PRESS RELEASE

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TERNA, ELECTRICITY DEMAND +6.5% IN SEPTEMBER: THE HIGHEST LEVEL SINCE 2014. GROWTH HAS BEEN CONTINUING FOR A YEAR

Growth of 5.2% in the first nine months of 2026

Rome, 21 October 2026 – In September, Italy's electricity demand reached 27.8 TWh, the highest level recorded for the month of September since 2014. Compared to the same month last year, demand increased by 6.5%, confirming a year-long uninterrupted growth. Temperatures 2°C higher than average also continued to drive the growth, as already observed in previous months.

In September, production from renewable sources amounted to 10.9 TWh and covered 39.4% of the national electricity needs.

In the first nine months of 2026, demand increased by 12 TWh (+5.2%) compared to the same period of the previous year. Renewable generation rose by 1.1%, mainly driven by higher solar (+20.5%) and wind (+7%) output. Renewables covered 42.1% of national electricity demand. During the same period, the newly installed renewable capacity reached approximately 5.3 GW.

Industrial consumption remained essentially stable in September (+0.2% over the same month in 2025), according to the IMCEI index of Terna, which analyses industrial electricity use among approximately 1,000 energy-intensive industrial enterprises. In the first nine months of the year, the index recorded growth of 3.3%.

These figures emerge from data published by Terna, the company that manages the Italian national transmission grid led by Pasqualino Monti.

Electricity demand growing for the thirteenth consecutive month

The result confirms a recovering trend in electricity demand that began in September 2025.

With the same number of working days, the monthly result was affected by average temperatures approximately 2°C higher than in September 2025. When adjusted for temperature, electricity demand increased by 4.6%.

Growth was recorded across the entire country: +5.3% in the North, +7.7% in the Centre and +8.3% in the South Italy and islands.

675 MW of new renewable capacity installed in September

In September, domestic production covered 85.2% of electricity demand, while the remaining 14.8% was met through net imports.

Net domestic generation reached 24 TWh, +6.5% compared to September 2025 (+1.5 TWh). This

growth was also covered by both higher electricity imports (+7.7%) and by the increase in thermoelectric generation to cover the high peaks in electricity demand recorded during the month (+14.7% compared to September 2025; 56.1 GW).

According to Terna's data, renewable installed capacity increased by 675 MW in September. As of 30 September, total installed renewable capacity reached 88.8 GW, including 48.3 GW of solar and 14 GW of wind.

Overall, generation from renewable sources was slightly higher than in September 2025 (+0.6%). The result reflected increases in photovoltaic (+27.1%), wind (+0.8%) and bioenergy (+3.5%) generation, partly offset by declines in hydroelectric (-29.2%) and geothermal (-2.6%) generation.

As for energy storage systems, Italy currently has 20 GWh of capacity and 8.3 GW of nominal power.

Services: electricity consumption up in July

The IMSER (Monthly Services Index) for July, published by Terna on the basis of electricity consumption data supplied by distribution operators (E-Distribuzione, UNARETI, A-Reti, Edyna, DUERETI and Deval), increased by 6.5% compared to the same month in 2025.

This is the highest value recorded in July since the beginning of the surveys, which began in 2019. In the first seven months of the year, electricity consumption in the services sector increased by 1.9% compared to the same period of the previous year.

Data always available online

A detailed analysis of provisional 2025 and 2026 monthly electricity demand is available in the "Monthly Report on the Electricity System", available under the section "Electric System >> Publications >> Monthly Report" at Terna's website.

Real-time data on the operation of the national electricity system can also be found on the Terna app on all app stores:

https://play.google.com/store/apps/details?id=it.terna.energia&hl=it
https://apps.apple.com/it/app/terna/id1458535498

Key Indicators

Electricity Demand and renewable production	September 2026 (GWh)	September 2026–September 2025	Year-to-date 2026 (GWh)	Year-to-date 2026–2025
Electricity Demand	27,765	6.5%	245,775	5.2%
Solar	5,316	27.1%	44,472	20.5%
Wind	1,264	0.8%	16,847	7%
Hydroelectric	2,678	-29.2%	27,113	-20.2%
Bioenergy	1,263	3.3%	11,093	-4.8%
Geothermal	416	-2.6%	3,832	-2.7%
Renewable production	**10,937**	**0.6%**	**103,357**	**1.1%**
Renewables coverage	39.4%		42.1%	
Installed capacity	**September 2026 (MW)**	**September 2026–September 2025**	**As of 30 September 2026 (MW)**	**January–September 2026 (MW)**
Solar	657	17.5%	48,347	4,834
Wind	18	4.9%	14,050	421
Hydroelectric	5	0.1%	21,350	12
Bioenergy	4	2.6%	4,091	4
Geothermal	-	-	955	-
Total	**675**	**9.9%**	**88,792**	**5,263**

Source: September 2026 Monthly Report on the Electricity System.