

State of the Market:

A Snapshot into Blockchain Deployments and Investments in the Power Sector

Colleen Metelitsa | September 5, 2018





About Wood Mackenzie

We provide commercial insight and access to our experts leveraging our integrated proprietary metals, energy and renewables research platform

Wood Mackenzie is ideally positioned to support consumers, producers and financiers of the new energy economy.

- Acquisition of MAKE and Greentech Media (GTM)
- Leaders in renewables, EV demand and grid-connected storage
- Over 500 sector-dedicated analysts and consultants globally, including 75 specifically to power and renewables
- Located close to clients and industry contacts



Wood Mackenzie offices



Wood Mackenzie Power & Renewables offices

Blockchain in Energy Exploded Over the Past Two Years

\$466

Million

invested in blockchain in power

189

Companies

working in blockchain in power

71

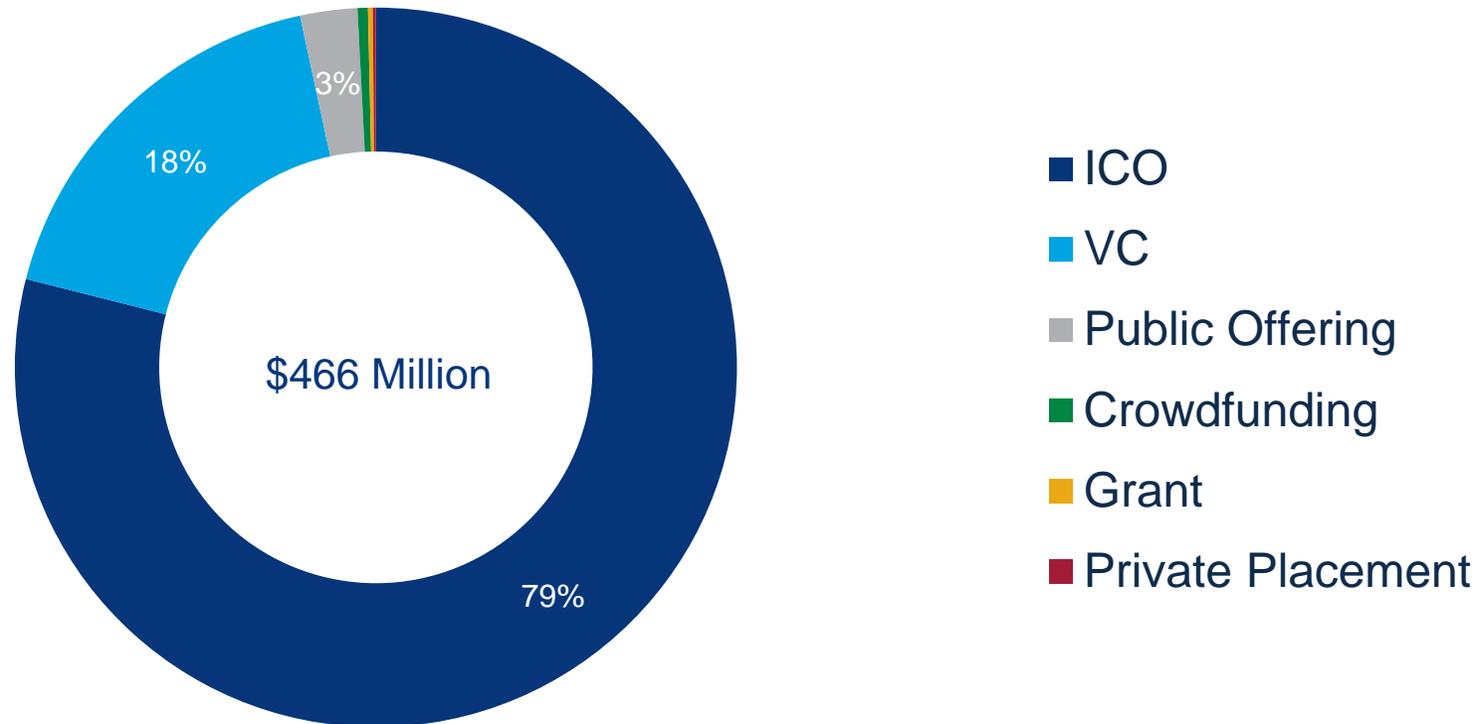
Projects

happening globally

\$466 Million Invested in Blockchain in Power Companies

ICOs Dominate Method of Financings; Venture Capital Rising but Amount Invested Often Private

