using this narrative to justify delays in coal plant closures. Notably, **Italy** has **delayed its coal phase-out from 2025 to 2038.**

Demand

European electricity demand **continued a modest upward** trend in Q1 2026 (+15 TWh, +1.6% y-o-y). Cold weather in January and structural factors like electrification and industrial activity drove the demand up, while February and March showed more mixed or slightly lower demand due to milder conditions. The **Middle East energy crisis does not seem to significantly impact overall demand trend** yet.

Wind

After a weak Q1 2025 due to poor wind conditions and dunkelflaute, **wind generation in Europe returned to normal in Q1 2026**, rising 18% year-on-year (+31 TWh). Yet, it is only 1.6% above Q1 2024 levels, **highlighting stagnant capacity growth**. Türkiye stood out with a record 13 TWh (+42% y-o-y), driven by its rapid expansion as Europe's second-largest wind market in 2025.

The war in Iran and the closure of the Strait of Hormuz have plunged Europe into yet another energy crisis, exposing once more its **structural dependency on fossil fuels**.

The scenario is all too familiar: as gas prices were pushed to their highest levels in at least a year, electricity costs spiked sharply in countries that largely rely on gas for their electricity, such as Italy and Ireland. In countries where wind and solar dominate the electricity mix, such as Spain and Portugal, consumers were largely shielded from the impact. These countries are saving millions compared to the most gas-dependent ones. This was illustrated by the recovery of wind generation in Q1 2026, which absorbed much of the shock in countries where it helped reduce fossil gas generation, in particular Germany, the UK and Türkiye.

The fossil fuel industry and its political allies in Europe are once again using an energy price crisis to increase pressure on European leaders. They want actions to prolong Europe's dependence on fossil fuels, e.g. by securing new sources, new gas infrastructures, increasing fossil fuel subsidies, delaying coal plants closures and even weakening the EU ETS.

We know what agenda is needed: more solar, wind and clean flexibility to **accelerate the electrification of heat and mobility with renewables.**

After the war in Ukraine, Europe has just received its second stark reminder in five years of the urgency of implementing these solutions, and it must be the last.

Key facts of Q1 2026: Renewable energy helped reduce the use of fossil fuels, in a context of high gas prices

Hydro

This quarter, **Europe's hydro generation matched seasonal norms** of the last six years**,** reaching 160 TWh (+7 TWh, +5% y-o-y). Türkiye's output surged by 60% (+9 TWh) thanks to heavy rainfall, rebounding from a dry Q1 2025. In contrast, Norway and Italy saw sharp declines (-11% and -24% y-o-o respectively), with Norway following a strong previous year and Italy suffering from low snow cover.

Solar

Solar generation only saw **modest growth this quarter.** It **rose by just 1.4%** (+1 TWh year-on-year), the smallest increase ever registered for solar power. This is below what would be expected given Europe's solar capacity additions over the past year (approximately +17%). The sluggish performance is largely due to **unfavourable weather**, with a persistent cloud cover across much of Europe in Q1, particularly in February.

Coal exit status

The milestone of **200 coal power plants in Europe being retired or announced to retire by 2030 was reached in Q1 2026**, following one announcement of retirement (Govora plant in Romania). The **left-to-go coal power capacity** (with no closure date or post-2030 closure) now **stands at 85.4 GW**. Apart from Italy delaying its coal phase-out by more than a decade, Germany has indicated that it may postpone some planned closures. However, no specifics have been provided. Meanwhile, coal generation in the country decreased in Q1.

Gas tracker status

As of Q1 2026, **Europe's installed gas capacity stands at 254 GW**, an increase of 1.7 GW compared to Q4 2025. The retired and planned-to-retire capacity is 5.9 GW. Planned projects (i.e., before construction) now add up to 62.5 GW, a decrease of 1.7 GW compared to the previous quarter while capacity in construction increased by 1.8 GW (bringing the total to 19.5 GW). In Great Britain, the March 2026 T-4 capacity auction cleared at £27/kW, the lowest T-4 clearing price since 2022.

Zoom in on… Hungary

Hungary has achieved remarkable success in **solar energy deployment.** Solar is now Hungary's second source of electricity after nuclear. However, grid updates and system flexibility have lagged behind, resulting in midday overcapacity and grid congestion that are already **impacting solar growth**.

In response, the country is taking its first steps towards deploying **battery storage,** at both the residential and utility scales. Meanwhile, **wind power, long prohibited by regulatory and political barriers, is finally back on the agenda, though the targets remain insufficient.**

Looking ahead, Hungary must prioritise three key actions: **accelerating grid modernisation, raising its ambitions for wind while sustaining momentum in solar,** and continuing to **scale up battery deployment**. Doing so will ensure that Hungary delivers on its **coal phase-out commitments,** and dramatically reduce its **gas dependence**. Only by addressing these challenges can the country achieve the decarbonisation of its power mix year-round and electrify its economy with renewables

Topics covered

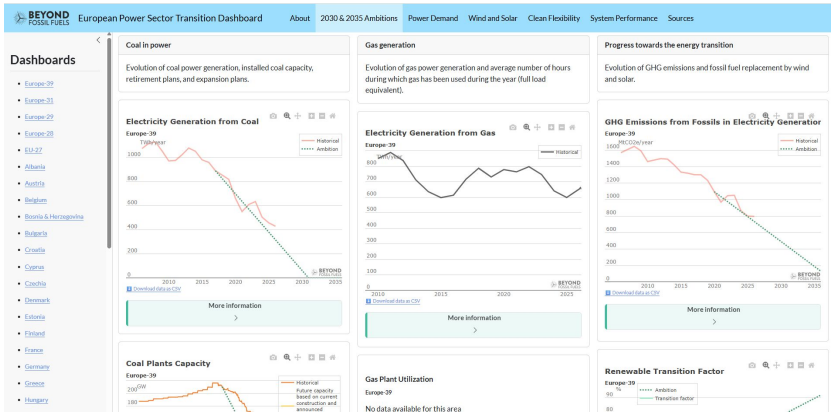
1. **NEW TOOL:** BFF's European Power Sector Transition Dashboard
2. Europe's electricity generation
3. Zoom in on... Hungary's energy transition
4. Europe's coal exit status
5. Europe's gas power plant tracker status
6. Beyond Fossil Fuels' and members' publications

NEW TOOL: BFF's European Power Sector Transition Dashboard

dashboard.beyondfossilfuels.org

- Visualize Europe's progress toward a coal-free electricity sector by 2030 and a fossil-free, renewable-based power system by 2035.
- 20+ charts per country/group, covering ambitions, demand, wind/solar, clean flexibility, and system performance.
- Access: Exclusive for BFF members

  1. Create your credentials here.
  2. Log in at https://dashboard.beyondfossilfuels.org



Webinar: Join us on 7 May, 11:00–11:30 for a live demo! (Zoom link)

Electricity generation in Europe in Q1 2026: Demand on a steady rise despite the Middle East crisis, hydro and wind back to normal conditions

Electricity demand continued its slow yet steady rise

January **2026** was the coldest in Europe since 2010, and, across all months, the one with **the highest electricity demand in the past seven years.** In many countries (such as the UK, the Baltics, Slovenia…) the surge is directly attributed to low temperatures. Italy also reported increased industrial demand in Q1, and Portugal set new demand records, fueled by ongoing electrification and industrial growth.

February presented a mixed picture: the Nordics, Baltics and Poland experienced high consumption, but other regions saw demand levels similar to or below those of 2025. March, the **second-warmest on record** in Europe, brought demand in line with or slightly below the previous year's figures.

All in all, over the quarter, **European electricity demand increased by 15 TWh** (+1.6% y-o-y), consistent with the upward trend observed over the past two years. This suggests that, the **Middle East energy crisis has not altered overall demand for electricity** in March. A more precise diagnosis will only be possible once Q2 figures are available.

Wind recovered from Q1 2025 despite low investment levels.

