

## **Keswick Reminder 24.10.25: NfWW No.98 What the Chinese are really doing and why it matters**

One of the challenges of talking and writing about climate change is trying to strike a balance between doom/gloom and hope/optimism. If you struggle with this, you are not alone: we do too. Our recent pieces have been on the gloomy side, so here is a (mostly) good news story.

According to the think-tank Ember, in the first half of this year, for the first time ever, globally renewables – most of which were wind and solar – generated more electricity than coal, whose burning is the largest contributor to climate change.

But at the same time, the International Energy Agency on Tuesday lowered its forecast for renewable energy growth in the United States over the next five years by almost 50% because of the Trump administration's roll back on climate change.

What made this year's achievement happen (despite the US) was that, according to Ember, global installations of renewable energy, especially of solar, were so great that they actually outpaced electricity demand growth. In fact, enough solar was installed, notably in China and India, to meet more than four-fifths of new energy demand.

But isn't China the world's biggest emitter? And aren't they still building coal-fired plants there? Yes, to both questions. So how does that add up? There are two reasons. First, the Chinese economy is still growing rapidly for which coal-fired plants are apparently needed as a 'balancer', that is to fill in gaps at night-time and when the wind isn't blowing. For this reason, most of the new plants are built with technologies that make them easier to turn off and on rapidly according to demand. In fact, now Chinese coal-fired plants are running for only about half of the time.

Second, some regions of this vast country are lacking in renewable potential and so still depend on fossil-fuel electricity generation. But this need will lessen as the country upgrades and extends its high voltage grid.

But while this is happening, China is rolling out wind and solar at a phenomenal rate. In 2024, it added almost enough solar alone to power the whole of the UK for a year. It is moving so quickly on renewables that experts think emissions from their coal-fired plants will peak around 2028.

But also while this is happening, in the USA the Trump administration is aggressively thwarting investment in renewables, cancelling or halting \$8b worth of major renewable projects, despite renewables, with certain caveats, producing cheaper power almost everywhere. At the same time the President undermines climate science and calls climate change a 'hoax', fabricated by the Chinese to make US manufacturing uncompetitive. In the light of what the Chinese are really doing, installing renewables at break-neck speed, this is a huge strategic miscalculation.

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