

GOGLA

Accelerating the Off-Grid Solar Market to
Reach Universal Access

Our Mission

GONGLA is the industry association for the off-grid lighting and electrification sector



Our mission is to help our members build sustainable markets, made up of profitable companies, delivering quality, affordable off-grid electricity products and services to as many customers as possible across the developing world.

GONGLA in numbers



> 100
members around
the world

Two membership categories: industry members and associate members. **Industry members** represent mainly off-grid solar manufacturers and distributors. **Associate members** include investors, sector facilitators and research facilities.

13 team members

Based in Utrecht, London,
Mumbai, Nairobi.

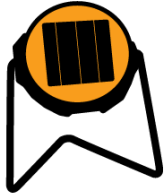
7 BoD members

Representatives of GONGLA
members.

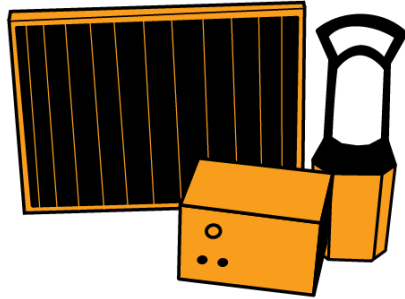
5 working groups

Policy, Impact, Technology,
Business Development and
Sustainability

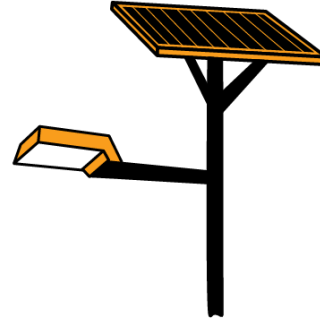
GONGLA Focus



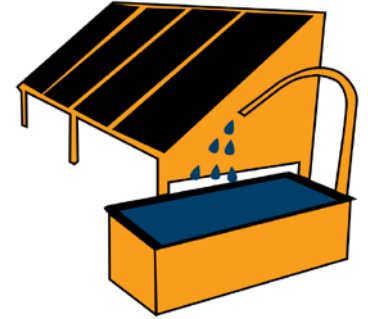
Solar
Lanterns



Solar Home
Systems
(+ Household
Appliances)