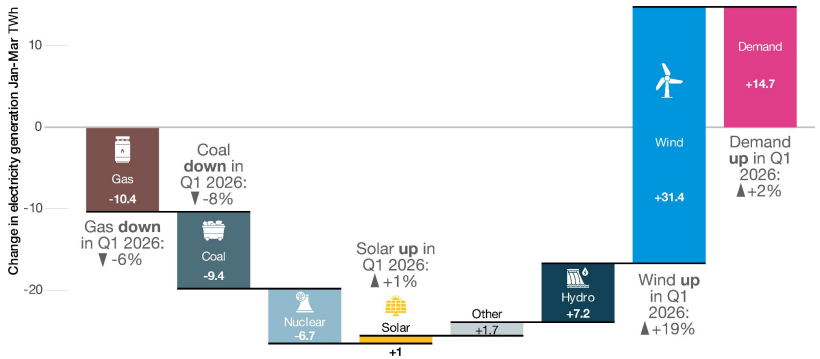
The first months of 2025 had been particularly detrimental to wind generation, hampered by poor wind conditions and episodes of dunkelflaute. **Q1 2026, however, marked a return to normal wind conditions and even favourable ones in February.** This resulted in an **increase of +31 TWh (+19%)** y-o-y. Yet, this apparent surge actually represents **just a marginal increase of +3 TWh (+1.6%) compared to Q1 2024.**

The generation was higher than in previous years for only ten countries. **This stagnation underscores the limited growth in wind capacity**, which is proving insufficient to expand wind's role in Europe's energy mix.

A notable exception is **Türkiye, which** generated a record 13 TWh from wind in Q1. This is largely due to **Türkiye's new wind capacity**, mostly onshore, as the country became Europe's second-biggest market for new wind power installations in 2025, just after Germany.

EUROPE: year-on-year change in electricity generation by fuel in the first quarter

Jan 2026 — Mar 2026 versus Jan 2025 — Mar 2025



Source: BFF elaboration based on Ember monthly electricity data (more information on the data in the Annex)
The category "Other" includes bioenergy, other renewables, other fossil fuels and net imports.

Hydro generation aligned with seasonal average, with regional disparities

This quarter, Europe's hydro generation was **close to historical averages**, producing 160 TWh, just above the 157 TWh average of the past six years. This is **an improvement over Q1 2025** (+7 TWh, +5% y-o-y), which had been dragged down by a drier season in Türkiye. Heavy rainfalls boosted Türkiye's hydro production by 9 TWh this quarter (+60% y-o-y).

At the other extreme, Norway saw a significant decline in hydro generation (-5 TWh, -11% y-o-y) after an exceptionally strong Q1 2025. **Italy also experienced a sharp drop** (-1.6 TWh, -24% y-o-y), due to a lack of snow cover in key areas.

Electricity generation in Europe in Q1 2026: Solar hampered by weather conditions, while nuclear generation is on a slow decline

Solar power registered a timid growth amid unfavorable conditions

In Q1 2026, European **solar power rose, but only by 1.4%** (+1 TWh), compared to Q1 2025. This is the smallest increase ever recorded for solar power, and is not in line with the increase in capacity (approximately +17%)

Though the situation varies across countries, this is overall **a under-performance** for solar power. Portugal registered for instance a drop of 48% y-o-y in February. Weather agencies pointed to a challenging start of the year, especially in February, with **low radiation,** especially in eastern Europe and the Nordic, with persistent cloud cover.

The highest absolute decrease was seen in the Netherlands (-0.7 TWh, -14% y-o-y), while Italy recorded the highest increase (+1.2 TWh, +18% y-o-y).

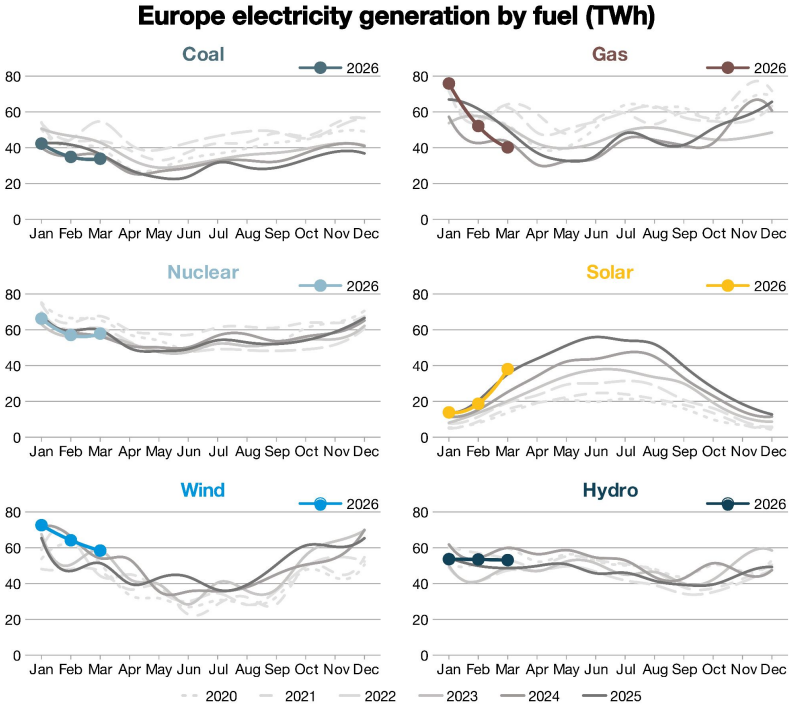
All in all, wind, solar and hydro generation together reached an all-time quarterly level of 426 TWh.

Nuclear generation: mixed trends and continued slow decline

Overall, **nuclear energy continued on a slight decline (-6 TWh, -3% y-o-y) for the fourth consecutive quarter.**

This quarter, **the nuclear fleet in France had a higher availability** (+1 TWh, +1% y-o-y) and Finland's production increased (+1.3 TWh, +17% y-o-y) as nuclear reactor Olkiluoto 3 was back in operation after 2025's maintenance.

Nonetheless, nuclear generation continued to **decrease in Belgium** (-3.3 TWh, three reactors closed in 2025), the **UK** (-0.7 TWh, related to unplanned outages at Hartlepool), and **Switzerland** (after Gösgen was out of service for ten months to correct identified safety issues and only recently restarted). Nuclear production also decreased in **Spain** (-1.7 TWh, -11% y-o-y). It does not seem to be related to outages, but to the **good performance of renewables and lower demand**, which reduced the need for nuclear energy.



Source: BFF elaboration based on Ember monthly electricity data (more information on the data in the Annex)

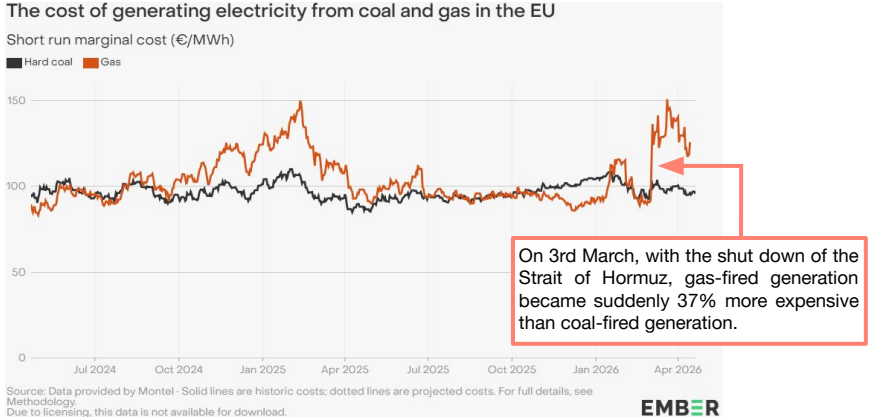
Electricity generation in Europe in Q1 2026: Coal and gas generation both fell, amid good renewable production and high gas prices linked to the Middle East crisis

Fossil gas generation decreased, amid high renewable generation and sky-high gas prices

The war in the **Middle East,** which started on 28 February and led to the shutdown of the Strait of Hormuz, is heavily impacting the supply of oil and gas. Gas markets reacted sharply: the price of gas, and therefore, the cost of gas-fired generation, dramatically increased. Ember notes that, **in the EU, it jumped by more than 50% in the first ten days of the conflict.** The impact on electricity prices varies greatly depending on the countries' gas reliance, with for instance Italy being one of the exposed countries due to its massive gas fleet.

Overall, **Europe gas generation decreased by -10 TWh** in Q1, (-6% y-o-y), mostly led by Türkiye (-8 TWh) and the UK (-4 TWh). **The EU, nonetheless, registered a slight growth** (+3 TWh, +2% y-o-y), led by Poland, Italy, Finland and Portugal that increased their generation by approximately 1 TWh each. Most of the gas increase in the EU occurred during the **cold month of January**, while February and March saw a drop.

In March, thanks to the combined production of wind, solar and hydro and to warm weather that reduced heating demand, Europe cut its dependency on costly fossil fuels by 17 TWh, from 319 TWh generated from fossils in Q1 2025 down to 301 TWh in Q1 2026.



