

The Greenpeace logo is displayed in a white, bold, sans-serif font. It is positioned in the upper right quadrant of the slide. The background is a solid green color with several thin, white, curved lines that sweep across the middle of the slide, creating a sense of motion or energy.

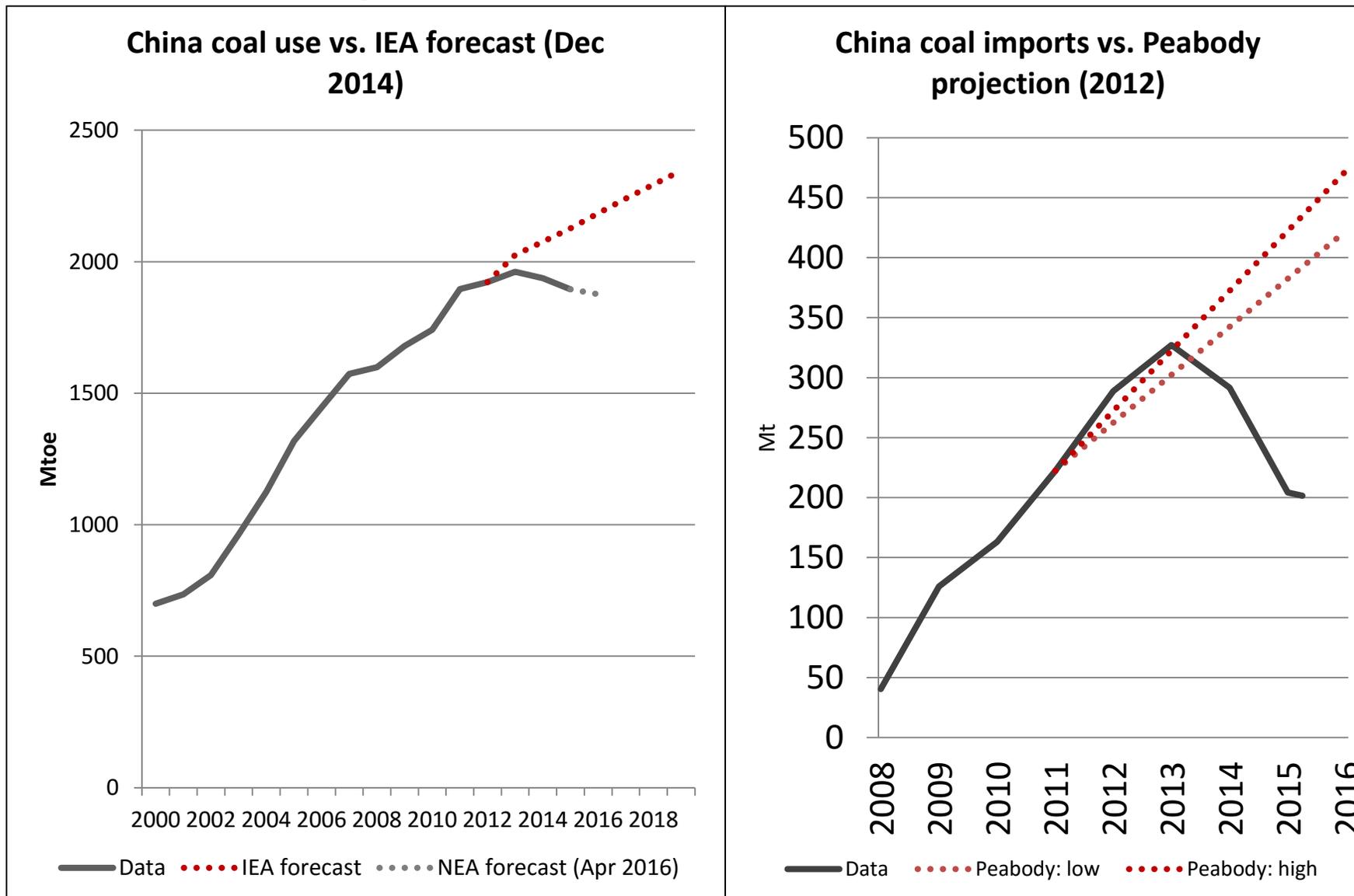
GREENPEACE

New trends in China energy consumption

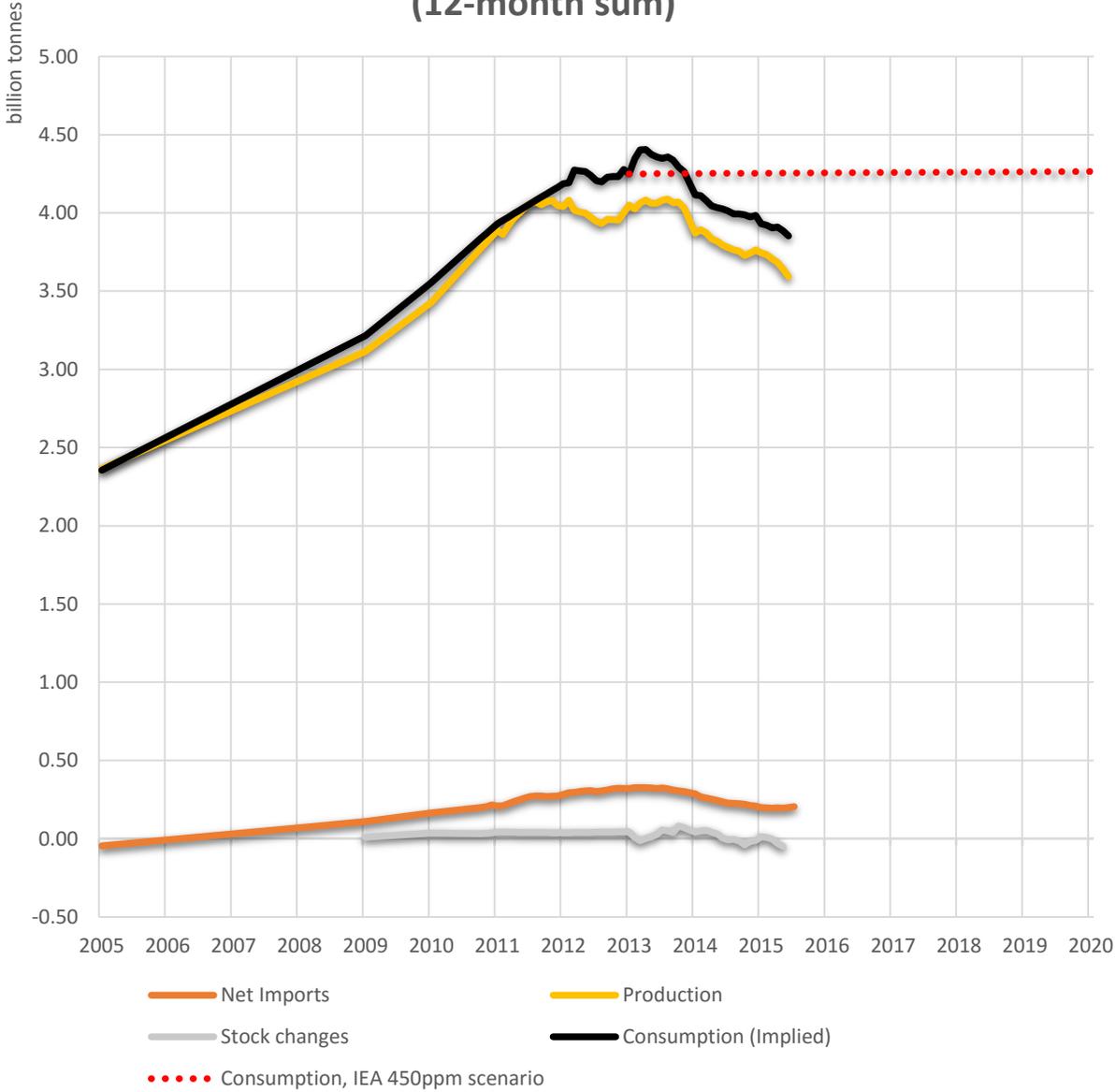
Lauri Myllyvirta

Coal and air pollution expert

