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MORE OPTIONS AGREE

Peter Hannam Nov 4, 2026

CHART OF THE DAY | MARKETS | RENEWABLES | SOLAR

If there's a reliable prediction to make each year it's that the International Energy Agency will underestimate the annual output of solar photovoltaic panels.

That remarkably consistent undershoot is a focus of an upcoming book by Netherlands-based energy researcher, Auke Hoekstra, "Power to the People".

In social media posts, including on Bluesky, Hoekstra said he had started noting the discrepancy almost two decades ago.

Back in 2008, for instance, the IEA was forecasting annual output by 2030 of solar PV that is now churning out of – *mostly* Chinese – factories every couple of days, if that.

The actual output, shown in the dark green line, is almost perpendicular, while the annual IEA updates in their World Energy Outlook reports are generally forecast fairly flat production growth in coming years.

IEA vs reality. [Hoekstra via Bluesky]

As Hoekstra notes, he has used the IEA's "stated policies" scenario because its "current policies" scenario is even more pessimistic.

"It's clear reality keeps surprising the IEA," he said, in a note accompanying the chart.

The IEA's latest WEO, released last November, preceded the soaring price of oil in the wake of the US-Israel war on Iran that broke out in February.

Even so, the agency was also expecting a shift in solar panel demand to sunnier parts of the world:

"Mapping the new geography of demand onto the distribution of global energy resources reveals that, by 2035, 80% of energy consumption growth occurs in regions with high quality solar irradiation," it stated.

"This is a sharp contrast with the past decade when medium- to low-solar regions drove half of the growth," it said. "This helps explain the swift uptake of solar technologies in our scenarios, as well as the rise in demand for cooling."

Put down your glasses, in other words, there are solar surprises yet to come.

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Peter Hannam

Peter Hannam is a veteran journalist whose work spans almost four decades and includes stints outside Australia, including time in China, Japan, Singapore and Mongolia. He has lately reported extensively on energy, climate and environmental issues in Australia, and also worked for the federal Climate Change Authority as a special media advisor.

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Paul Barnes

10 days ago

Apparently the IEA doesn't see a need to replace methodology, forecasting personnel or in fact their management? How well do they go on other technologies, particularly emerging ones?

14

Truth Missile

5 days ago

Auke has been tracking his for a long time and written some great commentary on it, to the point that the IEA got quite miffed with him and started claiming their "scenarios" were not "forecasts" and not to be interpreted as such.

In which case, what is the point of them? In what universe is drawing a chart showing what you think the future will look like **not** a forecast?

Is that like having your cake and eating it too?

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