Coal generation declined amid better wind and hydro conditions, the energy crisis fails to reverse the trend so far.

In Q1 2026, **coal generation dropped by 9 TWh** (-8% y-o-y). This decline primarily offsets the unusual surge of Q1 2025, which was driven by poor wind conditions and low hydropower output in Türkiye. **With wind and hydro back to normal levels, the reduction in coal generation was expected**.

The decrease is led by Germany, the Netherlands, Bulgaria and Spain that together removed 7 TWh of coal. Only Poland and Croatia saw marginal increases (respectively +0.3 and +0.2 TWh).

However, the impacts of the **war on energy markets** has reignited the narrative of a potential "coal comeback". As gas prices rose, **coal-fired generation became more cost-competitive than gas-fired generation**. Yet, as highlighted by CREA, there is **no clear evidence that this coal comeback materialised in Europe**. Still, some governments have seized upon this narrative to justify delaying coal plant closure. **Italy** even announced **pushing back its coal phase-out deadline from 2025 to 2038,** despite very low use of coal in the mix.

Zoom in on … Hungary 1/5

Hungary's 2025 electricity mix (share of demand)***:*** *NUCLEAR: 33%, SOLAR: 22%, IMPORTS: 18%, GAS: 17%, COAL 3%, OTHER: 3%*

BFF warmly thanks Eszter Galambos and Alexa Botár from Magyar Természetvédők Szövetsége (Friends of the Earth Hungary) and Csaba Vaszko for their review and comments.

Since 2018, Hungary has substantially expanded its solar PV generation capacity, covering now one fifth of its electricity demand. This allowed the country to decarbonise its electricity mix, while curbing reliance on coal.

Meanwhile, wind power has been in total disgrace, and this "all-in" approach on solar seems to be hitting a ceiling. Grid constraints are increasing, and it proves impossible for Hungary to decarbonise the less sunny periods of the year. To move forward, Hungary must now diversify its renewable energy portfolio, complementing solar with wind, and prioritise the development of clean flexibility while reducing its reliance on fossil gas.

Since 2018, Hungary has developed its solar fleet at high speed

In 2018, solar accounted for just 2% of Hungary's electricity generation. By 2025, it had jumped to 27%. This rapid expansion was helped by two key factors:

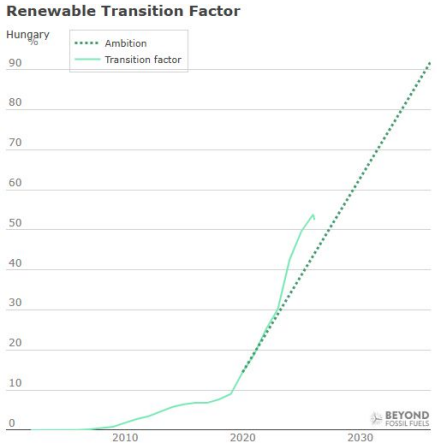
- a higher solar potential compared to neighboring Visegrád countries (Czechia, Poland, Slovakia).
- and **favourable support mechanisms**, the so-called KAT and METAR feed-in tariffs, which guaranteed long-term above-market prices.

These support schemes - one of the most generous in Europe for homeowners - created stable, attractive conditions for both large-scale and residential solar projects. Nonetheless, the Hungarian government scaled back support in 2023, introducing a series of less favourable policies, as highlighted by Ember.

Solar power drives the decarbonisation of the electricity mix

2025 marked a turning point for Hungary: **for the first time, annual solar generation surpassed fossil fuel generation. With a solar generation share of 27%, the country now ranks ahead of solar leaders** such as Greece (22%) and Spain (22%).

Overall, the power sector's greenhouse gas emissions fell by 36% between 2018 and 2025, demonstrating significant progress in decarbonisation.



This chart is extracted from BFF's European Power Transition Dashboard.

The Renewable Transition Factor (RTF) tells how much of the electricity demand is met by wind and solar instead of fossil fuels. When the RTF is growing, it means a greater share of the demand is covered by renewables. The dotted line represents the trajectory for transition towards a fossil-free power mix by 2035.

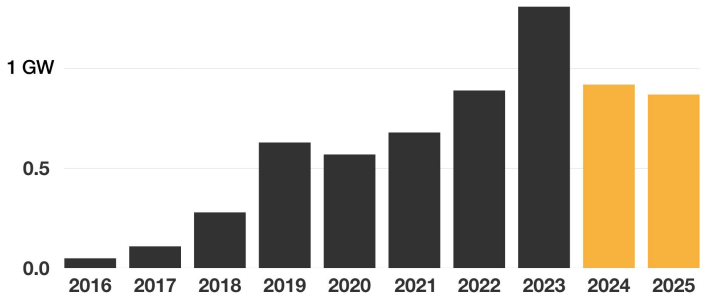
Zoom in on … Hungary 2/5

With a one-sided renewable mix but limited flexibility, Hungary's power system is nearing its limits, and solar is losing momentum

Although no official data on grid congestion is published, there are signs that the electricity system is **approaching its technical limits.** Rapid PV expansion has outpaced grid investment, causing **daytime oversupply and** local congestion. The **surge in negative-price hours** (2 hours in 2023, to 280 in 2025) is a strong market symptom that points to a growing flexibility gap and suggests that part of the excess solar generation could be shifted to the evening.

Combined with weaker support schemes, these grid constraints have driven a decline in solar installations since 2023. Utility-scale PV still made up the largest share of new additions, but with no new grid connection permits **issued over the past three years, the utility-scale segment is likely to stagnate in 2026.**

The amount of new solar capacity added has been declining over the past two years



Source: BFF elaboration based on Ember monthly capacity data

Number of hours with negative electricity prices in Hungary
Average over the last 12 months

This chart is extracted from BFF's European Power Transition Dashboard.

Source: BFF elaboration based on ENTSO-E data

Zoom in on … Hungary 3/5

Hungary begins to deploy batteries to increase system flexibility

After making a major push to become a hub for electric vehicles battery production, Hungary is now supporting electricity storage installations. In Hungary's solar-heavy system, batteries are useful to provide intra-day shifting and fast balancing.

On the residential side, the government **announced** at the end of 2025 a **grant for residential battery storage,** covering up to 80% of eligible investment costs per household, for the owner of solar panels.

On the utility side, major projects are also starting to emerge: Hungary's biggest project so far - a 40 MW battery - was inaugurated in June, and a 99 MW project has secured financing. The European Commission has even approved a €1.1 billion scheme from Hungary to support large-scale energy storage projects.

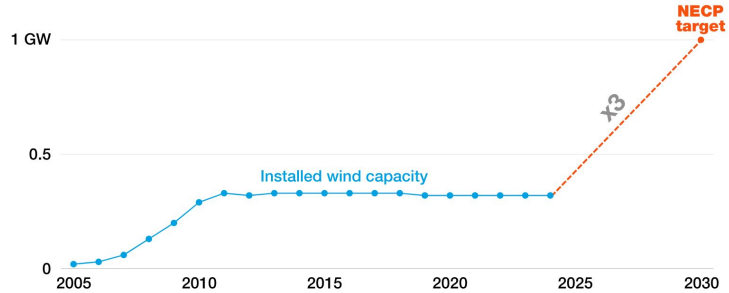
All in all, Hungary **now counts a total of** 114 MW of battery capacity, and has set an **official target of reaching** 1 GW **capacity by 2030**. According to the Hungarian Ministry of Energy, **Hungary is set to surpass 500 MW of battery capacity by the end of the year.**

A 15-year blockade on wind energy

While Hungary's solar sector has thrived, **wind power has faced persistent obstacles**. The government has actively erected **administrative barriers to wind energy** development. The most significant was the 2016 law banning wind turbines within a 12-kilometer radius of populated areas. Additionally, the government imposed technical requirements that most turbine technologies could not meet. Each of these measures alone would have stifled development, and together, they effectively halted any new wind projects.

As a result, Hungary has only 320 MW of installed wind capacity (compared to 8.3 GW of solar capacity). This has not increased at all since 2011. This is despite the country's good wind potential.

After a decade of stagnation, wind capacity is planned to triple by 2030



Source: BFF elaboration based on Ember yearly electricity data and Hungary's NECP

A slow turnaround for wind energy

After years of blockade - despite NGO efforts, **Hungary has finally begun to ease its restrictive stance,** following lengthy discussions with the European Commission. At the end of 2023, the government issued two decrees, one reducing the exclusion zone from 12 km to 700 meters. Further reforms in late 2025 and early 2026 introduced eight facilitated districts for wind permitting and allowing taller towers, albeit in limited numbers and with height limits that are still too low.