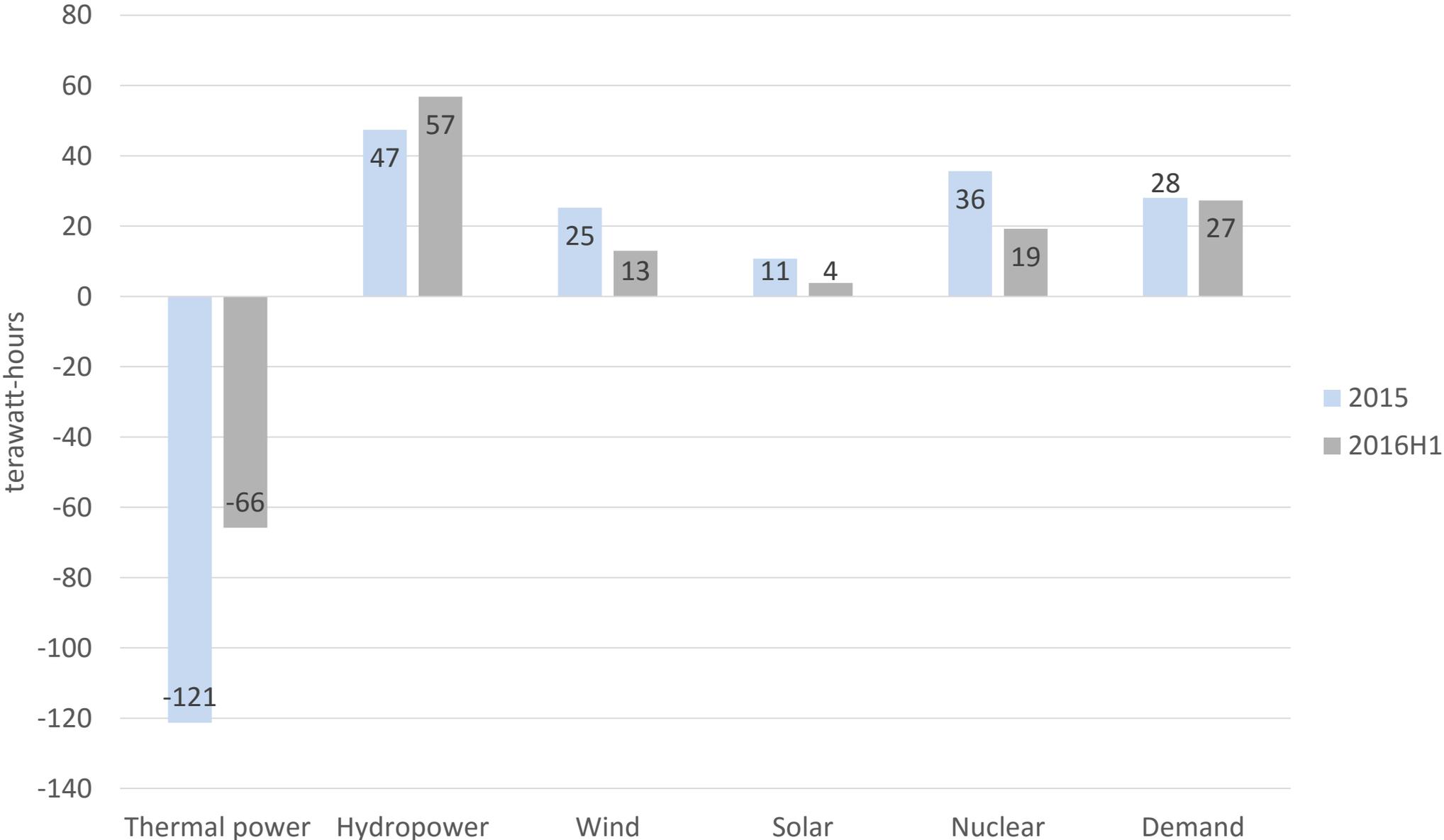
Coal consumption: Outlook changed completely in a few short years



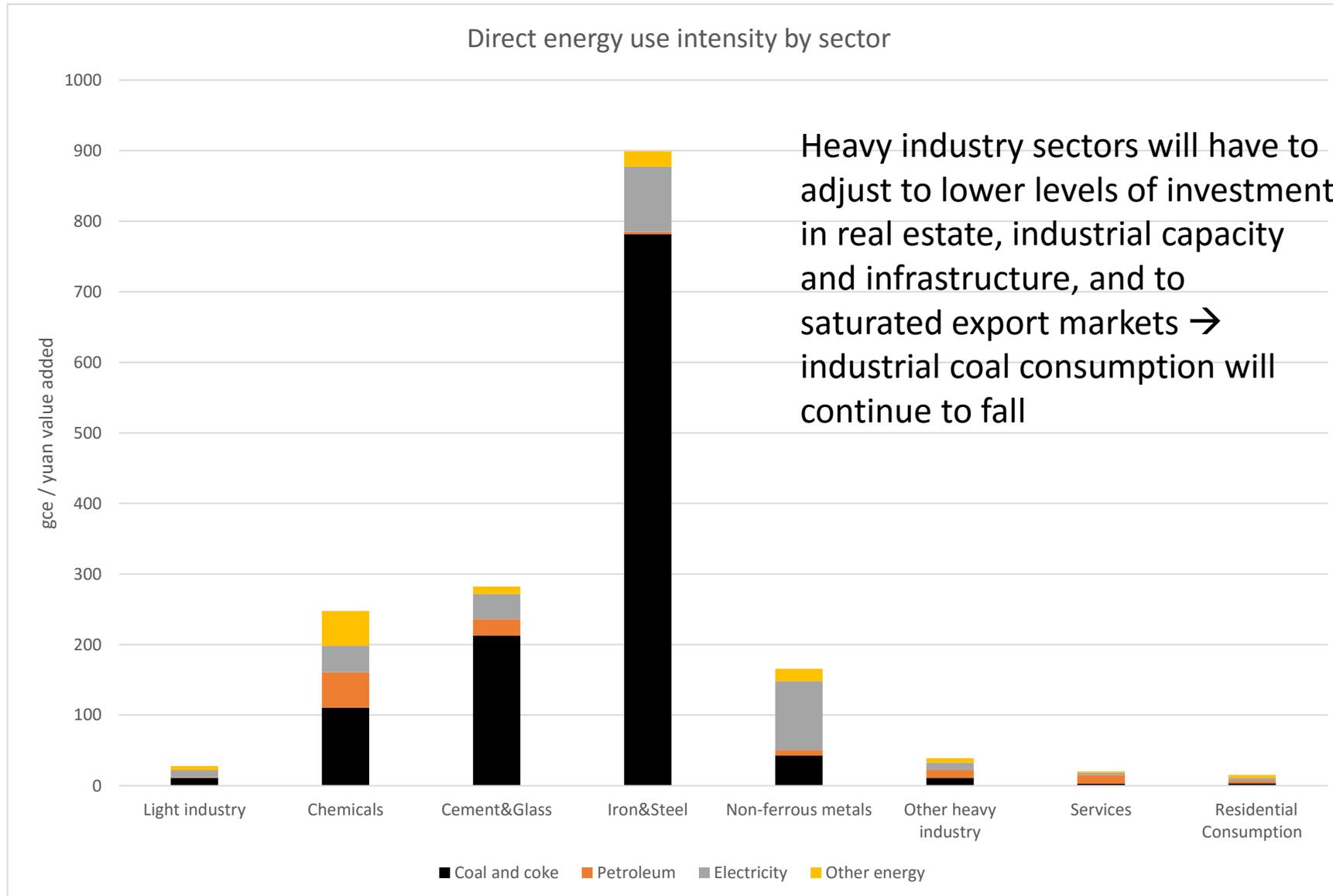
China's implied coal consumption vs. IEA 450ppm scenario (12-month sum)



