

ENERGY TRANSITION DIALOGUES DAILY BULLETIN



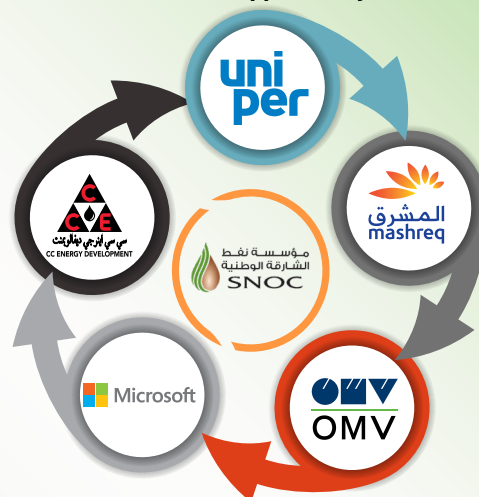
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THURSDAY /// MAR 4th /// 2021

TOP NEWS THIS WEEK

- Emissions Rebound to Pre-Lockdown Levels
- UBS: Tech Stocks Essential to ET
- US Sets Social Cost of Carbon at \$51
- H2 Green Steel's "Fossil-Free Process"
- Bitcoin's Vast Energy Use
- KSA Offers EU Green Hydrogen by Pipeline
- EU Banks to Publish 1st 'Green' Yardstick
- API Weighs Support of Carbon Pricing
- Joint Green Tech Investments in UAE, Israel?
- Airbus Exploring Hybrid-Electric Tech

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TODAY PODCAST THURSDAY /// MARCH 4th



Andrew Rippon
Founder
Thrupny



Francisco Benedito
Chief Executive Officer
ClimateTrade



Tanzeed Alam
Managing Director
Earth Matters

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HYDROGEN FULL COURT PRESS

Andrew Bedford

Director – Advisory & Energy Transition, KBR

Monday /// March 8th /// 12:00 (UAE)



ENERGY TRANSITION DIALOGUES EXCLUSIVE



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“Everybody must understand what green hydrogen is – and that it’s valued correctly. We need regulations and marketplaces.”

David Hart

Director, E4tech



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EXCLUSIVE SERIES VIEWS YOU CAN USE



Dr. Ning Lin
Chief Economist - Bureau of Economic Geology
The University of Texas at Austin

Is China going to be the biggest importer of the US' LNG? The answer is probably: no! The US' LNG will mainly focus on the Far East, South Korea, and Japan, given the fact that they have contracts already and it is geographically closer. At the same time, China is going to take a bigger share than we originally expected. As far as we can tell, the effect of the trade war will subside this year.

The LNG Gap

There is also a big capacity gap, which mainly comes from LNG import terminals. China has about 22 LNG receiving terminals, which are equivalent to 100bcm. That number has to be at least 100 – 150bcm when it comes to capacity. So, to fill this gap, it needs 150% more LNG import terminals. Even if we account for the country's domestic production, it is still too small to compensate for the growing demand.

Natural Gas is set for growth

Natural gas is strategically very important to China's energy transition plan. China had a severe lockdown in the first quarter of 2020, which took a serious toll on industrial and commercial sectors, mainly natural gas. But before mid-2020, China had about 80% of people returning back to work. Furthermore, the National Bureau of Statistics of China came out with figures that showed that gas had 1.5% of growth in the first half of 2020. It was very flat, without the usual growth, but still positive. Altogether, growth of natural gas is expected to come back to normal, potentially with some stronger growth this year. ■

**Paraphrased comments*

Full Interview HERE



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