Forum Energii
Analizy i dialog

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PRESS RELEASE

“The transition is not waiting”: Forum Energii presents its annual analysis of the state of Poland’s energy transition

Poland’s energy transition is clearly accelerating despite the lack of formal adoption of key government strategies, including the National Energy and Climate Plan (NECP). A breakthrough moment, in June last year, marked the first time that renewable energy generation exceeded coal-fired generation. Domestic production of steam coal for power generation has fallen by 47% since 2016. At the same time, renewable energy sources reached a record share of the system’s available capacity, exceeding 51%. However, the rapid changes in the sector are accompanied by continued dependence on fossil fuels, primarily oil and, increasingly, natural gas. The transition is also accelerating on the side of new technologies and adoption by energy consumers themselves. The energy storage sector is developing particularly rapidly, with the capacity of prosumer energy storage systems having reached 0.6 GW in 2025, while storage capacity of these systems doubled over the course of the year. The electric vehicle market is also growing rapidly, increasing by 68%, year on year. The course of Poland’s energy transition and its challenges are presented and analysed in the latest, ninth edition of Forum Energii’s flagship publication, *Energy Transition in Poland. Yearbook 2026.*

The latest fuel crisis, triggered by the armed conflict in the Middle East, once again demonstrated that energy security today means much more than stable supplies of raw materials. It is becoming increasingly closely linked to national security, economic resilience, and competitiveness, highlighting the importance of diversifying energy sources and reducing import dependence.

The cost of fossil fuels continues to rise

Although the growing share of renewable energy sources and improvements in energy efficiency are positive signals for the Polish economy, the country remains heavily dependent on fossil fuel imports. The cost of purchasing these fuels remains enormous: since 2016, Poland has spent PLN 1.3 trillion on imports of raw materials and fossil fuels. In 2025 alone, this amounted to PLN 104 billion. Although imports from Russia have been significantly reduced and in 2025 mainly included hydrocarbons used to produce LPG, this does not mean that Poland has achieved lasting independence from foreign raw materials. Poland remains vulnerable to price fluctuations and geopolitical tensions on global fuel markets.

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More gas in the energy mix, less transparent data

Natural gas is playing an increasingly important role in the Polish economy, not only in the energy sector but also in industry and households. The main supply route remains the Baltic Pipe, through which 46% of imported gas reached Poland, while a further 42% came through the country's LNG terminal. Over the past decade, natural gas consumption has increased by 3.3 bcm (+19%), while domestic production has fallen by 10%. As a result, net imports have increased by one third.

Poland also remains almost entirely dependent on crude oil imports—as much as 98% of the crude oil consumed comes from abroad. The report's authors also point out that the availability of energy market data is becoming an increasingly significant challenge, particularly in the gas sector, where information is often incomplete or inconsistent.

"*The availability of data on Poland's gas market remains a serious problem. Information on imports is often incomplete, fragmented or inconsistent across institutions, making it difficult to monitor changes in the energy market and assess the effectiveness of energy policy. In addition, due to statistical confidentiality, Poland is the only EU country that does not publish household gas price data in Eurostat. As a result, since 2024 we have had to estimate these values based on gas tariffs",* says **Kacper Kwidziński, author of the report and a project manager at Forum Energii**.

The system cannot keep pace with the growth of renewables

The development of renewable energy sources is both rapidly changing Poland's energy mix and increasing the share of cheaper, low-emission energy in the system. However, in order to fully harness this potential, the power system itself must also evolve. It is still largely designed to accommodate the operation of dispatchable conventional coal-fired generation.

Photovoltaics remain the main driver of renewable energy growth. At the end of 2025, installed PV capacity reached 25.9 GW, representing a 22% year-on-year increase. While a decade ago this technology was virtually absent from Poland's energy system, solar power now accounts for almost 12% of the country's electricity generation (compared with less than 0.1% in 2016). The development of the renewables market is also largely driven by prosumers. Poland already has more than 1.6 million micro-installations, with a combined capacity of 13 GW. At the same time, utility-scale solar farms are playing an increasingly important role, adding 3.7 GW of capacity in the past year alone. The growing share of renewable energy requires the accelerated development of sources of flexibility, such as electricity storage systems and the integration of district heating into system balancing.

"*In 2025, the system operator curtailed almost 1.4 TWh of renewable energy generation, equivalent to nearly 3% of potential renewable generation. This is an amount corresponding to the annual electricity consumption of around 700,000 households. The lack of flexibility in the grid and generation units is becoming an increasingly significant challenge for the system. The coming wave of investment in energy storage, grid modernisation and flexible demand will help integrate renewables in the years ahead, but it is important that the pace of capacity growth is matched by the development of flexibility*", says **Kwidziński.**

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Poland remains among Europe's most carbon-intensive economies

Although the pace of CO_2 emissions reductions in Poland has clearly accelerated in recent years, the country remains among Europe's most carbon-intensive economies. The carbon intensity of electricity generation stood at 554 kg CO_2/MWh in 2024, the second-highest level in the EU, despite the indicator having fallen by almost 22% since 2021.

The energy sector accounts for one-third of greenhouse gas emissions in Poland, while the country's high dependence on fossil fuels affects not only its carbon footprint but also energy prices.

Poland also remains one of the world's most carbon-intensive countries in terms of primary energy consumption. With 2.65 t CO_2/toe, it ranks eighth globally. By comparison, Germany's economy emits 17% less CO_2, while Sweden has the lowest carbon intensity at 0.69 t CO_2/toe. At the same time, the EU ETS, the European Union's Emissions Trading System, remains an important source of government revenue.

"*The ETS should be a key mechanism for financing the energy transition. In 2025, Poland sold 52.5 million emission allowances, generating PLN 16.3 billion in budget revenues from auctions. Since 2016, the state has already raised nearly PLN 140 billion in nominal terms from this source. However, we are still waiting for a system to redistribute these funds, for example through the Energy Transition Fund*", says **Tobiasz Adamczewski, Vice President of Forum Energii.**

The report *Energy Transition in Poland. Yearbook 2026* is an annual, independent analysis prepared by Forum Energii experts. It provides detailed information on the energy balance, data on the fuel mix, emissions, imports and investment, as well as the direction of energy policy. The document is intended to serve as a source of knowledge and a point of reference for policymakers, investors, local governments, and the public—all important participants in the transition process.

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The Energy Transition in Poland. Yearbook 2026

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