

Power Generation: China is now the dominant factor in global energy production

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Abstracts

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SUMMARY

An examination of the role China now plays in the global power generation industry is useful because the vast scale decisions are taken on have impacts that are felt far beyond the country's borders. Recently installed as the leading energy consumer, overtaking the United States, and soon to be the globe's largest economy, Chinese policy and investment wields extensive influence over the global power generation industry. Such is the extent of government spending power and development of power generation capabilities, China is now the dominant factor regarding the use of coal, both at home and abroad, renewable energy and in dealing with soaring power demands made by an increasingly affluent and aspirational population.

KEY HIGHLIGHTS

A report published by UN Environment, the Frankfurt School-UNEP Collaborating Center, and Bloomberg New Energy Finance found since 2004 global investment into green energy sources totaled \$2.9tn. Since 2016 investment expanded by 31% according to the report; elsewhere in Europe and the United States spending declined by 36% and 6% respectively. The growth in spending compared to elsewhere in the world is reflective of the relative economic success of China.

According to the Natural Resources Defense Council, a US based non-profit environmental advocacy group, Chinese institutions are the largest investor of

overseas coal power-plants. Approximately \$15bn was ploughed into coal power-plants between 2013 and 2016, mostly through international development funds. Throughout the Asia-Pacific region China is the dominant investor, accounting for half of Vietnam's total foreign coal finance. International expansion was initiated by a need felt by Beijing to develop international influence and ties with other countries to be used as leverage in other facets of diplomatic relations. China often provides loans to Chinese investors to facilitate the construction of new power plants via bilateral agreements with other governments. In going elsewhere China has to some extent alleviated the overcapacity problem in coal-fired power-plants - although the reasons for overcapacity are legion

Many governments have welcomed coal-fired power station construction as a means of producing comparatively cheap energy. Despite agreements such as the Paris Climate Change Accord (in which governments around the world agreed to limit carbon emissions) the allure of cheap energy remains strong. The plants being built are not regarded as being efficient and rely upon technology that has been around for quite some time.

Since taking the industry overseas, Chinese companies have become very efficient at installing the power plants and getting them online in a short space of time. However, the near inevitable impact of cheap energy on the more expensive renewable alternatives is that the reduction in cost of wind turbines and other technologies witnessed in recent years is now of much less significance.

SCOPE

Examine what's happening in the power generation industry at present.

See how different technologies are adapting to a new business environment.

Learn which energy generation technologies are the strongest at present and the best option for countries.

Analyse the big trends in the industry and the players capitalising on them.

REASONS TO BUY

What is happening in the power generation industry?

What are the most important new technologies?

Which countries are pushing new developments?

What power sources are most attractive at present?

How can countries meet their carbon emissions targets?

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Catalyst

Summary

China is now the dominant factor in global energy production

Vast spending on renewable power establishes China as leading global 'green energy' player

Having expanded rapidly, solar power now faces multiple problems

China continues to invest in coal overseas, granting fossil fuels a long-term future

Exporting of coal-fired power plants is influencing the spread of green energy production

Coal will remain central to Chinese power generation for decades to come despite overcapacity problems

Rising domestic demand is forcing up power generation

China is the most important player due to enormous power requirements and soaring demand

Consumers are living increasingly energy intensive lives, driving demand for more power

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