

Today's Webinar Will Begin Shortly:

The Next Chapter of the Energy Transition: Top Energy Topics to Expect in 2021

QUESTIONS?

Use the questions box on your screen

AUDIO ISSUES?

Use the global dial-in number in your confirmation email



Presenter:

Yuan-Sheng Yu

Director, Research



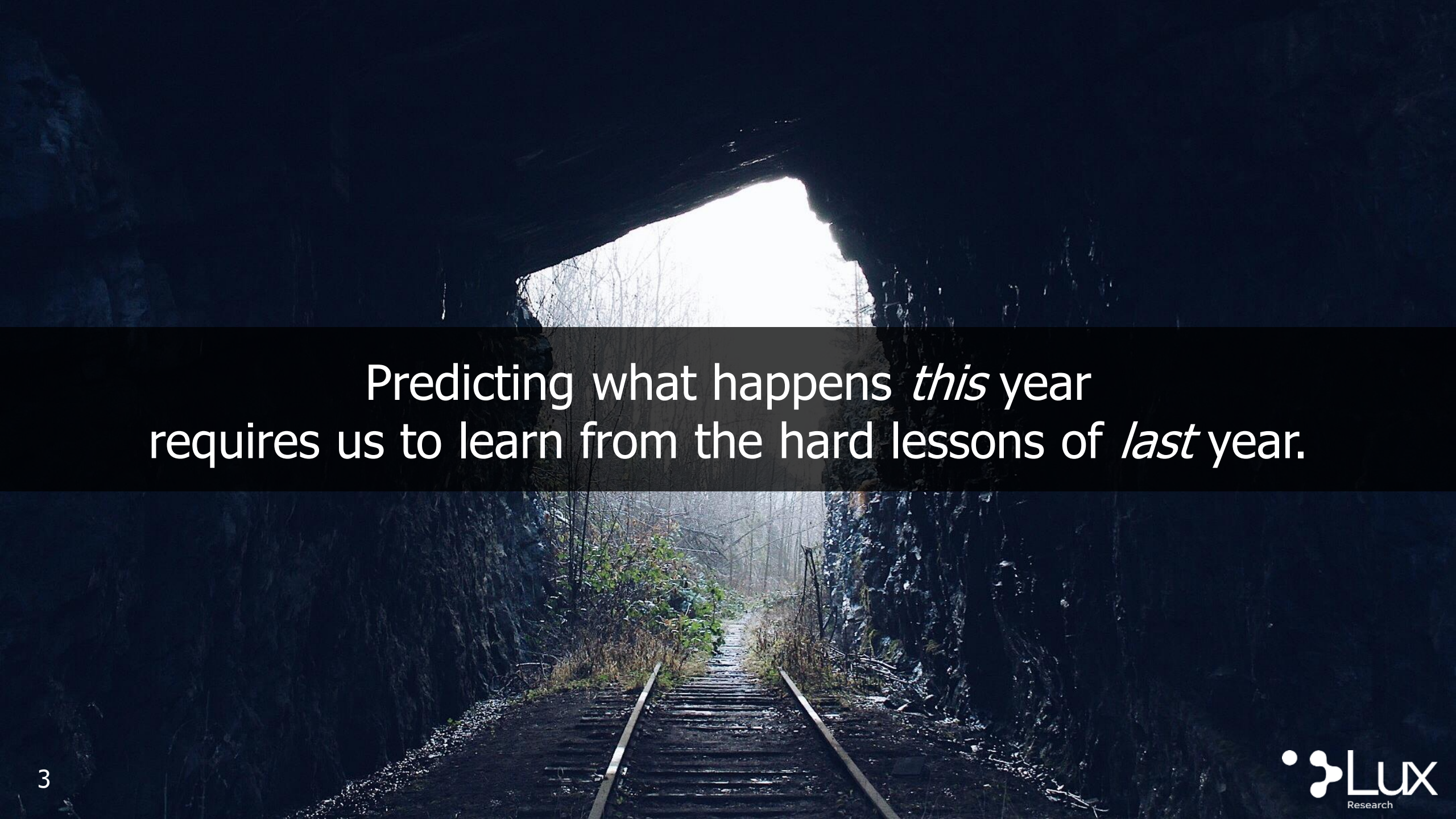
The Next Chapter of the Energy Transition: Top Energy Topics to Expect in 2021



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A dark, narrow tunnel with a bright opening at the end. The walls are rough and dark. In the foreground, a set of railroad tracks leads towards the opening. The light from the opening illuminates the tracks and the surrounding area.