Community &
Street Lighting



Off-grid
Productive Use
Appliances

The off-grid solar market at a glance

3.52m

products sold globally
in H1 '17

\$95.6m

Cash sales revenues in
H1 2017

120.3m

People with improved
energy access
historically



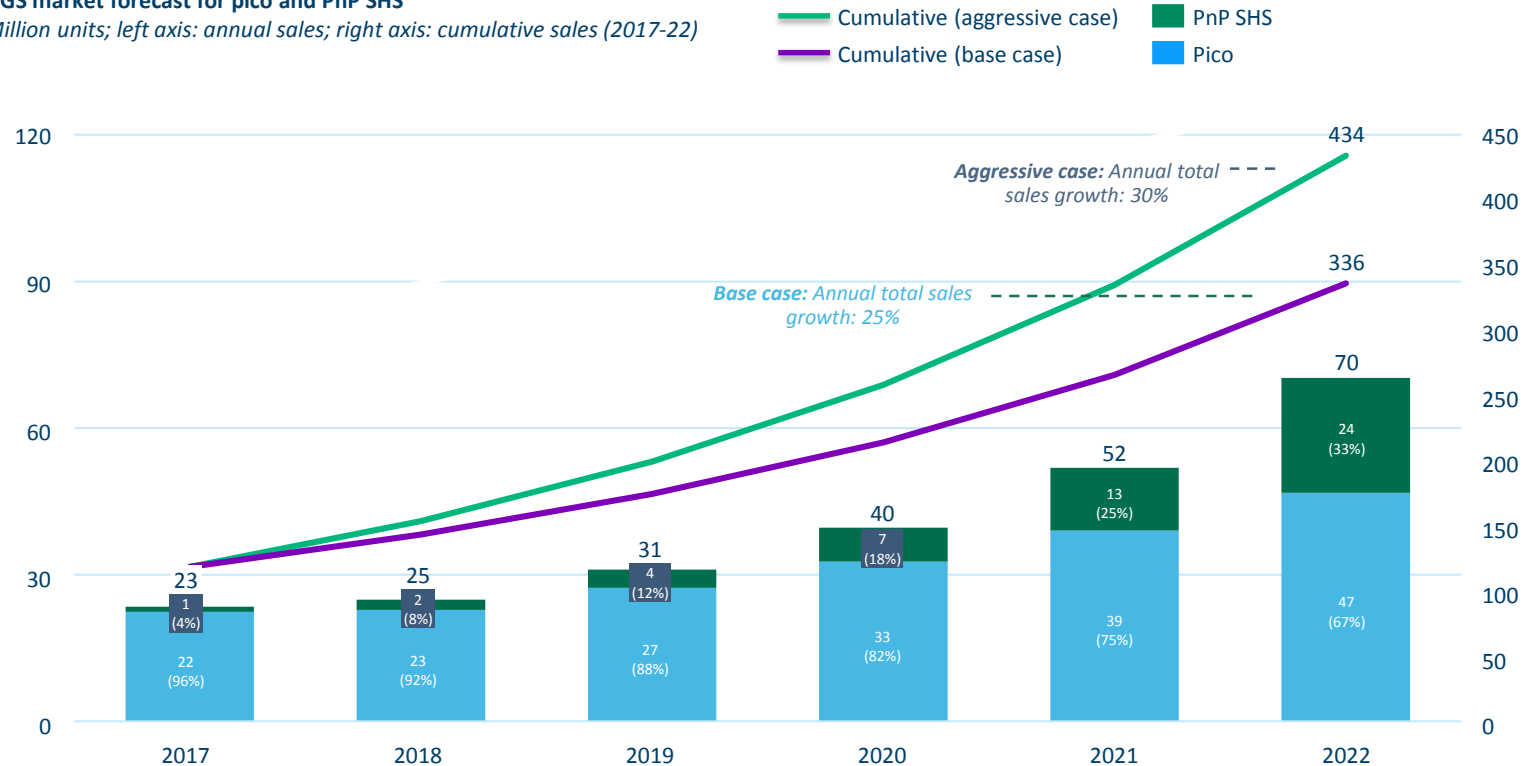
East African countries and
India are key markets.



Market Forecast

OGS market forecast for pico and PnP SHS

Million units; left axis: annual sales; right axis: cumulative sales (2017-22)

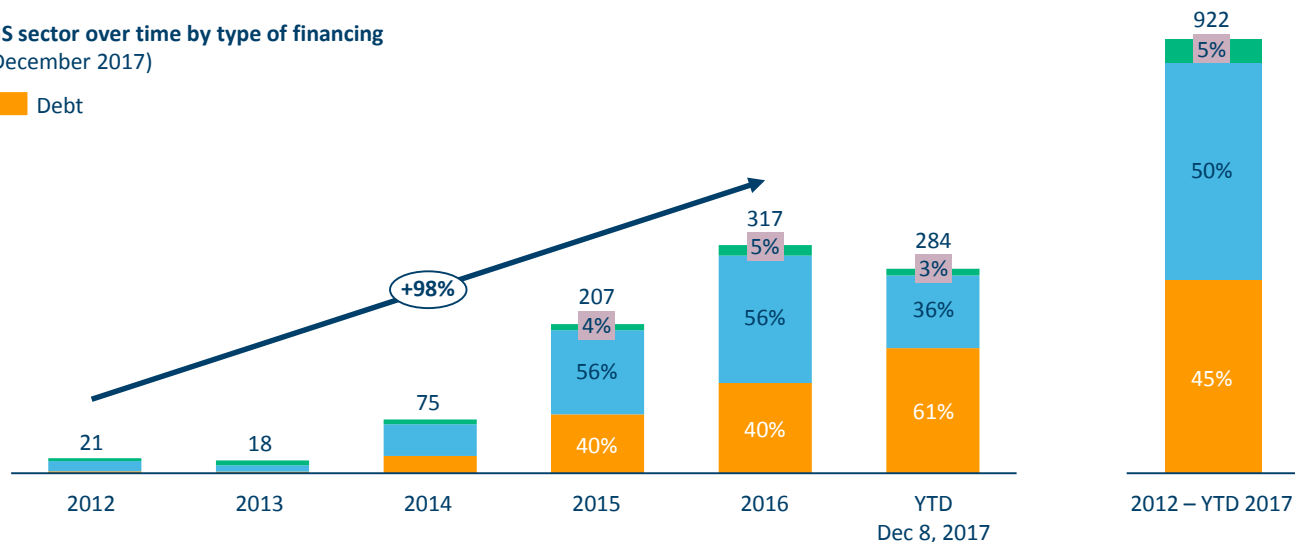


Type and Amount of Capital Attracted to Date

Annual investment in OGS sector over time by type of financing

USD Millions (2012- YTD December 2017)

