

GOGLA

The Voice of the
Off-Grid Solar Industry



Agenda



1 GOGLA and its members

2 State of the market – sales and impact

3 State of the market - investment

4 The impact of RBFs

5 Reaching 1 billion people

About us



GONGLA is the global association for the off-grid solar energy industry

Our 200+ members provide millions of low-income and climate-vulnerable people with affordable, high-quality products and services; rapidly increasing customers' productivity, connectivity, and resilience.



We represent

GGLA

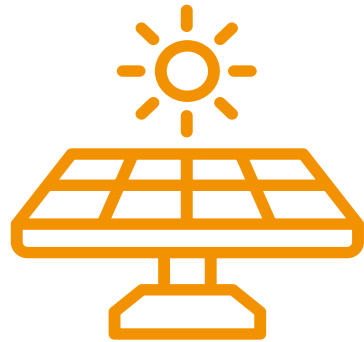
200+

**Off-grid solar and appliance
manufacturers, distributors, and
service providers, plus associate
members like industry investors
and associations**

From 50 countries



Our members play a vital role powering homes and enterprises



Farming



Salons



Fishing



Phone charging



Shops



Offices & ICT



Restaurants



Public institutions



Bars

and many more...

Agenda



1 GOGLA and its members

2 **State of the market – sales and impact**

3 State of the market - investment

4 The impact of RBFs

5 Reaching 1 billion people

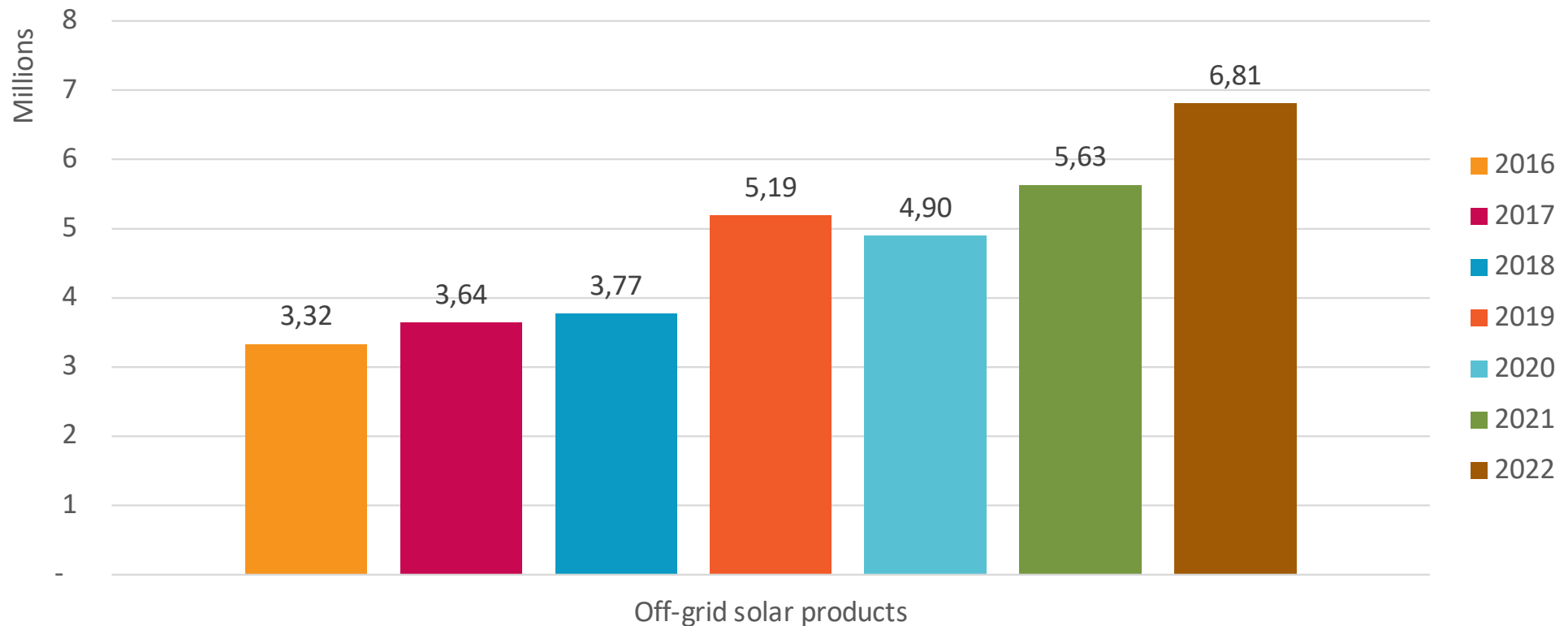
The image shows three people in silhouette against a clear blue sky. They are holding up solar-powered lamps. The person on the left is holding a lamp high in the air. The person in the middle is holding a lamp with both hands, and it is illuminated. The person on the right is holding a lamp out to the side. The overall scene is backlit, creating a strong contrast between the dark figures and the bright sky.