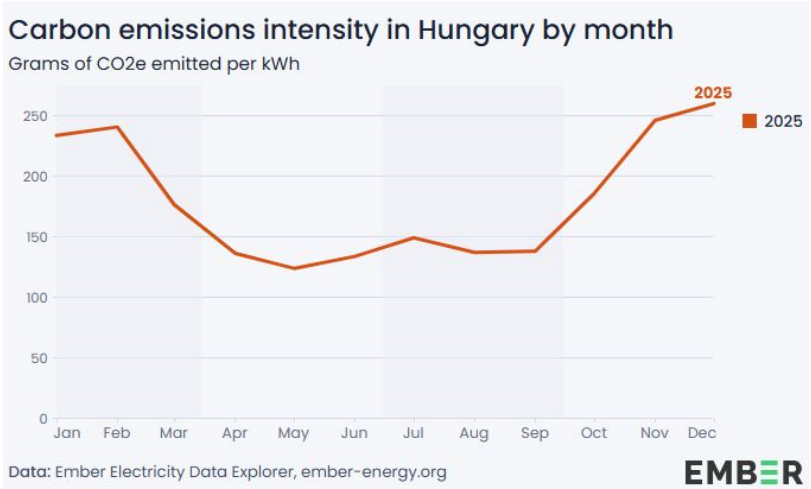
What's more, for the first time in over a decade, Hungary's updated National Energy and Climate Plan (NECP) finally **includes a wind power target: 1 GW by 2030**, which would triple current capacity. While this is undeniably a step forward, **it remains blatantly insufficient** compared to the 12 GW of solar capacity planned in the NECP. It should be noted that the solar target is already not so ambitious compared to the EU average. Moreover, after years of inaction, developing the necessary grid infrastructure and restarting the wind sector will take time. The first new turbines are unlikely to be installed before 2028.

Zoom in on … Hungary 4/5

With strong solar generation but little wind and clean flexibility, Hungary cannot effectively decarbonise the winter months

Hungary's rapid solar expansion has significantly cut emissions during sunny months, but the country still faces a major hurdle in winter. During this period, the low wind generation **does not significantly contribute to generation,** and Hungary has to rely **on costly gas power plants**. As a result, Hungary's electricity is almost twice as carbon-intensive in winter as in summer.

Without a balanced mix of renewables and clean flexibility, Hungary's ability to fully decarbonise its electricity supply remains limited.

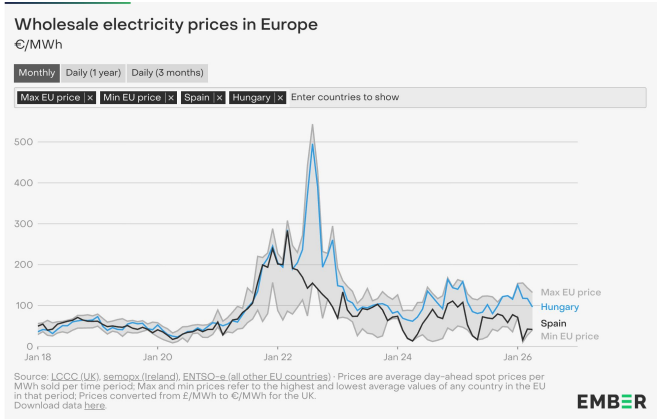


Coal is on the brink of extinction, despite delays

Even though solar has climbed to the second place in the power mix, nuclear remains the first source of electricity generation, and, while blocking the deployment of wind for years, Hungary continued to invest massively in new nuclear, with two 1.2 GW reactors that recently started construction.

Solar energy, nevertheless, played a crucial role in **reducing coal's share in generation from 15% in 2018 to just 3% in 2025**. Biomass generation even exceeded coal generation in 2025, according to MEKH figures.

Hungary had originally planned to exit coal in 2025. Unfortunately, the government postponed this several times, extending the life duration of Matra, Hungary's last lignite power plant. **The coal phase-out is now planned for 2029,** when Matra's lignite-fired units are replaced by a 520 MW gas CCGT.



Zoom in on … Hungary 5/5

Hungary continues to bet on gas, and consumers are paying the price

Despite its investments in solar, Hungary remains heavily and firmly reliant on gas-fired generation. It accounts for approximately 20% of the country's power generation, a share that has been rather steady the last ten years. Hungary currently has **2.6 GW of installed gas capacity.** What's more, it is **actively advancing the development of two major CCGTs:** the 1,000 MW Tisza II plant and the 650 MW Mátra, which started construction in 2025. Hungary does not show any sign of slowing down on gas but quite the opposite.

In fact, **the former government has consistently opposed the European Commission's plans to cut the EU's reliance on Russian oil and gas**, vetoing decisions and using derogations to continue importing fossil fuel from Russia. However, the new government elected in May 2026 promised to end Hungary's dependence on Russian energy by 2035.

As highlighted by CREA, Hungary has ramped up their imports via the TurkStream pipeline, "*transforming Hungary into a strategic Kremlin-backed gas hub for Central and Southeast Europe that undermines EU diversification efforts.*"

As a consequence of this dependency on gas, gas power plants are setting the price in Hungary, leading to high wholesale prices. For instance, they are, on average, 60% higher than in Spain, which has reduced its overall gas consumption over the past three years, curbing the influence of fossil gas generators on power prices. The Hungarian government still manages to keep gas and electricity prices relatively low for households at the price of costly support systems.

In summary, Hungary has achieved remarkable success in solar energy deployment. Solar is now Hungary's second source of electricity. However, grid updates and system flexibility have lagged behind, resulting in midday overcapacity and grid congestion that already slow solar growth.

In response, the country is taking its first steps towards deploying battery storage at both the residential and utility scales. Meanwhile, wind power, long prohibited by regulatory and political barriers, is finally back on the agenda, though the targets remain insufficient.

Looking ahead, Hungary must prioritise three key actions: accelerating grid modernisation, raising its ambitions for wind while sustaining momentum in solar, and continuing to scale up battery deployment. Doing so may encourage the new Hungarian government (from May 2026) to ensure Hungary delivers on its coal phase-out commitments, while reconsidering its gas plans. Only by addressing these challenges can the country achieve the decarbonisation of its power mix year-round and electrify its economy with renewables.

Europe coal plant countdown: Q1 2026 status

With Romania: one announcement of retirement

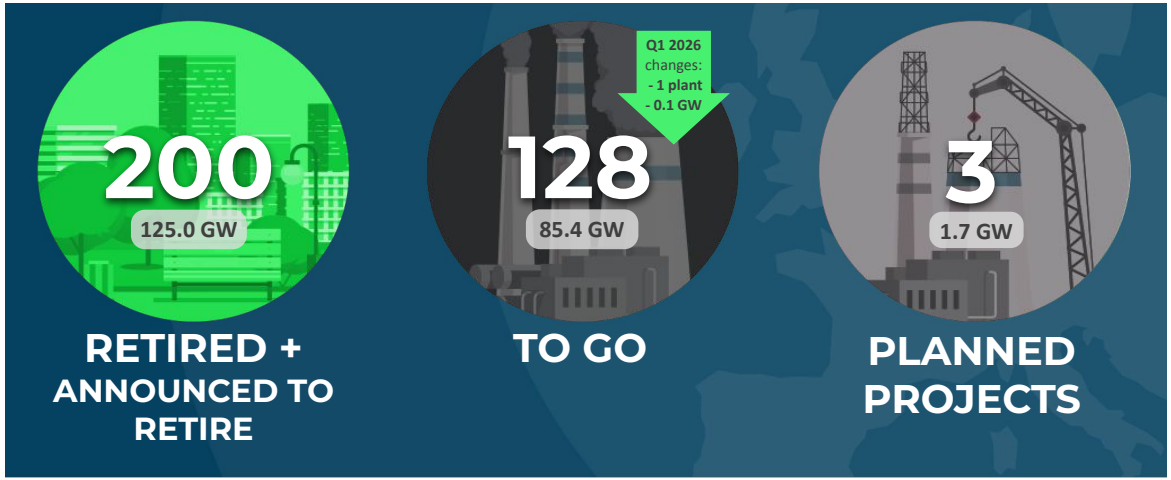
In **Romania**, the government announced in late 2025 that it would extend the operation of a few coal units, including Turceni 4 (330 MW). However, to avoid risking the loss of EU funding by prolonging coal capacity further, the government closed the Turceni 4 unit at the end of March and announced the **closure of the Govora coal power plant (100 MW) by the end of Q3 this year**.