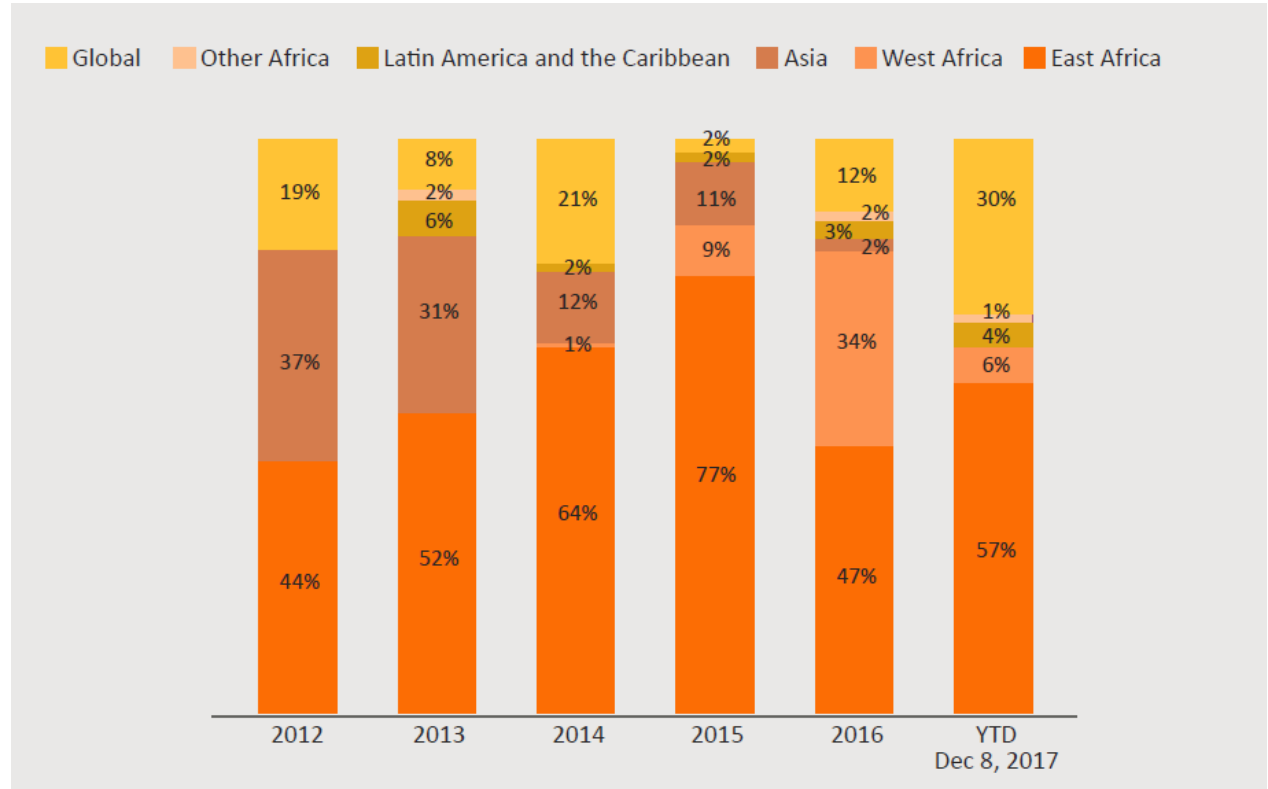
Grants Equity Debt



	2012	2013	2014	2015	2016	YTD Dec 8, 2017
Avg. size of top 5 transactions	2.8	2.4	9.8	21.3	31.7	25.4
Avg. size of overall transactions	1.4	1.0	3.1	5.6	4.0	5.0
Number of transactions	15	18	24	37	79	57