Predicting what happens *this* year
requires us to learn from the hard lessons of *last* year.

Reviewing 2020 and writing the next chapter

2020 has been an unprecedented time with COVID-19 having an immediate and significant impact on all aspects of the energy sector.

Despite the personal and professional struggles, the energy transition continued to move forward – what were the hottest energy topics in 2020?

2020 will undoubtedly catalyze the energy transition – are you ready for the next chapter?



2020 has been an unprecedented time, with COVID-19 having an immediate and significant impact on all aspects of the energy sector – oil and gas, electricity, emissions, and mobility.





Oil demand dropped 20% in 2020 leading to sustained low oil prices



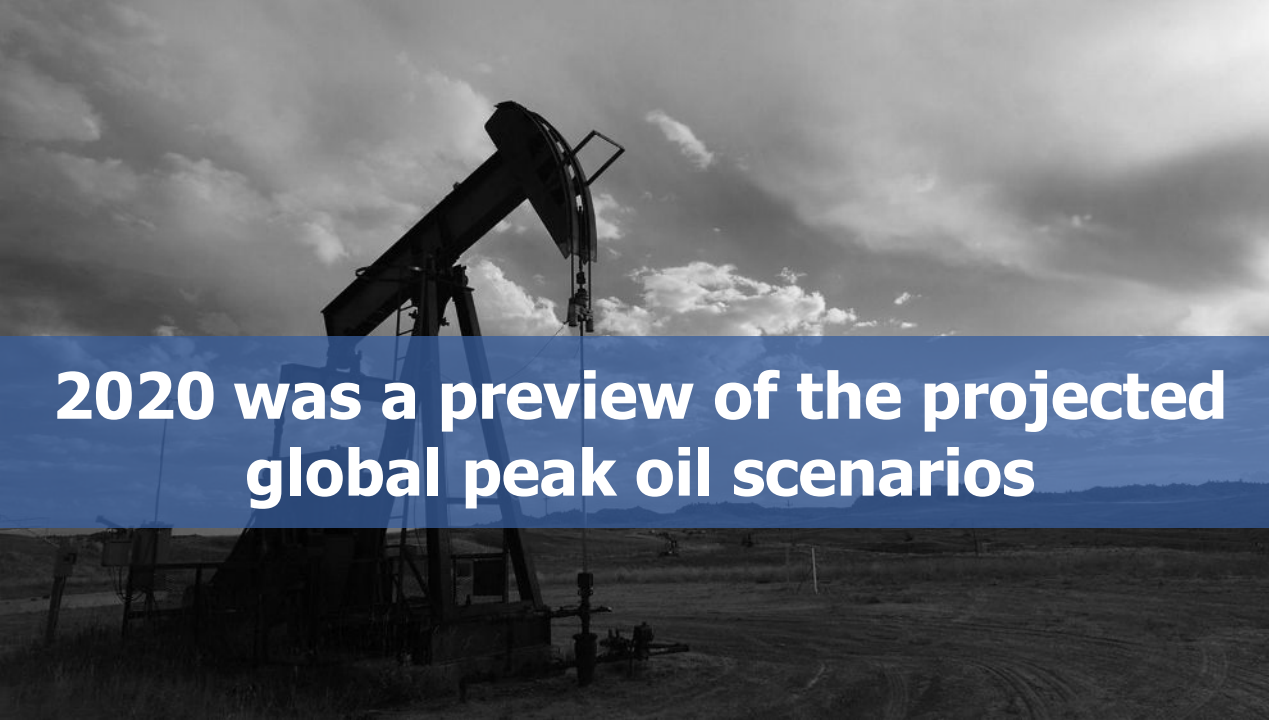
Coal-fired power plants lost significant share in electricity mix