Italy delays its coal phase-out to 2038

At the end of March, **the Italian government decided to delay its coal phase-out by more than a decade, from 2025 to 2038** through an amendment to the 'energy bills' decree and under the guise of energy security. **This decision effectively extends the lifespan of the Brindisi Sud, Torrevaldaliga Nord, Fiume Santo and Sulcis coal power plants**, most of which are among the oldest and most polluting ones in the country and currently generate less than 1% of Italy's electricity (see BFF press release and ECCO analysis).

Germany: talks of delayed closures

Germany has indicated that it may delay the planned closure of its coal power plants further or bring some of them out of reserve, although no specifics have been provided. A scheduled second revision of the coal phase-out law is due this year. Meanwhile, **one of the two remaining 150 MW units at the Hannover-Stöcken coal power plant closed** as planned in March, and **coal generation in Germany fell by 7% year-on-year that same month,** and by 5% overall in Q1.



This quarter, the milestone of **200 coal power plants in Europe being retired or announced for retirement by 2030 was reached** (+1 plant, +0.1 GW compared to Q4 2025). 128 plants have no retirement date or are scheduled to retire after 2030, and three planned projects still remain as of Q1 2026.

New Q1 retirement announcements +1	Coal power plants retirements in Q1 +1	New coal projects (change) 0
• **RO Govora** (100 MW)	Previously announced as due to retire, and now retired: • **DE Cologne-Merkenich** (85 MW)	No project countdown change in Q1.

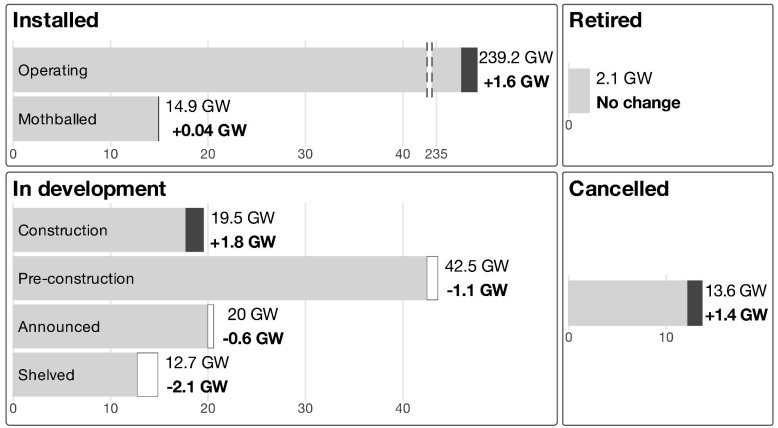
Source: Beyond Fossil Fuels coal database; status: April 2026

Europe gas plant tracker: Q1 2026 status

As of Q1 2026, the installed gas capacity in Europe stands at 254.1 GW, an increase of 1.7 GW compared to Q4 2025.
Capacities retired and planned to retire add up to 5.9 GW, with 18 plants, 12 of which have a retirement date before 2035. Capacity under construction amounts to 19.5 GW (38 plants), 1.8 GW more than the previous quarter, while planned projects account for 62.5 GW, a decrease of 1.7 GW compared to the previous quarter.

Capacity of gas power plant by status

Quarterly changes in Q1 2026 are shown as either ■ increases or □ decreases
Note: the operating capacity bar uses a scale break.



Source: Beyond Fossil Fuels gas database; status: April 2026

Notable changes in Q1 2026:

Cancellations, retirements and retirement announcements

- King's Lynn B power station (UK, 1,700 MW, CCGT) was cancelled, after six unsuccessful T-4 capacity market bids over seven years and no evidence of active development since it was shelved in April 2024.
- The planned retirement of Rijnmond 1 power station (Netherlands, capacity corrected to 750 MW) was postponed from March 2026 to March 2027 by EP NL, citing marginally improved market conditions, with the company reiterating support for a Dutch capacity mechanism.
- Monthey (Switzerland, 50 MW) and Cornaux (Switzerland, 36 MW) with retirement announced for 2030.

Commissioning

- Oradea power station (Romania, 30 MW, ICCC, CHP) was commissioned in Q1 2026.
- Several units commissioned in previous quarters have been retrospectively included this quarter, among them the 840 MW Fusina CCGT (Italy), the North Wall emergency generation plant (Ireland, 210 MW), Poolbeg and Ringsend flexgen units (Ireland, 65 MW each), and Karolin (Poland, 114 MW).
- Coryton power station (UK) was upgraded in Q1 2026, adding 85 MW to bring the plant to 885 MW total.

Projects (new or expanded gas power plants)

- Construction began in Q1 2026 on the Tisza power station (Hungary, 1,000 MW CCGT) and two units at Kozienice (Poland, 1,400 MW combined, CCGT).
- Kilshane (Ireland, 300 MW OCGT) and Roskovec (Albania, 170 MW, coal-to-gas CCGT) also started construction.
- Schkopau power station (Germany, 900 MW CCGT), Niš power plant (Serbia, 500 MW), and PGE Gdańsk CHP (Poland, 35 MW, ICCC) advanced to pre-construction.
- A shelved unit at Tynagh power station (Ireland, 350 MW OCGT) was moved back to pre-construction following planning permission granted in March 2025 for an expanded project on the same site.

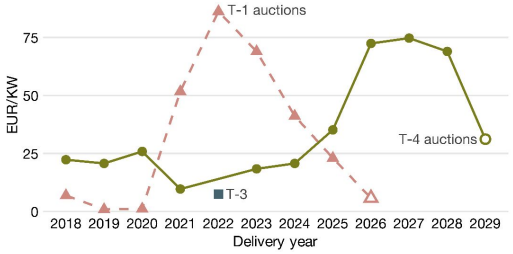
Europe gas plant tracker: Great Britain capacity auction results

In March 2026, Great Britain held its two annual capacity market auctions. The four-year-ahead auction (T-4, for 2029-30 delivery year) cleared at £27/kW. This was a 55% decline from the 2028-29 delivery year and the lowest T-4 price since 2022, driven by a lower capacity target and larger supply surplus. The one-year-ahead top-up auction (T-1, for delivery in 2026-27) also fell sharply to £5/kW. Nuclear capacity, ineligible for the T-4, dominated the smaller T-1 target.

The T-4 awarded approximately 23 GW of gas contracts, with refurbishment reaching its highest level across all auctions at 12 GW, while existing capacity fell to its lowest at 11 GW. **For the second consecutive T-4, no utility-scale new CCGT won a contract.** Refurbishment was led by RWE (6 GW) and Vitol (2.9 GW). Most refurbishment contracts are 1-year; the previous T-4 (DY2028–29) stands in contrast, having produced the longest-duration gas contracts currently active in GB, with EP Group securing two 15-year refurbishment agreements.

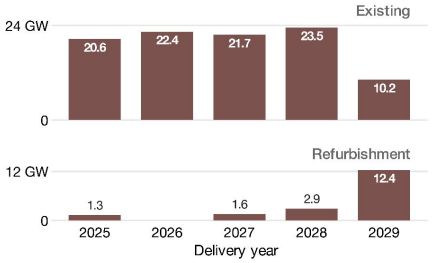
The utility SSE experienced the largest overall auction failure (1.8 GW), with Peterhead, Burghfield, Medway and Chickerell (both with 15-year bid) failing to secure agreements, leaving only Keadby 1 and Marchwood (awarded 835 MW as existing) clearing. New-build and refurbishment bids also fell short elsewhere, with EP Group's Corby new-build (364 MW, acquired last year) and Vitol's Rye House refurbishment bid (56 MW) both unsuccessful, the former for at least the sixth consecutive time it entered auction.

GB capacity market clearing prices



Prices in EUR/KW using an exchange rate of 1 GBP = 1.149 EUR.