Growth in electricity generation by source

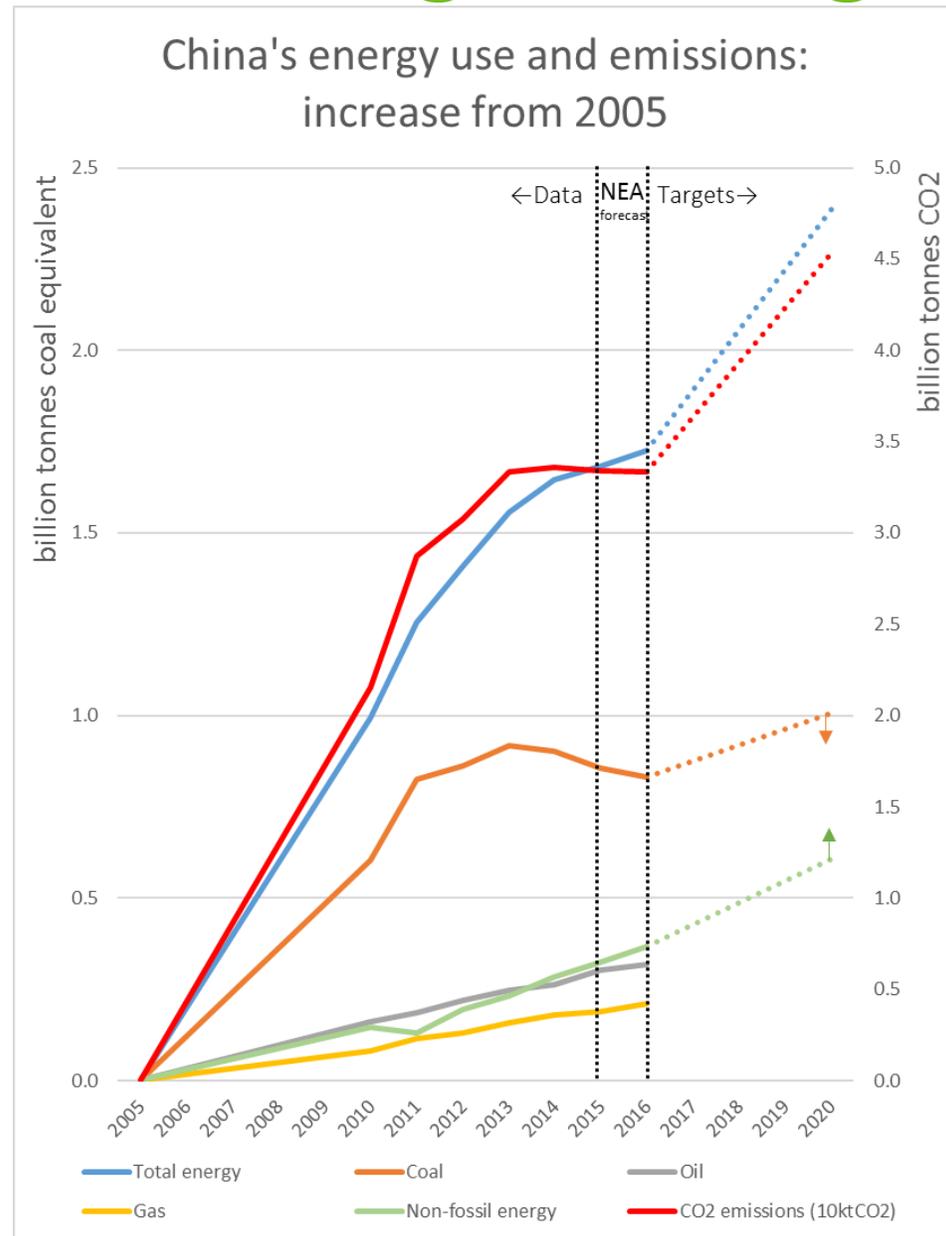


What does consumption-driven growth mean for energy use?