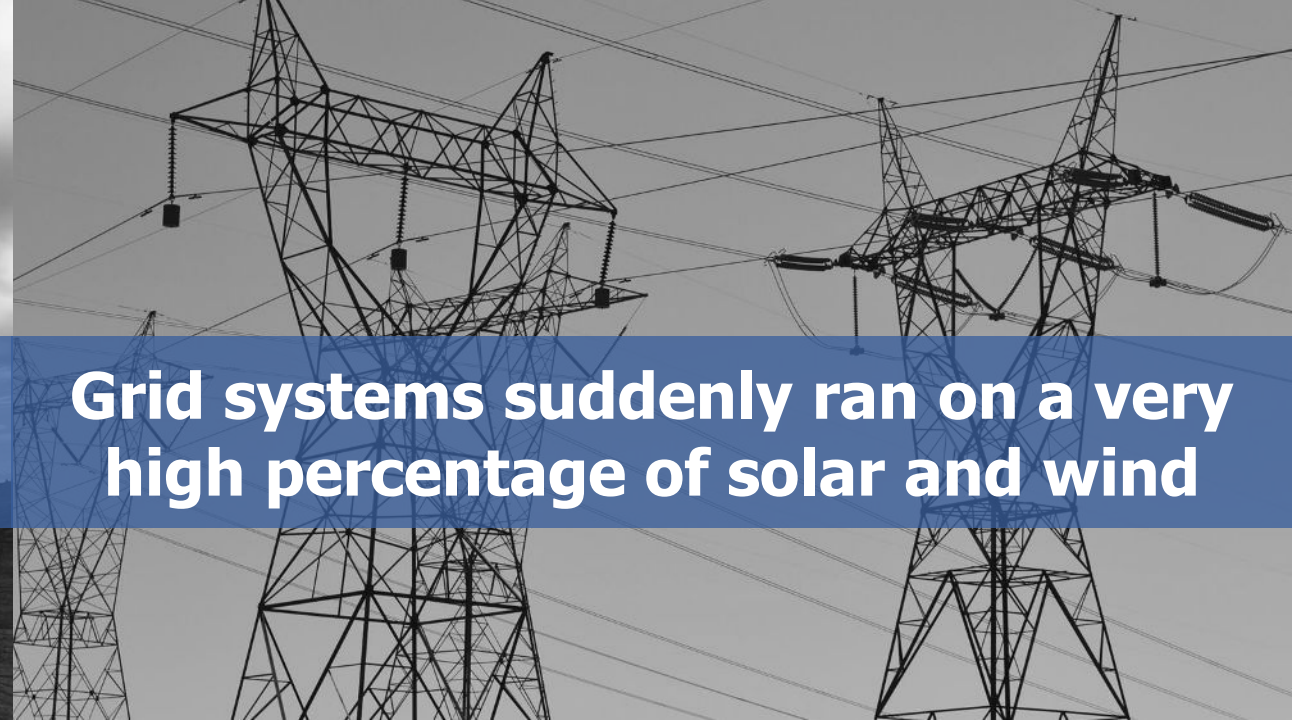
Largest year-over-year reduction in global CO₂ emissions



Mobility witnessed a 40% to 80% reduction across the world



2020 was a preview of the projected global peak oil scenarios



Grid systems suddenly ran on a very high percentage of solar and wind



CO₂ emissions reduction efforts revitalized in post-COVID plans



Potentially disruptive impacts on mobility trends moving forward



Despite COVID-19 the energy transition continued to move forward –
what were the hottest energy topics of 2020?

WHAT'S HOT IN ENERGY 2020?