Breakdown of Funds Raised by Type



Source: Wood Mackenzie Power & Renewables

\$466 Million Invested in Blockchain in Power Companies

Many 2018 ICOs Have Been Delayed or Stalled Due to Turbulence in Crypto Markets

Number of Investment Rounds by Quarter

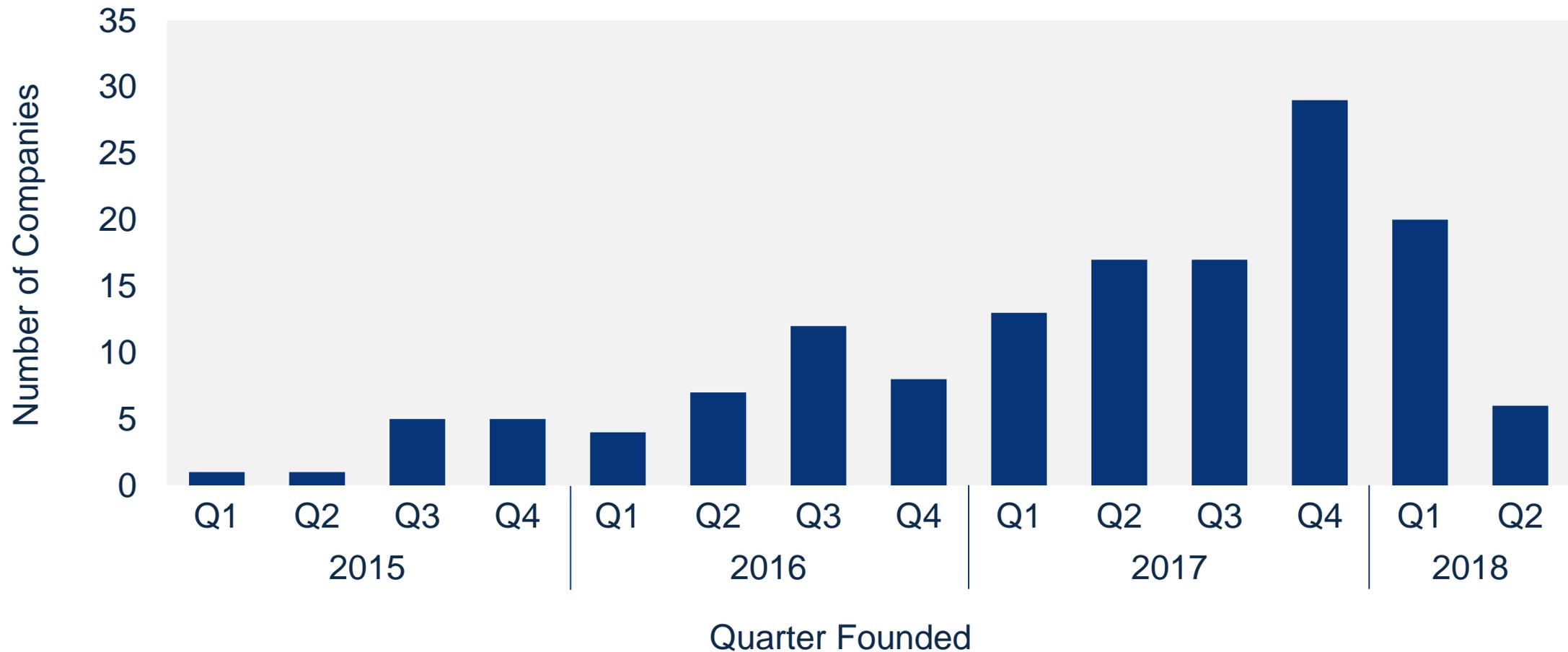


Source: Wood Mackenzie Power & Renewables

189 Companies Formed or Pivoted to Blockchain

There Has Been Slow Down in New Companies Forming Since Q2 2018

Number of Companies Founded by Quarter



189 Companies Formed or Pivoted to Blockchain

32 Companies Leading Blockchain Projects in Grid Edge Space

Companies With at Least One Announced or Underway Project by Use Case