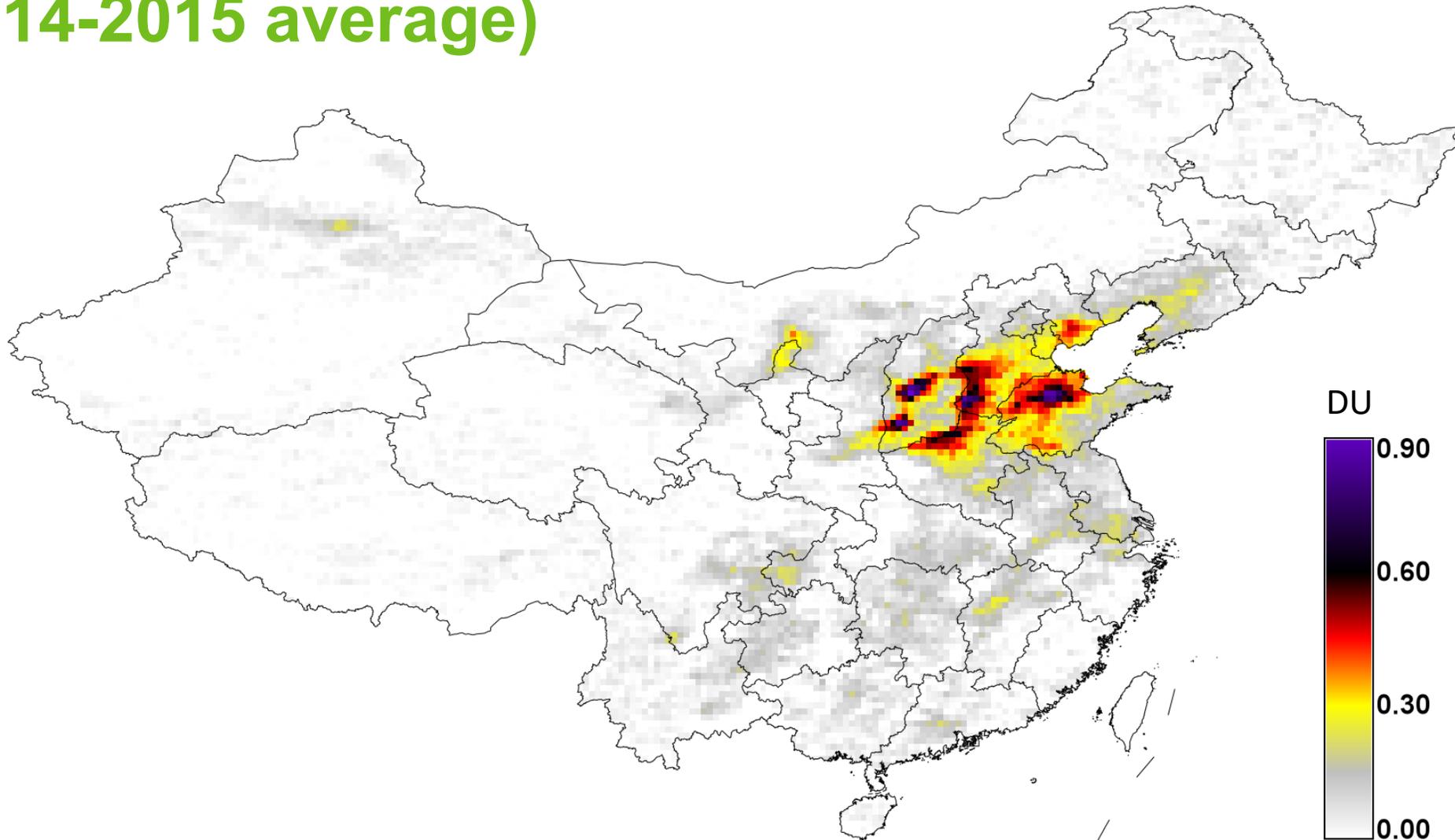


Calculated from China Energy Statistical Yearbook 2015

Lots of room to strengthen targets

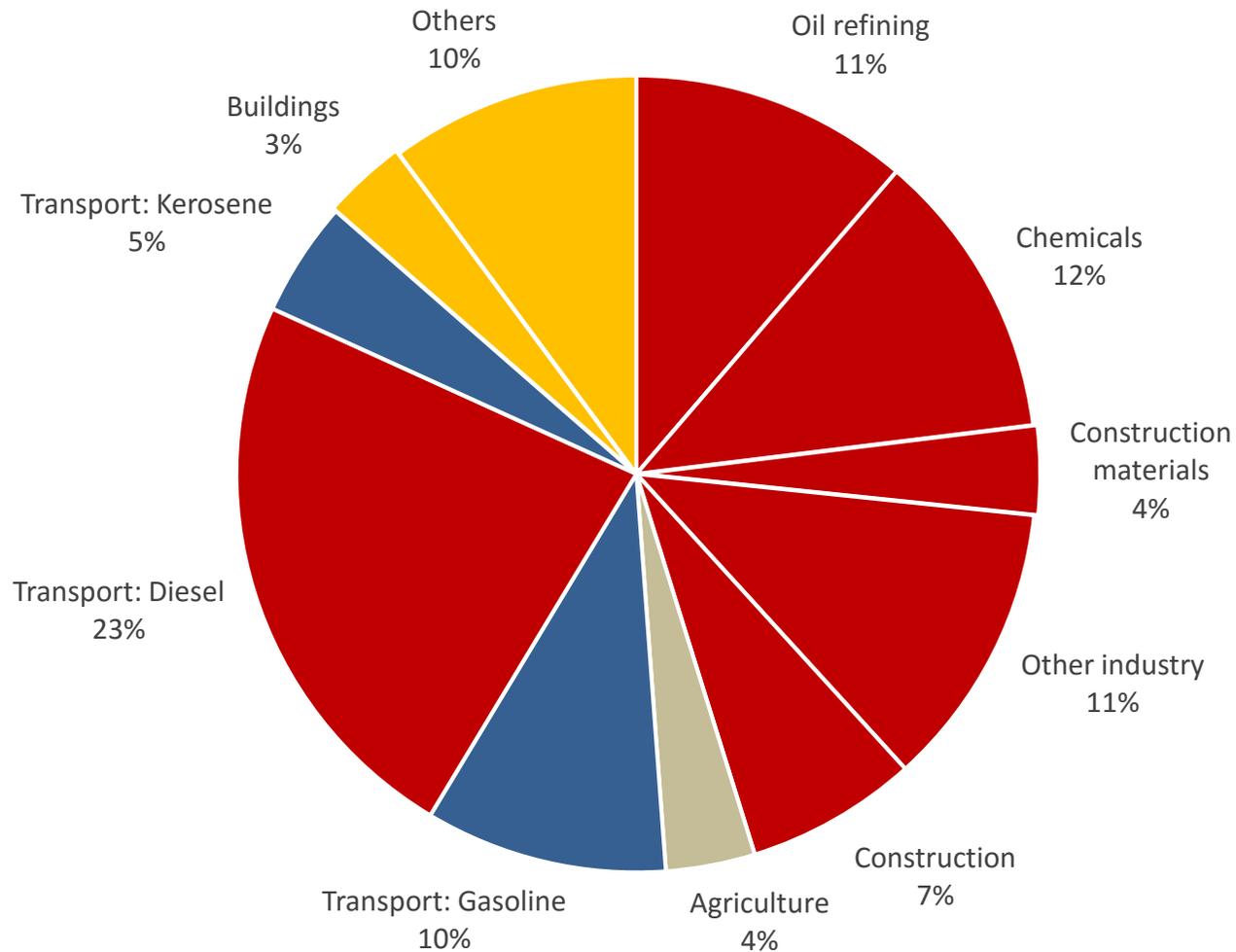