Gas capacity cleared by contract type



Refurbishment contracts awarded in the T-4 DY2029–30 auction

Plant	Utility	Awarded capacity (MW)	Contract years	Estimated total value of contracts
Pembroke	RWE	1,996	1 & 3	€111.9 M
Staythorpe C	RWE	1,591	1 & 3	€74.3 M
Didcot B	RWE	1,339	1	€41.7 M
Little Barford	RWE	672	1	€20.9 M
Great Yarmouth	RWE	372	3	€34.8 M
Immingham	Vitol	1,106	1	€34.4 M
Damhead Creek	Vitol	737	1	€23.0 M
Rye House	Vitol	649	1	€20.2 M
Shoreham	Vitol	418	1	€13.0 M
Keadby 1	SSE	686	1	€21.4 M
Saltend	SSE & Equinor	999	1	€31.1 M
West Burton B	TotalEnergies & EP Group	1,166	1	€36.3 M
Connah's Quay	Uniper	626	1	€19.5 M
		12,358		**€482.6 M**

Recent Beyond Fossil Fuels' and members' publications

BFF: Ireland's capacity market renewal

Ireland's capacity market is coming up for its 10-year renewal in 2028. This briefing warns that without necessary interventions, it could add billions to household energy bills to support data centre electricity consumption.

Read the briefing

Ember: Latest energy shock reminds Europe of its risky gas reliance

Gas prices are spiking as conflict escalates in the Middle East. Reliance on gas for electricity generation varies across the EU, exposing some countries more than others to the risk of rising bills.

Read the briefing

BFF: The AI climate hoax: behind the curtain of how big tech greenwashes impacts

The report finds that claims about "AI sustainability" blur the differences between generative AI and "traditional" AI, in a new form of greenwashing.

Read the report

IEEFA: Impact of Middle East Crisis on Global Energy Markets

This page brings together IEEFA's global and regional analysis, data, and expert commentary on how the crisis is affecting oil and gas markets, energy security and investment decisions.

Access the FAQs

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Read the report

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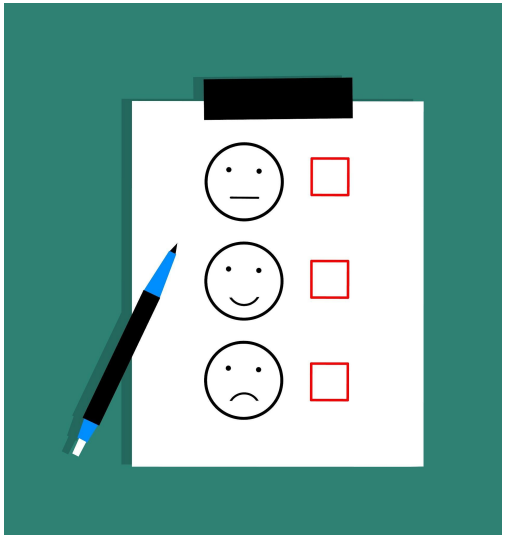
Your feedback matters!

Tell us what you're interested in so we can make next quarter's report even more **valuable**!

Please take **one minute** to fill our short:

[feedback form]

Thank you !

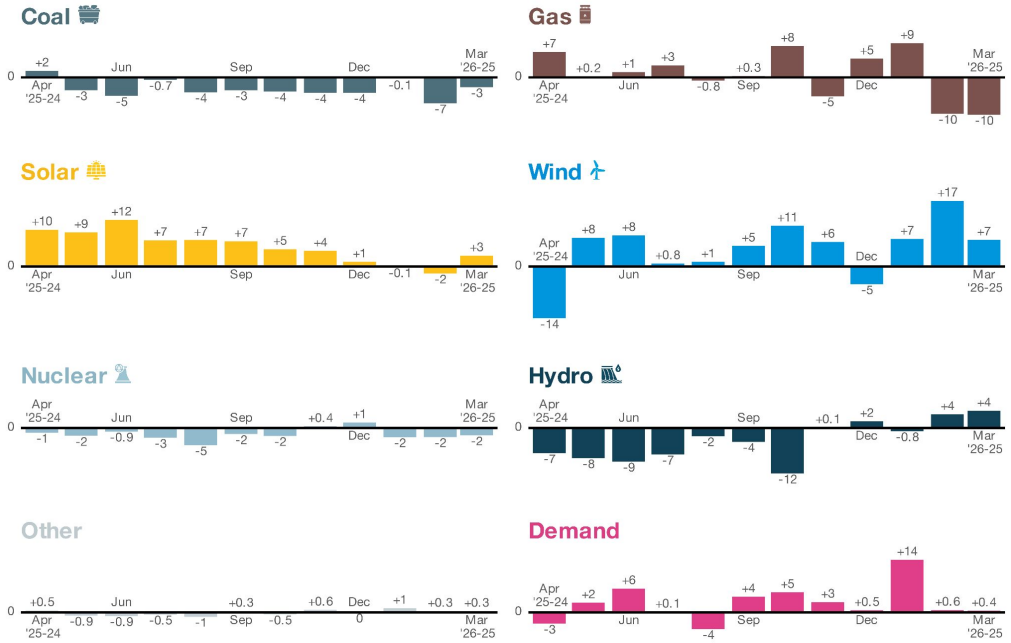


Contact:
Isaline Court, isaline.court@bff.earth

Annex – Europe monthly year-on-year changes in electricity generation

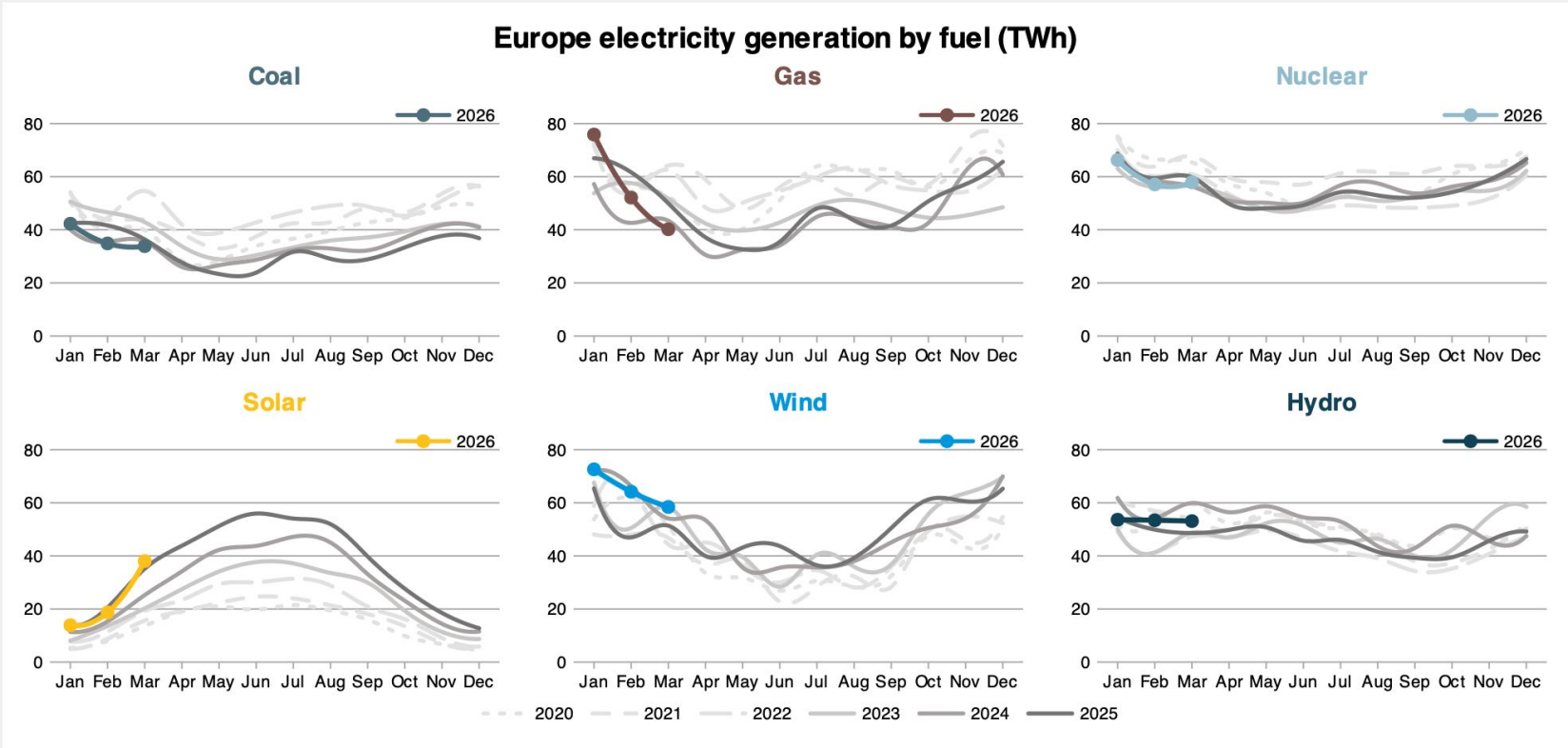
EUROPE: year-on-year change in electricity generation by fuel in the last 12 months (TWh)

Apr 2025 — Mar 2026 versus Apr 2024 — Mar 2025



Source: BFF elaboration based Ember monthly electricity data (more information on the data in Annex)
The category "Other" includes bioenergy, other renewables, other fossil fuels and net imports.