100 million people

today have energy access thanks to off-grid solar energy

Off-grid solar sales volumes 2016-2022 in Sub-Saharan Africa

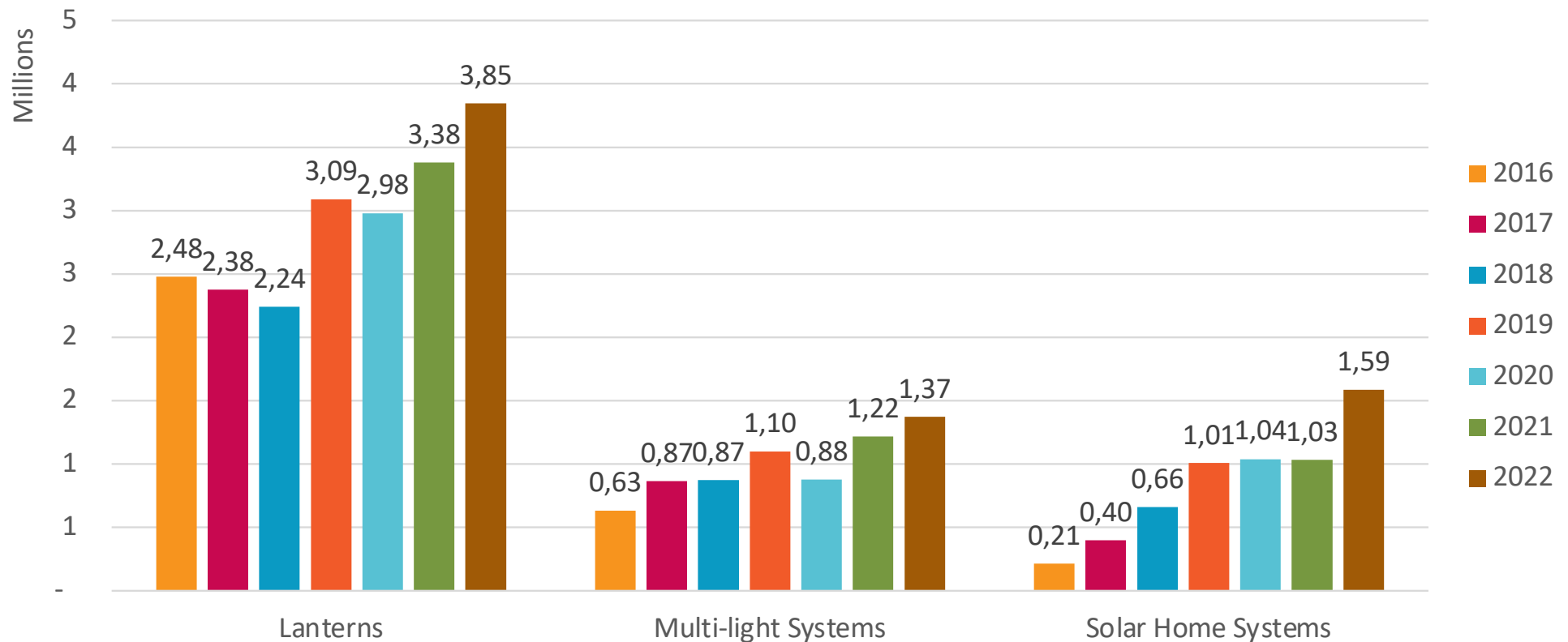
Sales of off-grid solar products in Sub-Saharan Africa have more than doubled since 2016 despite the slowdown caused by the COVID-19 pandemic.