Implications for air pollution: Industrial clusters still dominate emissions (SO₂, 2014-2015 average)



Outlook for oil

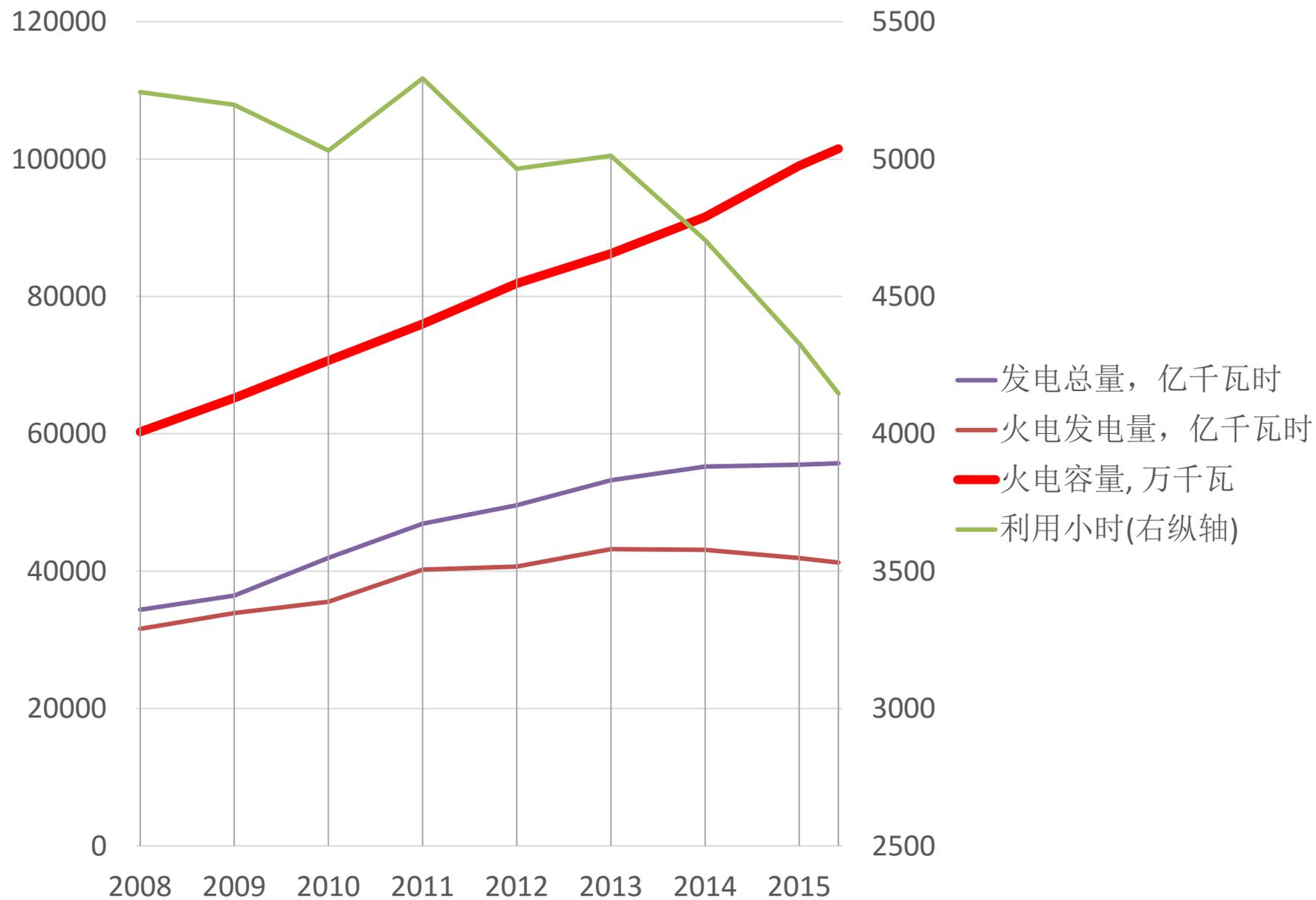
Breakdown of China's oil consumption by sector (2014)