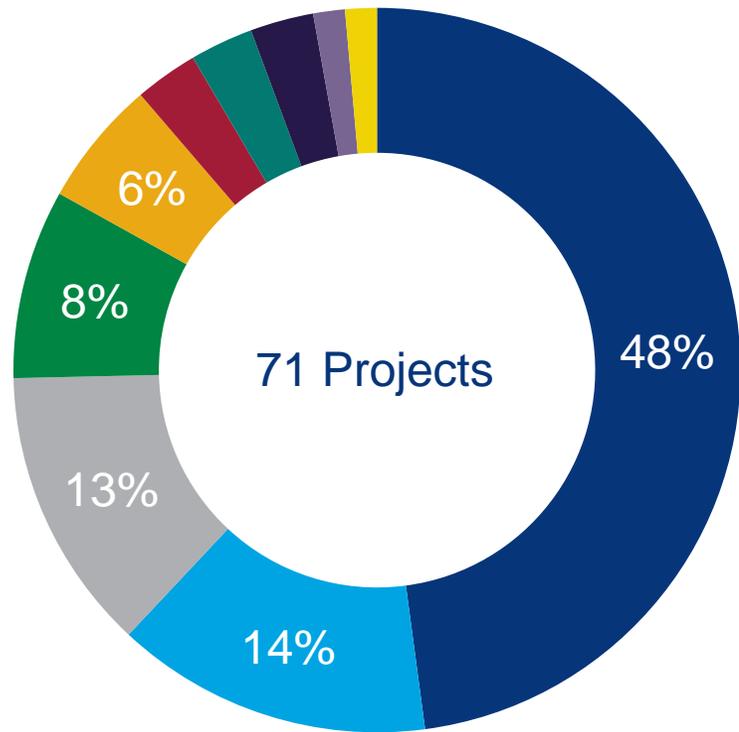


Source: Wood Mackenzie Power & Renewables

71 Projects Publicly Announced Globally

Majority of Use Cases Being Tried Is P2P Energy Trading

Proportion of Projects by Use Case Tested

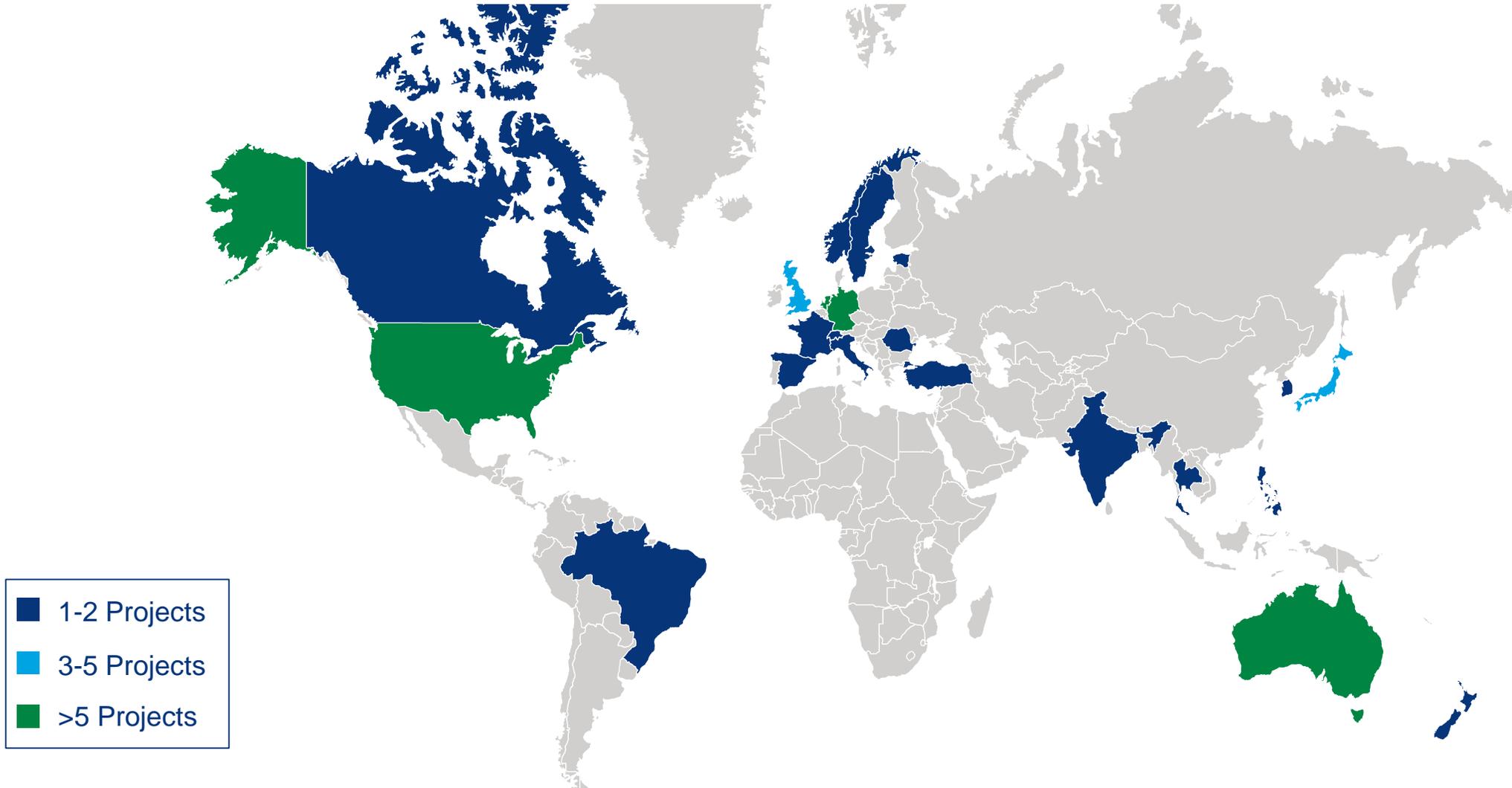


- Peer-to-peer energy trading
- Distribution management
- EV charging
- Retail billing
- Wholesale energy trading
- RECs/Certificate of origin
- Demand response
- Grid flexibility
- Decentralized energy exchange
- Energy efficiency

Source: Wood Mackenzie Power & Renewables

71 Projects Publicly Announced Globally

Europe Holds Highest Concentration of Grid-Edge Blockchain Projects





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