Off-grid solar sales volumes 2016-2022 in Sub-Saharan Africa by category



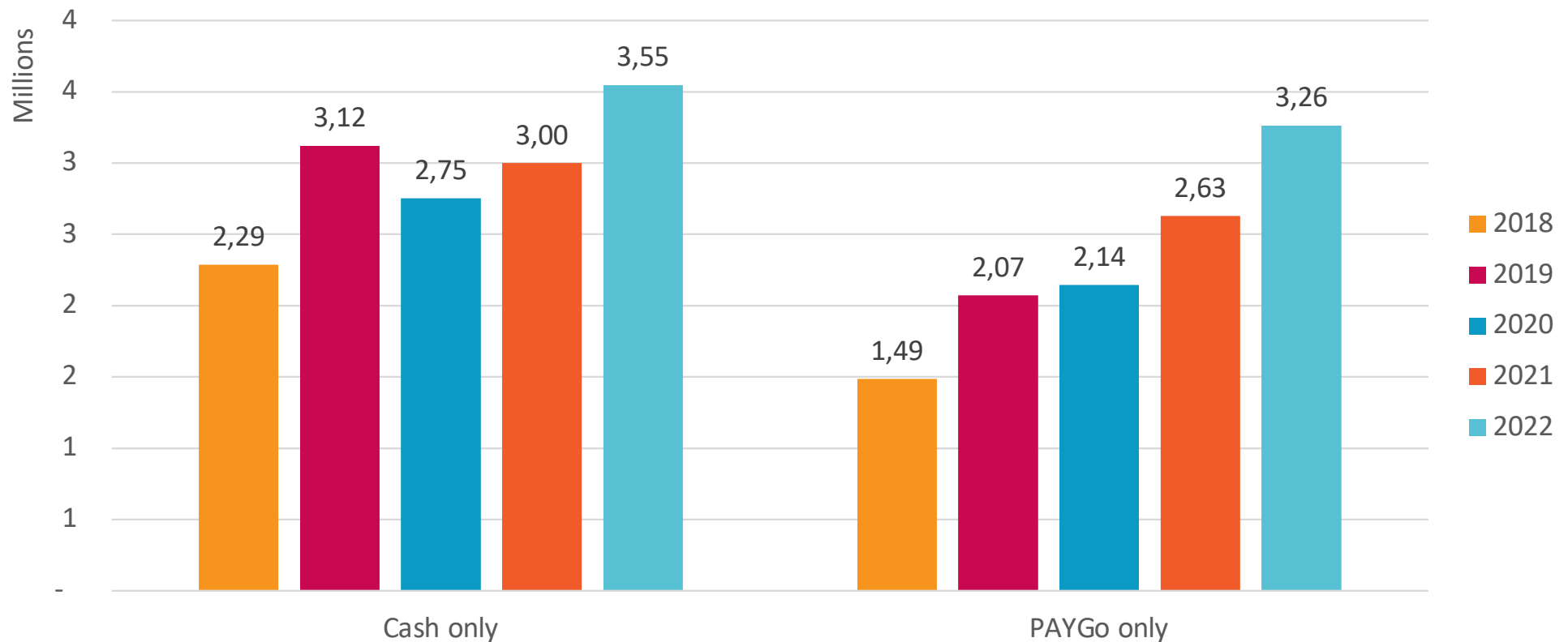
Solar lanterns still represent the majority of sales volumes in Sub-Saharan Africa, but sales of multi-light systems and in particular SHS have grown much faster since 2016.



Off-grid solar sales volumes 2016-2022 in Sub-Saharan Africa by model



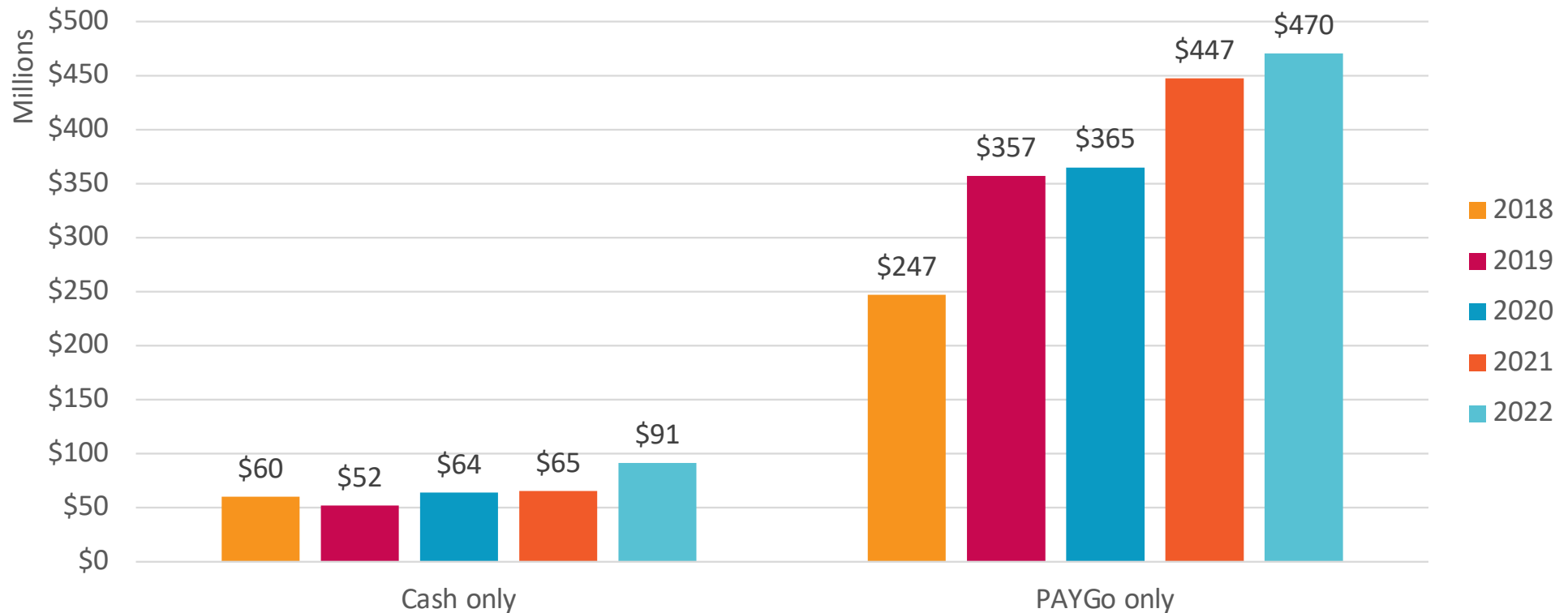
Since 2016, cash sales of off-grid solar products have grown by 55%.
Over the same period, PAYGo sales have more than doubled.