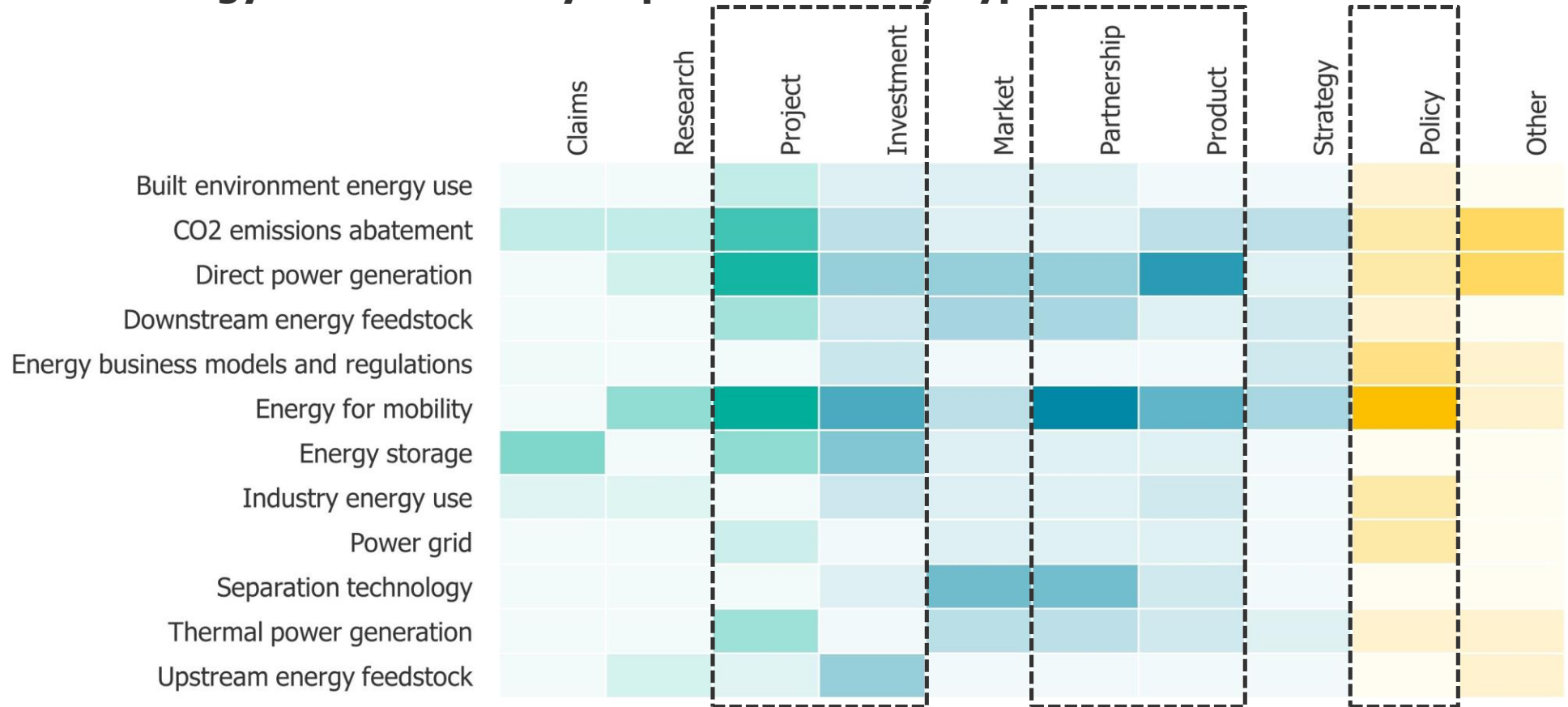
CO₂ capture and utilization made up the majority of last year's most popular startups

WHAT'S HOT IN ENERGY 2020?

An eventful year of new projects, investment activity, and partnerships for the energy industry

2020 Energy News Events by Topic and Activity Type



TRULY DISRUPTIVE

Germany passes €9 billion national hydrogen strategy

Calls for 5 GW of new green hydrogen capacity with €7 billion dedicated towards development.

Allocated €2 billion towards international collaboration on supply, transport and storage, and downstream applications.

Identifies an 85 TWh shortfall between green hydrogen supply and hydrogen demand in 2030.

LUX TAKE

Germany's landmark national hydrogen strategy has been a catalyst in the international interest in developing a hydrogen economy.



TRULY DISRUPTIVE

China announces carbon neutrality by 2060

China announced goals for peak carbon emissions by 2030 and carbon neutrality by 2060.


Highlights the need for a green strategy for post-COVID global economic recovery.

Japan and South Korea closely followed with their own individual pledges for carbon neutrality by 2050.

