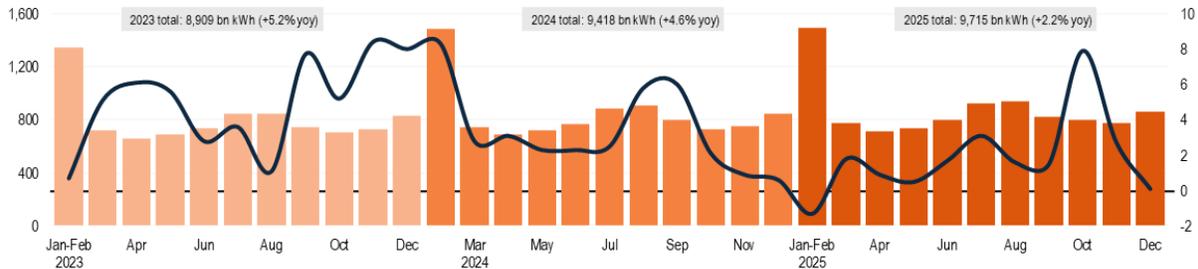


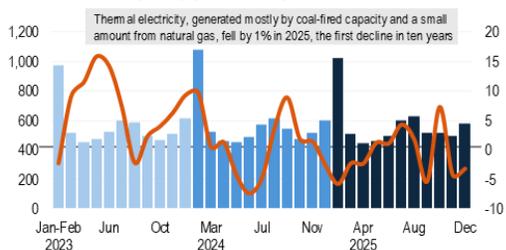
China's Power Generation Expands as Renewables Gain Share

Total electricity generation rose 2.2% in 2025, as thermal output (driven largely by coal) declined for the first time in a decade, with strong gains in solar and wind sustaining overall expansion.

China Monthly Output of Electricity, kWh bn, and YoY Growth, % (RHS) (2023-2025)



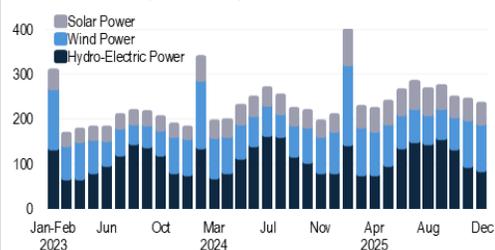
China Monthly Output of Thermal Power, kWh bn YoY Growth, % (RHS) (2023-2025)



China 2025 Energy Output Snapshot

- Total electricity output: 9,715 bn kWh (+2.2% yoy)
- Thermal power output: 6,294 bn kWh (-1.0% yoy)
- Hydro-electric power output: 1,314 bn kWh (+2.8%)
- Wind power output: 1,053 bn kWh (+9.7%)
- Solar power output: 573 bn kWh (+24.4%)
- Nuclear power output: 481 bn kWh (+8.2%)

China Monthly Output of Solar, Wind and Hydro-Electric Power, kWh bn (2023-2025)



Note: China NBS reports January and February as a combined figure to account for Lunar New Year timing effects. kWh: Kilowatt-hours. Source: National Bureau of Statistics of China, ANDAMAN PARTNERS Analysis

China's power output continued to expand in 2025, but the composition of that growth shifted in a meaningful way. Total electricity generation reached 9,715 bn kilowatt-hours (kWh), up 2.2% year-on-year, confirming that overall demand remains resilient even as growth has normalised from the stronger post-pandemic rebound years. Monthly data show steady expansion through the year, with typical seasonal peaks in summer and late autumn, underscoring that industrial and services activity continues to require large-scale energy input.

The structural inflection lies beneath the headline number. Thermal power output, generated mostly by coal-fired capacity and a small amount from natural gas, declined 1% in 2025, marking the first annual drop in a decade. Incremental generation instead came from renewables: solar output surged 24.4%, wind rose 9.7%, and hydro increased 2.8%. In effect, China expanded total electricity supply without relying on higher fossil-fuel generation, a notable shift for a system where coal has long provided the backbone of baseload capacity.

In absolute terms, the scale remains striking. At nearly 10 trillion kWh, China's 2025 electricity consumption exceeded the combined 2024 power consumption of the European Union, Russia, India and Japan, highlighting both the sheer size of China's industrial base and the global significance of its energy transition. For supply chains, commodity markets, and climate policy

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alike, China's energy demand continues to expand, but marginal growth is increasingly coming from wind and solar rather than coal.

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