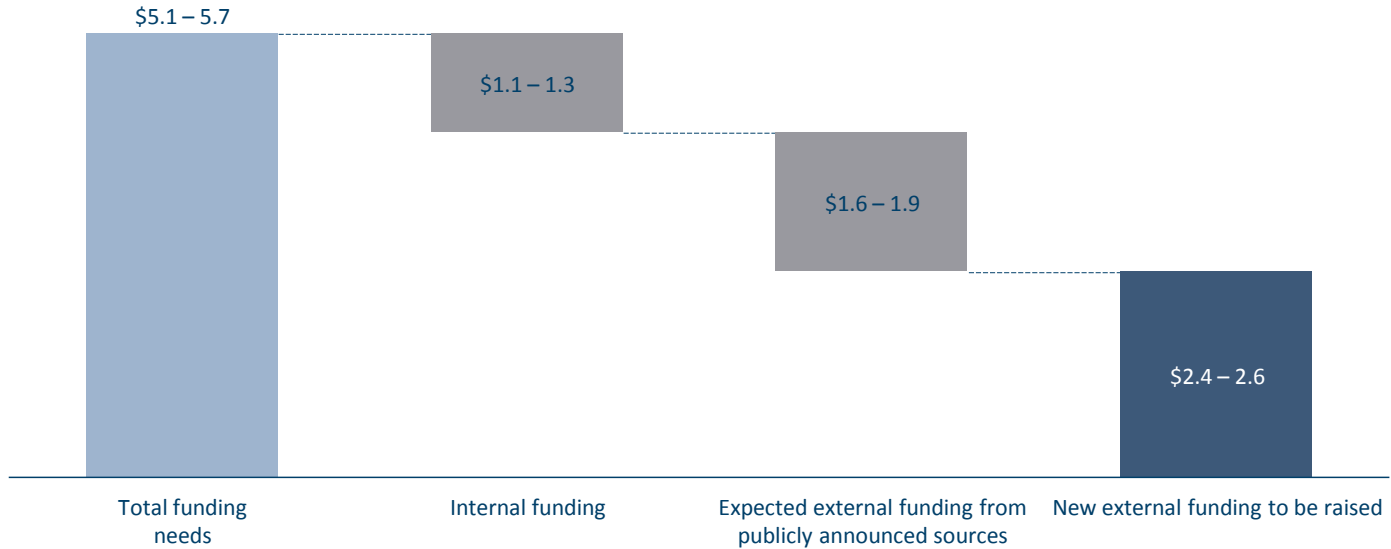
Note: 2017 figures include estimates of the acquisition of Fenix International by Engie and a follow-on investment from a consortium of investors led by Investec Asset Management into Mobisol. This study has not been able to verify the size of these transactions, and estimates that they collectively fall in the range of USD 30-45 million; Source: GOGLA 2018 Deals Database

Funding Raised per Region 2012 - 2017



Estimated Funding Needs 2017 - 2022

Funding gaps
USD Billions (2017-2022)



The Role of Governments

Figure 10: 55 energy access countries answering yes to questions about framework for standalone solutions

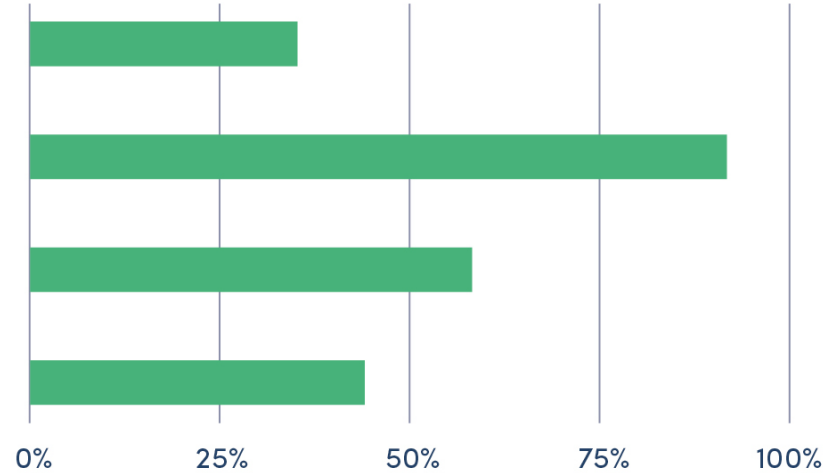
- Source: RISE Database, World Bank

Are there specific financing mechanisms to support operators or consumers?