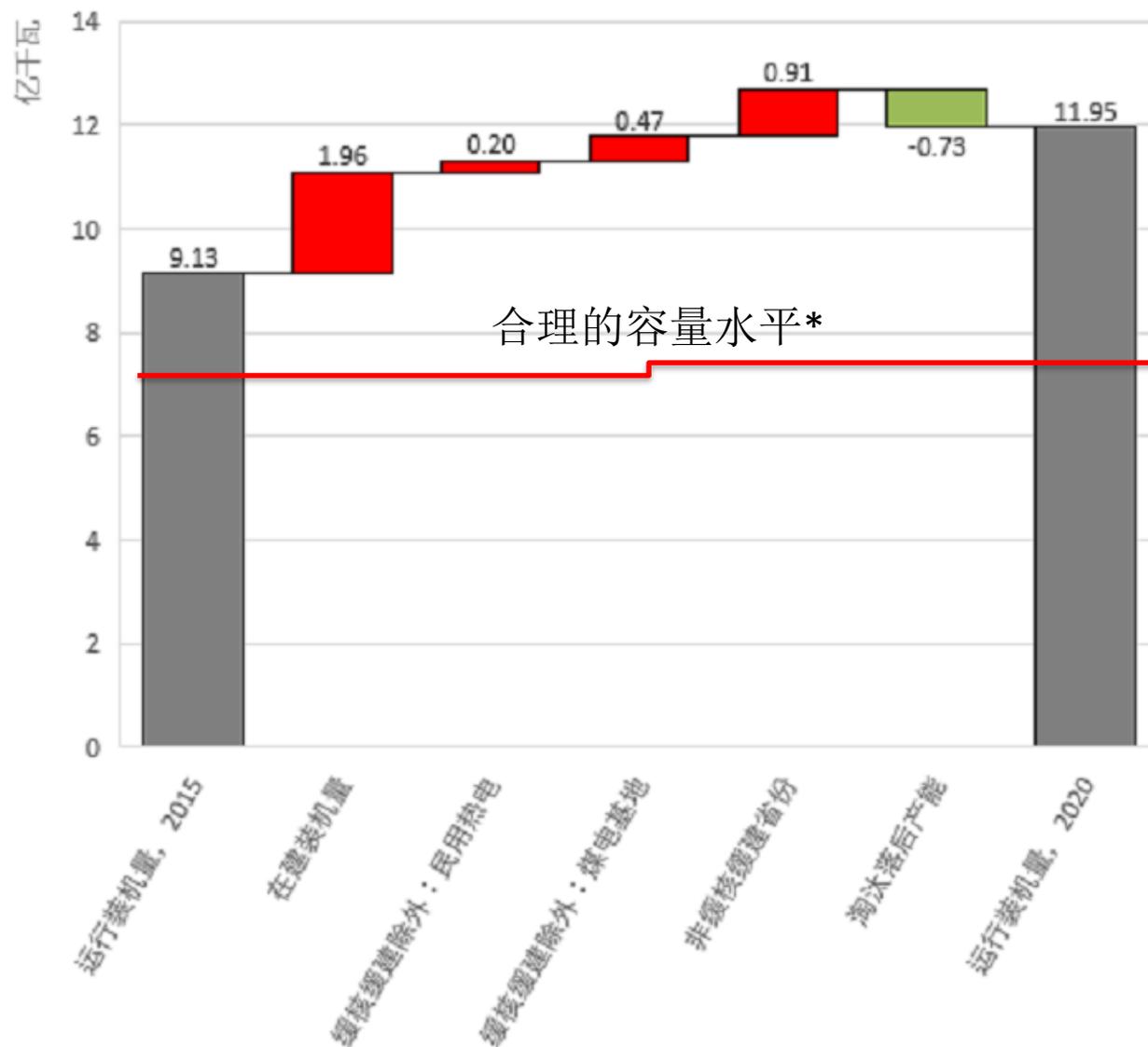
>50% of oil consumption tied to heavy industry,
<20% to passenger transport