Off-grid solar sales volumes 2016-2022 in Sub-Saharan Africa by model



The estimated total value of PAYGo products sold is significantly higher to that of cash sales. This is both due to the nature of PAYGO and the fact it is often used to make larger products with higher level of service affordable.



Some of our impacts



101
Million

**People currently
served**



13.5
Billion

**Energy savings for
households**



7.4
Billion

**Additional
revenues for
end-users**



2.6
Million

**Enterprises
supported**



94
Million

**Metric tonnes
CO2e avoided**

*Impact data from GOGLA members and affiliates only, representing approximately 1/3 of the off-grid standalone sector. Data until June 2022



My income has improved so I can use that amount for my family like buying food or exercise books for my children.



Off-grid solar customer
60 decibels research
Why Off-Grid Energy Matters

Key diversification trends



PAYGo everything

- Smartphones
- Motorbikes
- Cookstoves

Larger systems

- Solar generators
- Back-up systems

PUE

- Irrigation
- Cooling
- Agro-processing
- Micro Enterprises

C&I/B2G

- C&I
- Healthcare electrification
- School electrification

Financial services

- Cash loans
- Insurance

Focus on PUE across the industry

GGLA



**\$32
Million**

PUE-focused deals
raised in 2022



**7.4
Thousand**

Refrigeration units
sold in 2022



**24.6
Thousand**

Solar water pumps
sold in 2022

Agenda



- 1** GONGLA and its members

- 2** State of the market – sales and impact

- 3** **State of the market - investment**

- 4** The impact of RBFs

- 5** Reaching 1 billion people



INVESTMENT IN OFF-GRID SOLAR REACHES NEW RECORD OF \$746M IN 2022

SIMON COCKING × APRIL 17, 2023

BUSINESS CUTTING EDGE FUTURE TRENDS INNOVATION IRELAND TECH NEWS



Solar product sales rose by 450% in Nigeria within 6 years

Chinedu Ndigwe – May 7, 2023

Global off-grid solar sector investment up 63% in 2022

By [Simon Yuen](#)
April 12, 2023

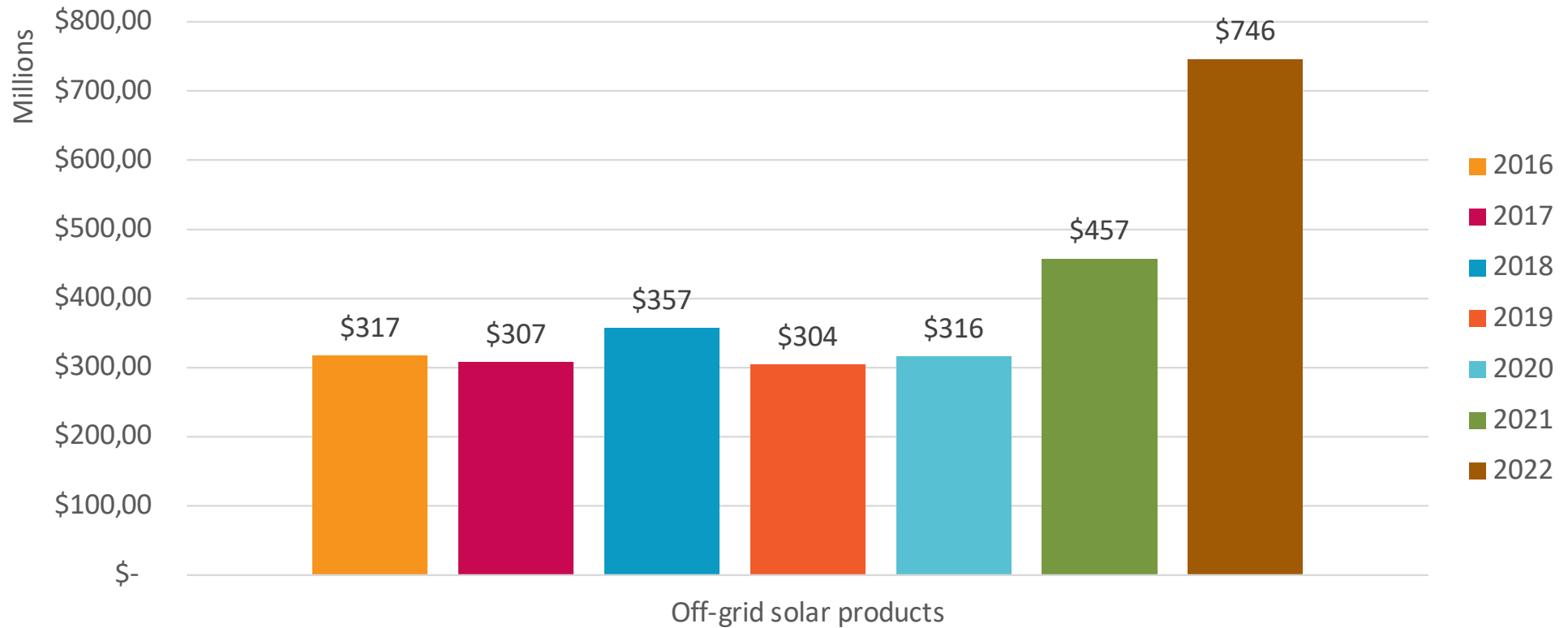
New Global Off-Grid Solar Market Report shows record-breaking sales of solar energy kits