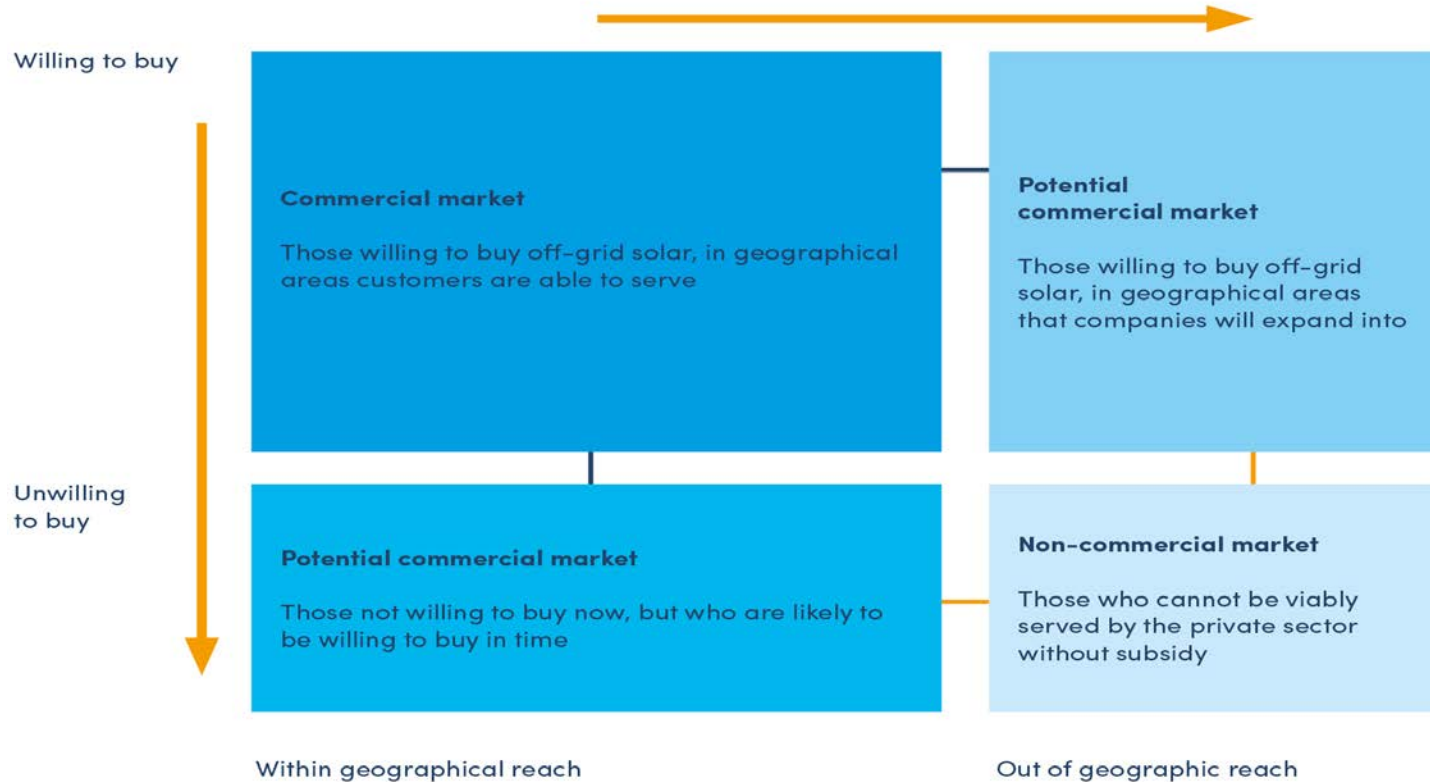
Is there no legal restriction on the price retailers or service providers can charge?

Are there subsidies and/or duty exemptions for standalone systems?

Are there national programs to support the development of standalone systems?



Expanding the Commercial Market



Ways to Deploy Public Funding



There is a clear need for public & private to work together:

- Accelerated market growth
- Intensified geographic expansion
- Support 2nd and 3rd generation companies
- Bridge the viability gap

How to contact us



info@gogla.org



www.gogla.org



+31 304 100 914

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Addressable Market

For 1.5-3Wp pico @ USD25 standard price
(light and phone charging)