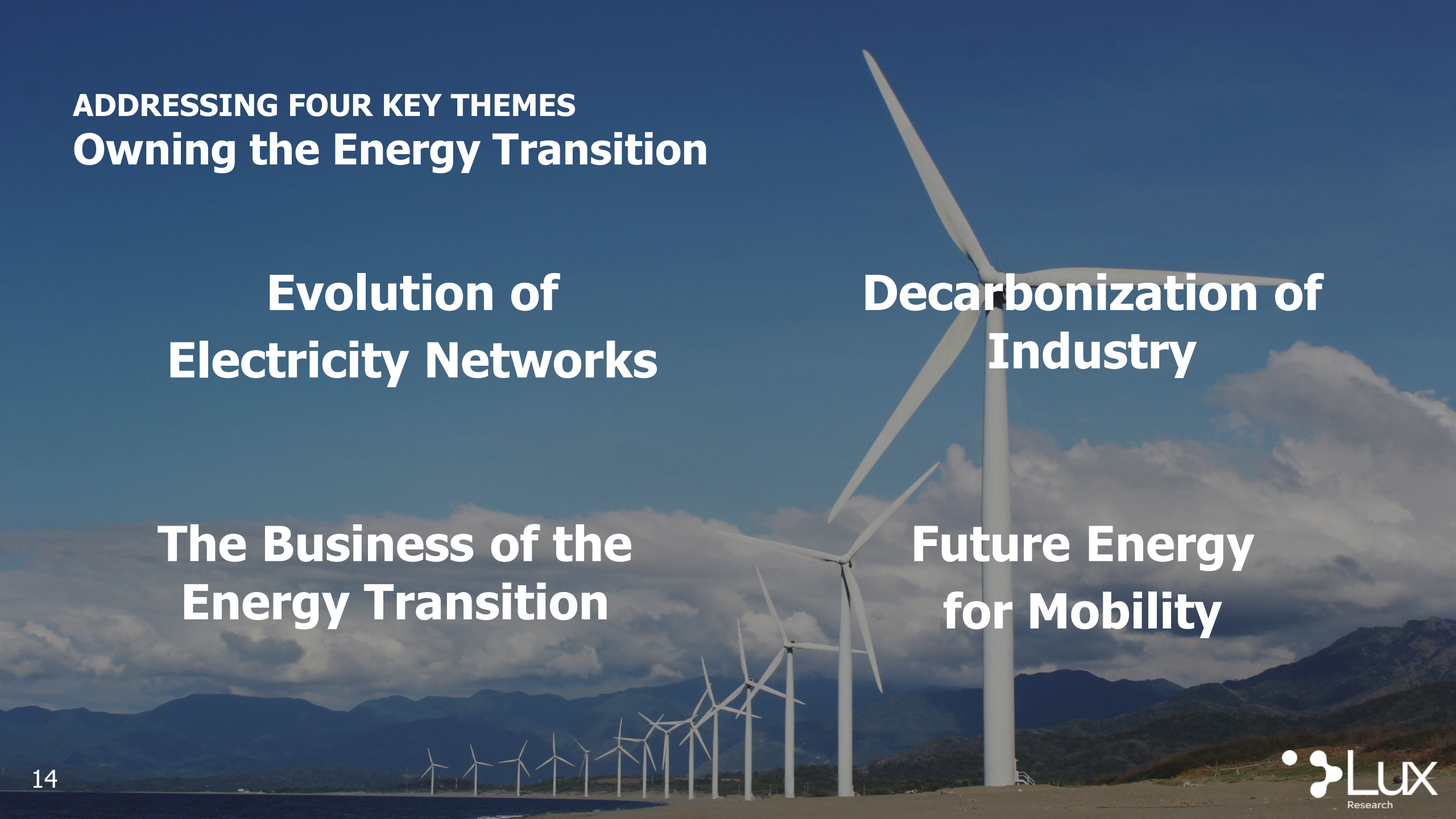
LUX TAKE

China has established its as a global leader in the deployment of new energies, but still requires substantial changes to meet its goals.





Introducing the next chapter of the energy transition and
Lux's top predictions for 2021



ADDRESSING FOUR KEY THEMES
Owning the Energy Transition

**Evolution of
Electricity Networks**

**Decarbonization of
Industry**

**The Business of the
Energy Transition**

**Future Energy
for Mobility**



Electrolyzer capacity

Runeel Daliah
Analyst

“

Announced electrolyzer capacity will triple in 2021.

China will lead announced capacity with 5 GW of electrolyzer capacity to be constructed before 2025. Relying heavily on international collaboration.

”



Image Source: Linde



CO₂ capture projects

Abhirabh Basu
Analyst

“

Record investments in carbon capture, including direct air capture.

With major economies committing to carbon neutrality by 2050 investments in CO₂ capture projects will see a significant uptick in 2021.

”

The Next Chapter

Permanent changes to the global energy system are coming – quickly.

Make your organizations more resilient and agile with new technology and business model innovations.

Align strategies with post-COVID recovery plans – see the light at the end of the tunnel.



Innovate Smarter & Grow Faster With Lux

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