Sales volumes have surpassed those of 2019, showing a bounce-back from COVID TV, refrigeration units and solar water pump sales grew compared to the first half of the year

Global investment flow into off-grid solar companies 2016-2022



After a long period of stagnation, investment flows into the sector have accelerated after the pandemic, mostly due to industry leaders accessing new forms and new scales of investment.



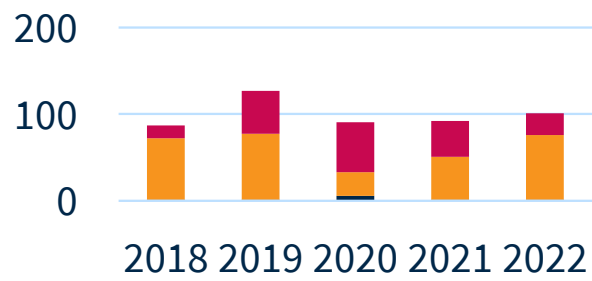
Investment Raised (\$m)



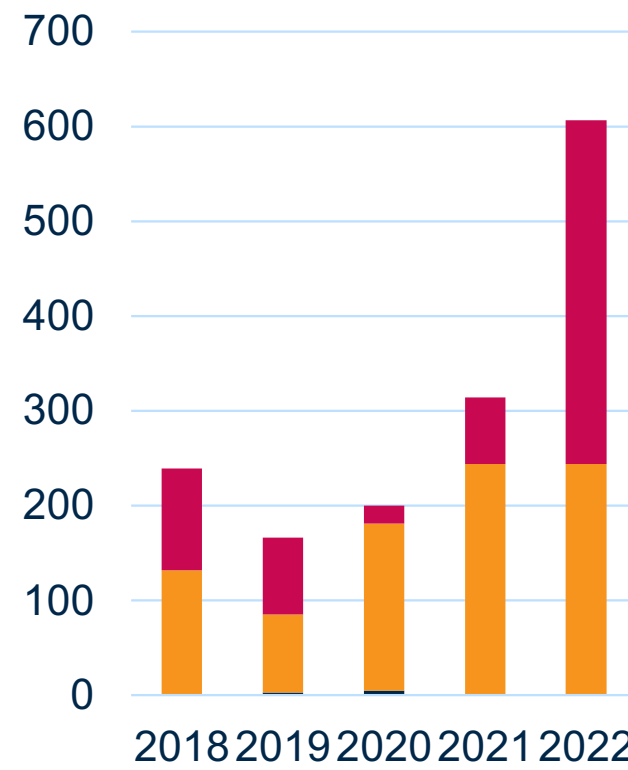
Seed



Start-up



Scale-up