Annex – Europe monthly power generation in 2026 and previous years

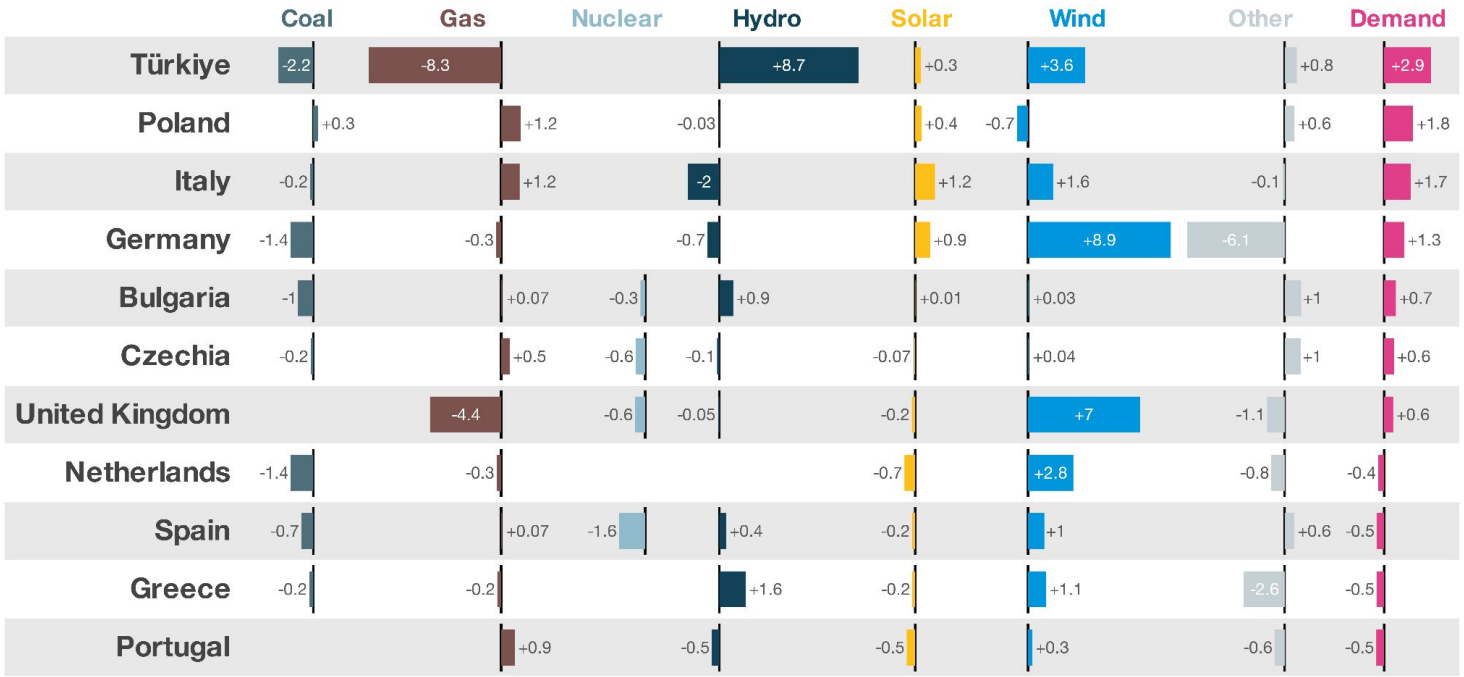


Source: BFF elaboration based Ember monthly electricity data (more information on the data in Annex)

Annex – Quarterly year-on-year changes in electricity generation in selected European countries

First quarter year-on-year changes in electricity generation and and demand in selected countries (TWh)

Jan 2026 — Mar 2026 versus Jan 2025 — Mar 2025



Source: BFF elaboration based Ember monthly electricity data (more information on the data in Annex)
The category "Other" includes bioenergy, other renewables, other fossil fuels and net imports.

Annex – Summary tables of electricity generation and demand

EUROPE: electricity generation and demand in Q1 2026

Electricity generation	Q1 2026 value (TWh)	Q1 2026 year-on-year change (TWh)	Q1 2026 year-on-year change (%)	Share of total generation in Q1 2026 (%)	Share of total generation in Q1 2025 (%)
Coal	111.0	-9.5	-7.9%	11.7%	12.9%
Gas	168.3	-10.3	-5.8%	17.7%	19.1%
Coal and gas	279.2	-19.7	-6.6%	29.3%	31.9%
Other fossil	21.6	1.7	8.8%	2.3%	2.1%
Fossil	300.8	-18.0	-5.7%	31.6%	34.1%
Wind	194.4	30.6	18.7%	20.4%	17.5%
Solar	71.1	1.4	2.0%	7.5%	7.4%
Wind and solar	265.5	32.0	13.7%	27.9%	24.9%
Hydro	160.3	7.4	4.8%	16.8%	16.3%
Bioenergy	37.0	1.0	2.8%	3.9%	3.8%
Other renewables	6.8	-0.3	-3.6%	0.7%	0.8%
Nuclear	182.0	-6.0	-3.2%	19.1%	20.1%
Total generation	952.3	16.1	1.7%		

Electricity demand	Q1 2026 value (TWh)	Q1 2026 year-on-year change (TWh)	Q1 2026 year-on-year change (%)
Demand	947.7	14.8	1.6%

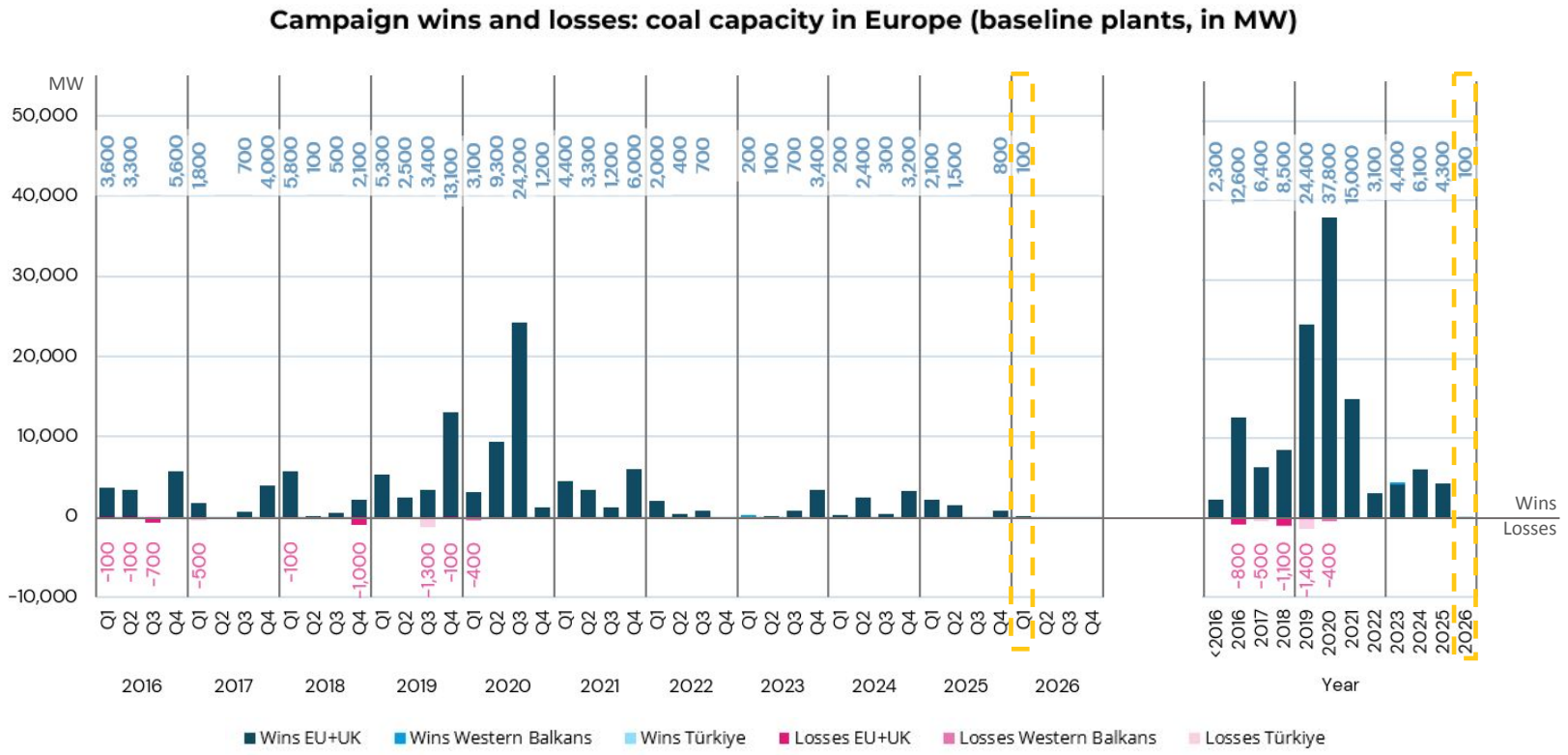
EU-27: electricity generation and demand in Q1 2026