Legend	
	Linked to overcapacity sectors
	Linked to consumer demand
	Oil use declines with energy system modernization
	Others

煤电投资泡沫

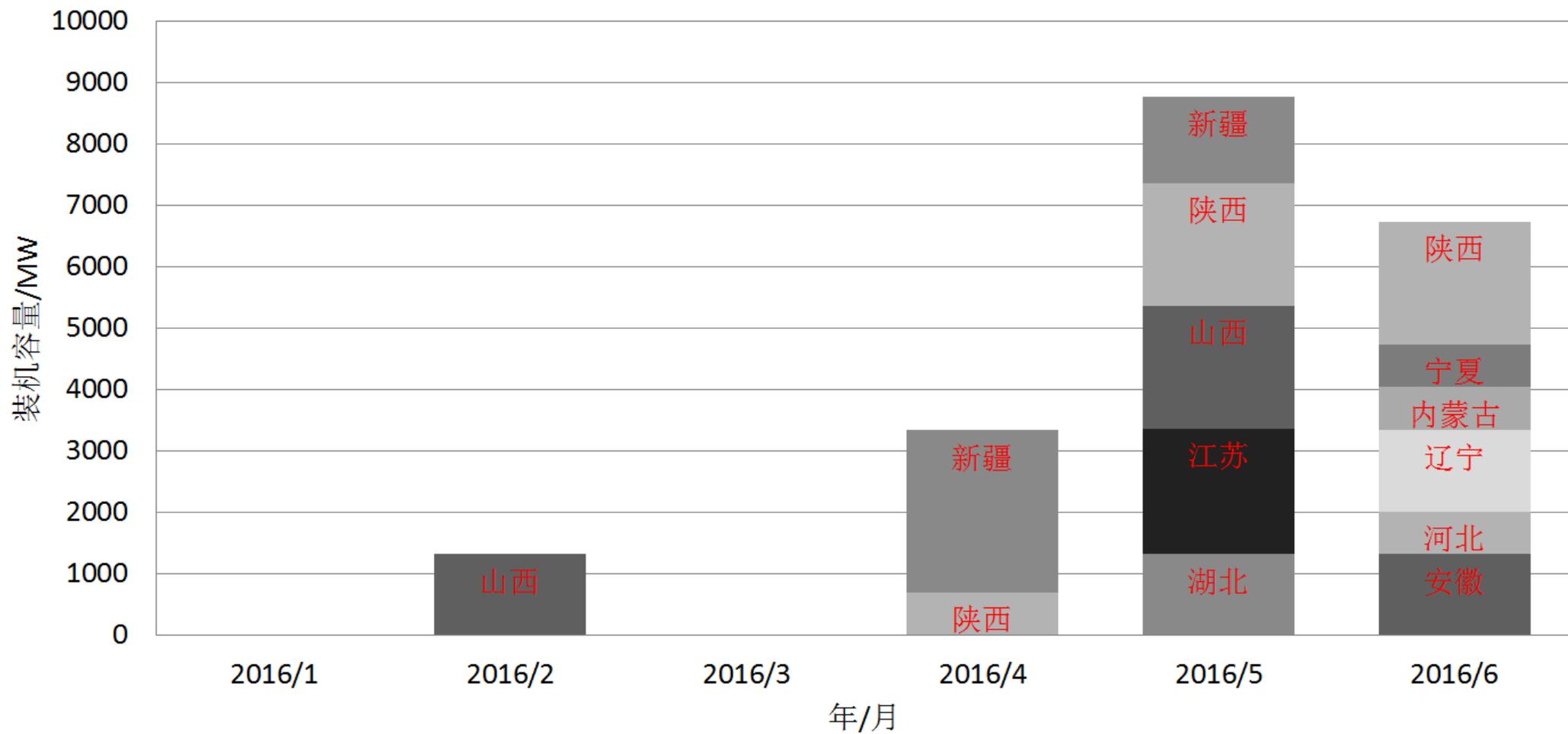


中国煤电装机量在缓核缓建及淘汰落后产能新政下的发展 预测



*基于5000小时利用率

2016上半年各省开工建设煤电项目



Key messages

- Coal is in structural decline
- Era of fast CO₂ growth is over; timing of CO₂ peak depends on success in clean energy growth and transitioning to economic “new normal”
- Economic restructuring is an enormous opportunity for climate, environment and improving living standards
- But: overcapacity and downscaling of the heavy industry complex present enormous institutional challenges
- Incredibly and unexpectedly fast progress in reducing emissions gives China a once-in-a-lifetime opportunity to play a key positive role in international climate policy

Thank you!