■ GRANT ■ DEBT ■ EQUITY

Agenda



1 GONGLA and its members

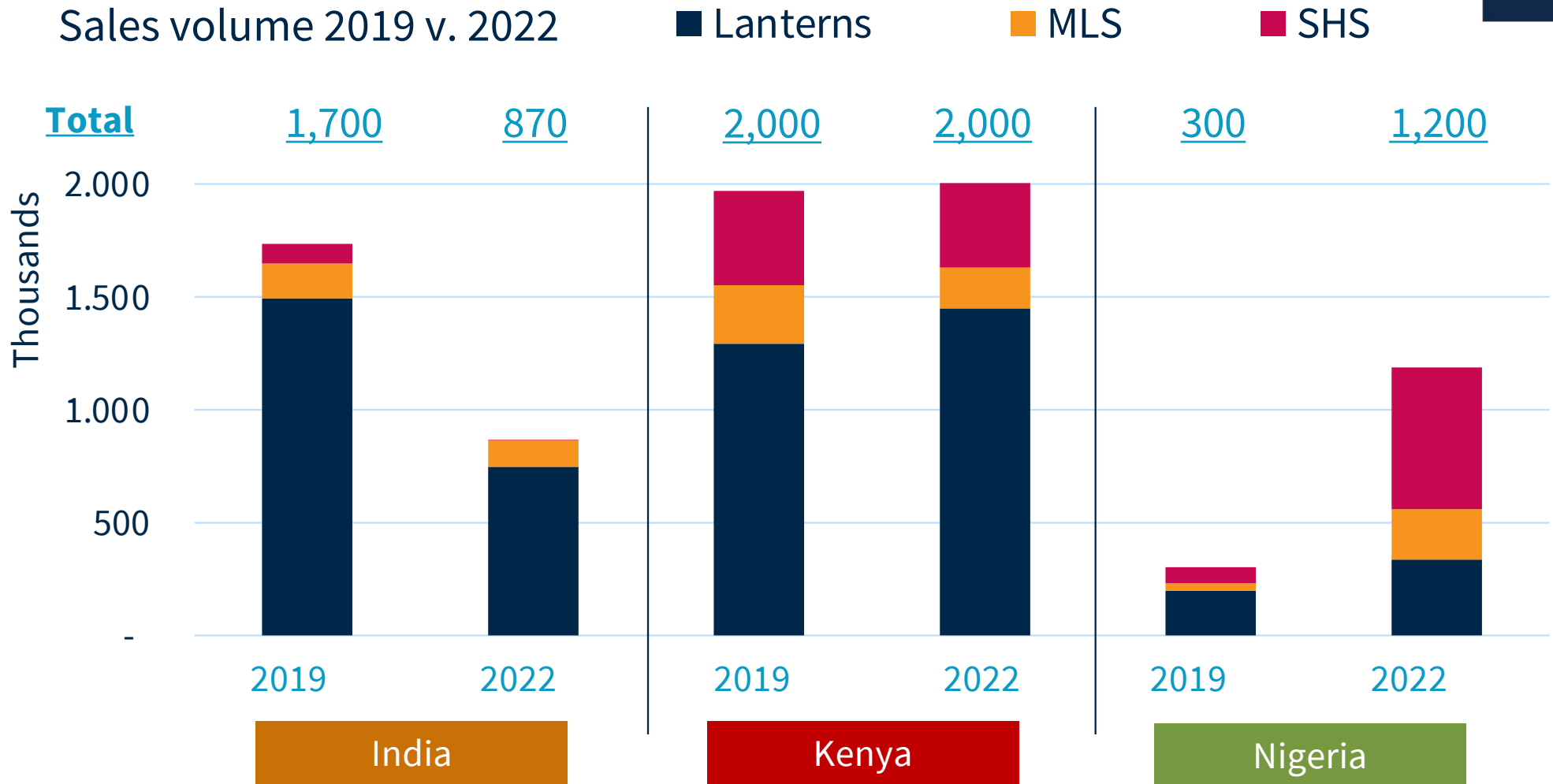
2 State of the market – sales and impact

3 State of the market - investment

4 **The impact of RBFs**

5 Reaching 1 billion people

Key markets have evolved in different ways



RBF funds are growing



**\$211
Million**

**Disbursed or
currently
disbursing through
RBFs since 2013**



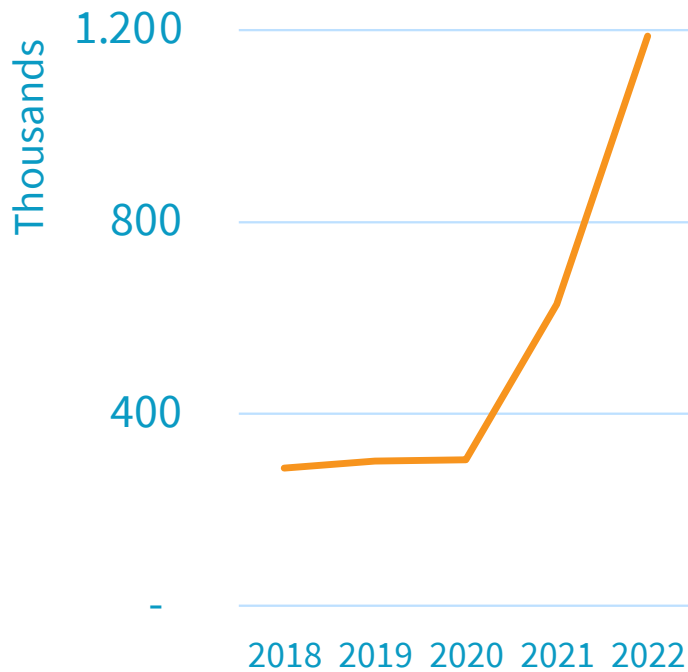
**\$100
Million**

**Came on stream
since 2020**

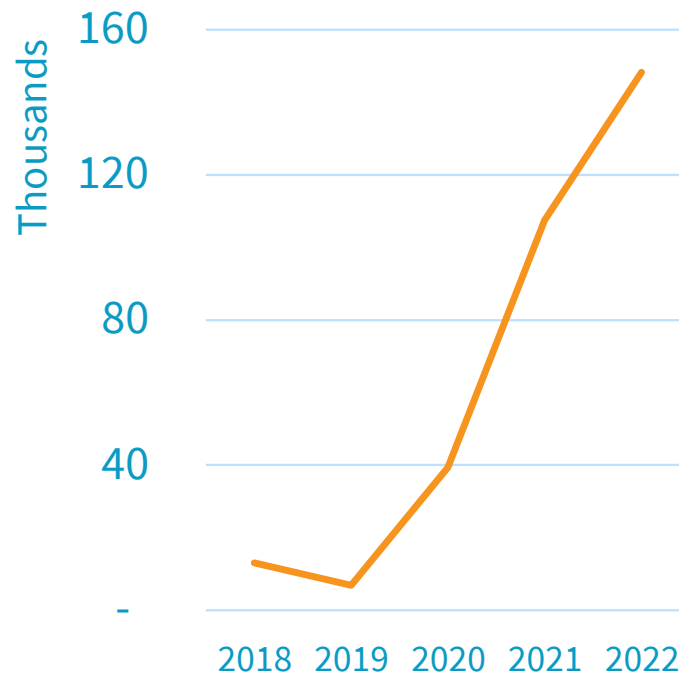
RBF schemes have transformational potential