Electricity generation	Q1 2026 value (TWh)	Q1 2026 year-on-year change (TWh)	Q1 2026 year-on-year change (%)	Share of total generation in Q1 2026 (%)	Share of total generation in 2025 (%)
Coal	75.6	-6.1	-7.5%	10.5%	11.6%
Gas	132.5	2.7	2.1%	18.3%	18.4%
Coal and gas	208.1	-3.4	-1.6%	28.8%	30.0%
Other fossil	18.8	1.4	7.8%	2.6%	2.5%
Fossil	226.9	-2.0	-0.9%	31.4%	32.5%
Wind	147.7	19.6	15.3%	20.4%	18.2%
Solar	60.2	1.0	1.6%	8.3%	8.4%
Wind and solar	207.9	20.6	11.0%	28.8%	26.6%
Hydro	86.2	2.9	3.5%	11.9%	11.8%
Bioenergy	29.7	0.8	2.7%	4.1%	4.1%
Other renewables	3.8	-0.2	-4.5%	0.5%	0.6%
Nuclear	168.6	-4.0	-2.3%	23.3%	24.5%
Total generation	723.2	18.1	2.6%		

Electricity demand	Q1 2026 value (TWh)	Q1 2026 year-on-year change (TWh)	Q1 2026 year-on-year change (%)
Demand	709.4	8.8	1.3%

Source: BFF elaboration based on Ember monthly electricity data (more information on the data in the Annex)

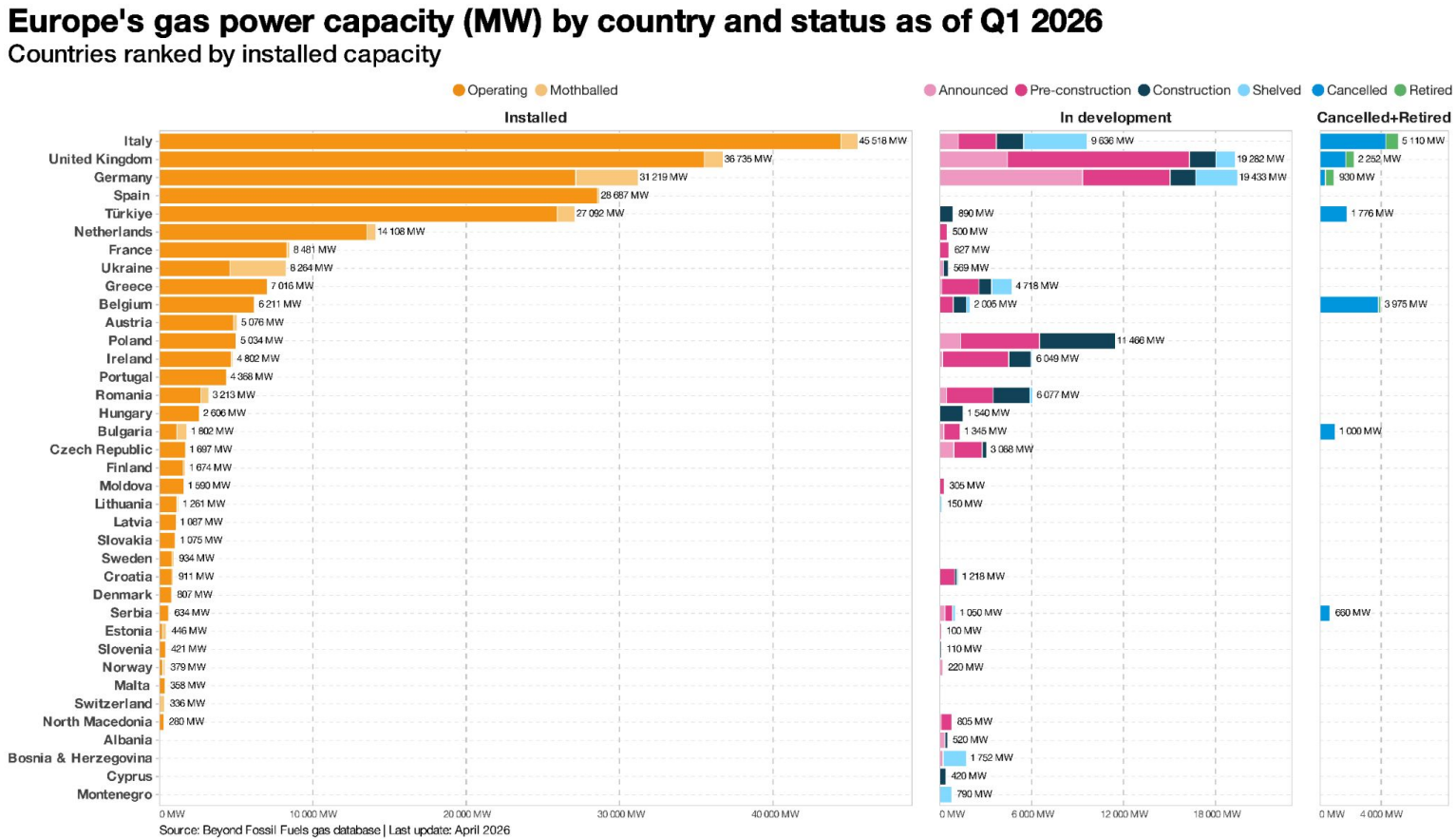
Annex – Quarterly coal campaign baseline log



Campaign wins: retirements and announcements of retirement by 2030
Campaign loss: planned capacity (coal project pipeline) going into construction.

Source: Beyond Fossil Fuels coal database; status: April 2026

Annex – Breakdown of gas capacity in Europe per country



Annex – Methodology

Coal and gas campaign tracking methodology

CAMPAIGN WINS AND LOSSES

- Win: a unit is retired, or its retirement is announced with certainty by 2030 for coal units and by 2035 for gas units.
- Loss: a unit goes from “planned” to “construction”, after the campaign baseline (31 Dec. 2015 for coal units, 31 Dec. 2022 for gas units).

RETIREMENT ANNOUNCEMENTS

- The retirement of a power plant must be certain (and not only “considered”) to be counted as a win.
- Additionally, coal units under national coal phase-out do not fall under the category of “campaign wins” unless the coal phase-out is enshrined in a law, which outlines a detailed retirement schedule for each coal power plant.

PLANNED PROJECTS

- The planned project countdowns consist of active projects, coal or gas power plants, or new units added to existing plants, at any stage before construction. Projects that have been shelved or cancelled are subtracted from the countdowns, but may be added back if a shelved project is revived.

CONSTRUCTION

- Plants and units entering the construction phase are no longer classified as "Planned projects." Instead, they are added to the other countdown categories, as we expect these plants and units to become operational in the future.

Electricity data used in this report

The analyses and charts throughout the report are based on Ember monthly electricity data, with the following caveats:

- Ember’s data is not available for Albania, Ukraine, Moldova, Kosovo, North Macedonia for the period analysed.
- Europe includes the EU-27, Norway, Switzerland, Türkiye, the UK, and the Western Balkans, except for the countries mentioned above.
- Data for Cyprus for all three months and Malta for February and March are missing from Ember’s data and assumed to be identical to the same month of the previous year.
- Data for Ireland for March is missing from Ember’s data and taken from EirGrid. Bioenergy and hydro generation are estimated based on Eirgrid and data from the previous years.

The dataset is freely accessible here on Google Sheet.