

# Energy Transition Dialogues

## DAILY BULLETIN



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WEDNESDAY /// APRIL 6<sup>th</sup>

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- CHINA IS GUNNING FOR SUPREMACY IN GLOBAL GREEN HYDROGEN RACE
- EUROPE'S GAS BRIDGE TO ENERGY TRANSITION IS CRUMBLING
- ENERGY, FOOD SECURITY PUSHES TRANSITION DOWN POLITICAL AGENDA IN OSLO
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#### A CARBON BRIEF REPORT

## China Quietly Releases Energy Roadmap for Next 5 Years

On March 22<sup>nd</sup>, Beijing quietly dropped its 14<sup>th</sup> five-year plan (FYP) for the energy sector, a much-anticipated document that sets the tone for the industry's development from 2021 to 2025. The plan came on the same day as China's vice premier stressed the importance of the "clean and efficient" use of coal.

**WHAT:** China's central government published the long-awaited 14FYP for the energy sector on 22 March, laying out a general direction – as well as specific tasks and goals – for the energy system for the next five years. The overarching objective of the plan is to "accelerate" the development of a "modern energy system" – which, according to a government spokesperson, stands for a "clean, low-carbon, secure and highly efficient" energy system. The plan was jointly published by the National Development and Reform Commission (NDRC), the state economic planner, and the National Energy Administration (NEA), the state energy regulator.

**KEY POINTS:** The document doubles down on recent government instructions of enhancing energy efficiency by setting quantitative targets on energy production (especially for oil and gas) and reasserting the role of coal and coal power. It also underscores the urgency of speeding up the "low-carbon" transition to adapt to the "large-scale" development of renewable energy. A few key targets are missing, including caps for total energy consumption and coal consumption, as well as projected total electricity consumption. However, Carbon Brief understands there are two new targets: one requires the ratio of non-fossil power generation to reach "about" 39% in the total power generation by 2025; the other stipulates that electric power account for "about" 30% of final energy consumption by 2025. (According to China Electricity Council, a state-approved trade association, non-fossil power generation made up for 34.6% of the total power generation by the end of 2021.)

**MAIN GOALS:** The document lists five main goals. To summarise, it stipulates that the country should



strive towards "more safe and solid" energy security, achieve "remarkably effective" energy transition, "significantly" raise energy efficiency, "obviously" enhance innovation capabilities and "continuously" improve general energy service levels.

**TARGETS:** The plan commands that by 2025, China should have the "comprehensive energy production capacity" of "above" 4.6bn tonnes of standard coal equivalent (tce) annually as well as producing 200m tonnes of oil and more than 230bn cubic metres of gas a year. (These figures are not new. This government document from last December explained how they were calculated. It also said that the "comprehensive energy production capacity" means the production capacity of primary energy including coal, oil, gas and non-fossil energy. The document also projected China's total energy consumption to reach 5.45-5.5bn tce in 2025. It estimated the "domestic self-sufficiency" rate to be at 84% in 2025 and the domestic energy production to be "above" 4.6bn tce. Production of "raw coal" and energy were expected to be "about" 4.2bn tonnes and 4.7bn tce, respectively, in 2025. None of those figures appears in the final 14FYP for energy.) The new energy plan also notes that the total installed capacity for power generation should reach "about" 3,000 gigawatts (GW), which Bloomberg described as "a huge increase".

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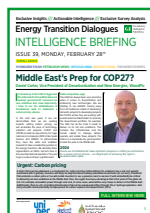
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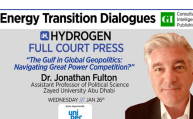
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