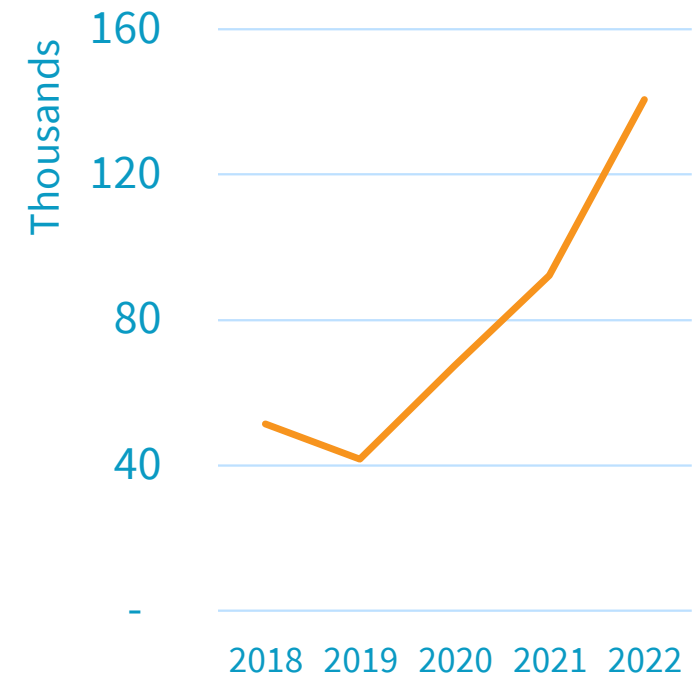
Sales Nigeria



Sales Mozambique



Sales Madagascar



Agenda



1 GONGLA and its members

2 State of the market – sales and impact

3 State of the market - investment

4 The impact of RBFs

5 **Reaching 1 billion people**

The path to universal energy access

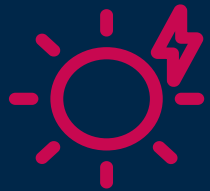
1 billion people

Electrified by off-grid solar
solutions to reach SDG7



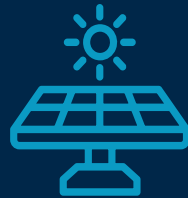
Energy access impacts to Power 1 Billion Lives

GOGLA



550 Million

People reach Tier 1+
energy access



260 Million

Enjoy strengthened
energy services



190 Million

Benefit from
productive use of
renewable energy

How do we get there

GOGLA



Reach the
remaining
unconnected



Replace products
for existing users
moving them up
the energy ladder



Back-up solar
solutions for
weak-grid
environments



Improve product,
consumer
protection, credit
risk management

What we do

To enable sustainable businesses and accelerate energy access, we provide market insights, standards and best practice, and advocate for catalytic policies, programmes and investment.

How do we do this?



Influence policies & programmes

We have regional representatives and working groups to gather industry insights that can shape smart and effective energy policies and programmes

- Our Regional Representatives work on issues that greatly impact energy access like **VAT exemption in Kenya**
- We create dialogue within the **Community of Champions**, representing policymakers whose priority is energy access
- We coalesce the industry around key topics such as **End-User Subsidies** and **Productive Use of Energy**



Represent a united voice

GOGLA

GOGLA has the authority to represent the off-grid solar energy industry's voice and dialogue with multiple stakeholders

- We have the insights from the industry to **inform policymakers** working on fair energy policies
- We are present at international **forums like COP** that shape policies affecting the industry
- We participate in global initiatives like the **UN Energy Compacts**, showing the industry's commitment to powering 1 billion lives



Facilitate connections

We organize events to connect investors, development partners, policy makers and industry members

- Our flagship events like the [Global Off-Grid Solar Forum & Expo](#) gather hundreds of attendees, and connection opportunities
- Through [GOGLA Bridge](#), we showcase financing opportunities to companies that require additional investment for growth
- We [communicate](#) on our members' groundbreaking work, highlighting their impact to thousands of relevant stakeholders



SPOTLIGHT: Global Off-Grid Solar Forum & Expo

GOGLA



The world's leading meeting place for the sector, promoting knowledge exchange & networking, showcasing off-grid solar products and services

- 1000+ attendees at the last edition in Kigali
- Presence of stakeholders from the public sector, investors and companies, fostering multistakeholder deals
- Plenary sessions, product exhibition, specialized breakout and parallel sessions

Share market insights

Our expert team gather and share data and insights that offer a full picture of the industry and its impacts

- We publish the [Global Off-Grid Solar Market Report](#), the [Investment Database](#), and the [Off-Grid Solar Market Trends Report](#), among others
- We are a **trusted partner** for the industry to share data on sales, investment, performance, operations, impact and more
- Our data is used as a **source by international institutions** and development partners like IEA

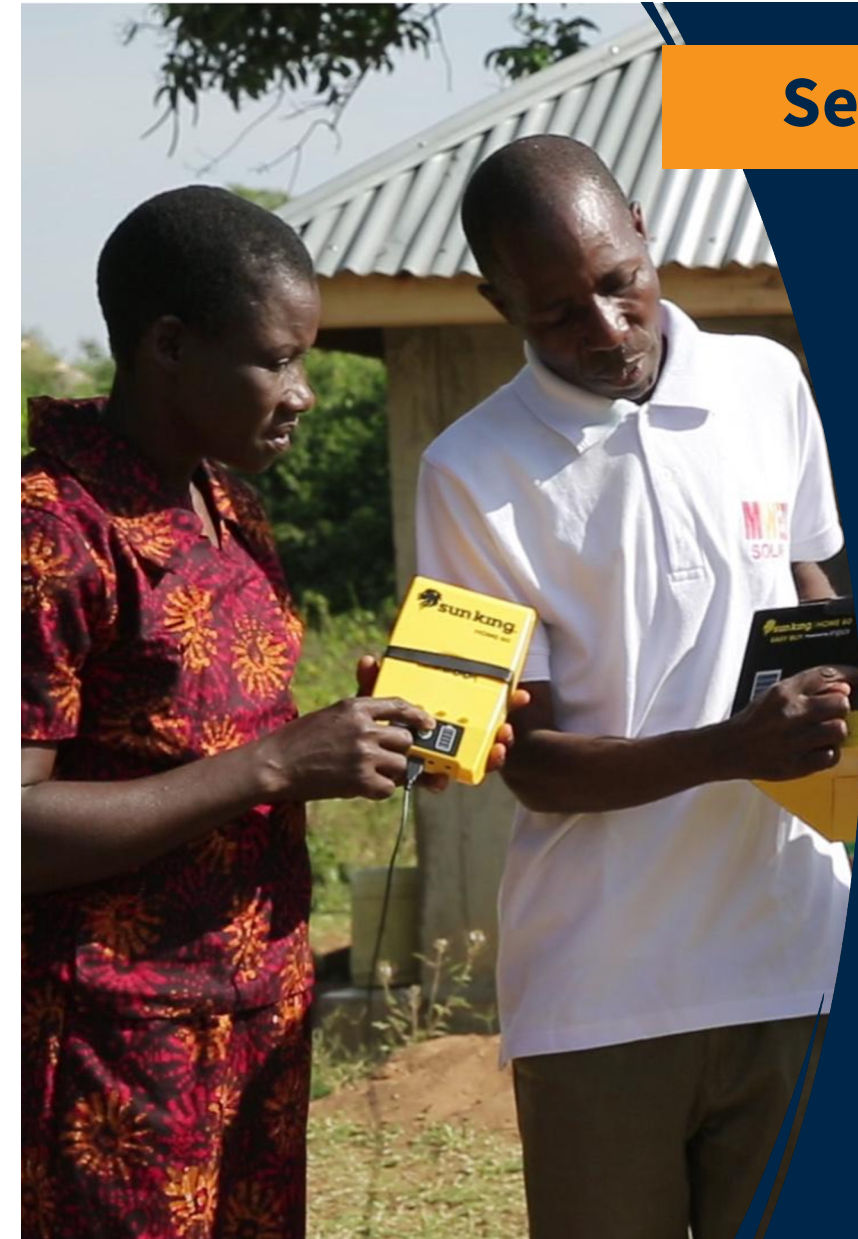


Set industry standards

GOGLA

We develop standards, guidelines, best practices, and opinions with our members, to protect consumers and the industry

- Our **Consumer Protection Code** helps companies assess and demonstrate their impact and improve practices as needed
- **Impact Metrics** to estimate the industry's impacts consistently, clearly and coherently
- The **e-waste toolkit** is a tangible result of our Circularity work, aimed at reducing resource usage and creating a closed-loop system



We work with a network of partners





GOGLA can help inform about industry sector news, create policies and industry standards that help protect consumers and quality manufacturers from counterfeits, and connect members to new opportunities emerging in various countries worldwide



Ned Tozun

CEO

d.light



Off-grid solar is another child going to college. A seamstress powering her sewing machine. A village socializing at night. An affordable solar system. A policy in place to free millions from toxic kerosene. Clean air. A way to pay the bills. Money in the bank. A change. Optimism. Acceleration. It's doing what needs to be done.

Our Members have the facts, the economics, the people, the technology and the energy of the future.



Let's work together!

GOGLA

Thank you

info@gogla.org

www.gogla.org

