Disclaimer: *The content of this Monitor does not represent the position or the views of the European Union.*

China Energy Updates

November 2024

Statistics

In October

	Production	Change YoY Year on Year	Change MoM Month-on-Month	Imports	Change YoY Year-on-year	Change MoM Month-on-month
Coal	410 million tonnes	+4.6%	Flat	46.25 million tonnes	+28.5%	-2.8%
Crude oil	17.77 million tonnes	+2.5%	+4.1%	44.7 million tonnes	-8.7%	-1.7%
Natural gas	**20.8 bcm**	**+8.4%**	+7.8%	10.54 million tonnes	+20.7%	-12.1%
Power generation	**731 billion kWh**	+2.1%				
Year-to-Date (YTD)	7,802 billion kwh	+5.2%				

Regulatory and policy updates

China's long-awaited Energy Law, approved in November 2023, takes effect **on 1 January 2025**. The law covers **nine key areas**: general rules, energy planning, development and use, market systems, storage and emergencies, technological innovation, supervision, legal responsibilities, and supplementary provisions. It clarifies the roles of energy management departments at both central and local levels.

Revisions to the draft include:

- Adding a sentence **to establish and improve energy standards**, ensuring energy security, and promoting green, low-carbon transitions and new energy technologies, industries, and business formats.
- Replacing "clean energy" with "renewable energy" to reflect the variable nature of renewable sources like wind and solar, unlike stable nuclear power.
- Detailing energy supply company obligations, **including prohibiting illegal fees**.
- Introducing a provision for the State Council's energy authority to improve cross-provincial emergency responses.

The Energy Law will underpin a comprehensive energy legal system, supporting existing and future laws and regulations.

The NEA issued a a **Notice on Further Standardisation of Power Market Trading Activities** to mitigate market risks, standardise trading behavior, and ensure a unified, open, competitive, and orderly power market. Key provisions include:

- Entities must promote a fair and competitive market, avoiding anti-competitive practices.
- Operators cannot abuse dominant positions to manipulate prices or disrupt the market.
- Generator-sellers cannot exploit their position to gain unfair advantages.

- The Electricity Market Management Committee[1] will strengthen internal discipline and self-regulation.
- Pricing must reflect true value, considering costs and supply-demand factors.
- Entities must provide independent quotations and avoid collusion.
- Price and volume fixing outside of bilateral agreements is prohibited.
- Market operators will monitor and report violations to the NEA every six months.

Coal updates

China's coal production **reached a record 3.48 billion tonnes in the first three quarters, a 0.6% YoY increase**. Shanxi, Shaanxi, Inner Mongolia, and Xinjiang produced 2.83 billion tonnes, or 81.4% of the national total. Coal imports also hit a record 390 million tonnes, up 11.9% YoY. The China Coal Industry Association expects both demand and supply to continue rising in the fourth quarter.

Oil and gas updates

TotalEnergies and Sinopec have signed a **15-year agreement for the supply of 2 million tonnes of LNG annually**, commencing in 2028. This agreement, signed at the 7th China International Import Expo, implements the strategic cooperation framework established in May 2024, extending the companies' partnership across the oil and gas value chain, including exploration, development, refining, chemicals, engineering, and new energy.

With the onset of winter, many Chinese localities[2] have **adjusted non-residential pipeline natural gas prices**, implementing a gas price linkage mechanism[3] to ensure price stability across the supply chain. This follows the National Development and Reform Commission's 2023 "**'Guiding Opinions on Establishing and Improving the Mechanism for Linking Upstream and Downstream Natural Gas Prices'**" prompted by operational challenges faced by Hebei province urban gas companies due to price mechanism failures.

China National Petroleum Corporation (CNPC) and Petronas signed a memorandum of understanding to extend their strategic cooperation in oil and gas exploration, the LNG value chain, renewable energy, green hydrogen technology, and digitalization.

Clean energy updates

China has surpassed its target for new energy installation six years ahead of schedule, according to the National Energy Administration (NEA). By the end of July, the country's installed wind and solar power generation capacity reached 1.206 billion KW, exceeding the 1.2 billion KW goal set for 2030. Furthermore, as of the end of September, new wind and solar installations represented over 80% of all new power generation capacity.

China has raised its targets for renewable energy substitution, according to the **Guiding Opinions on Renewable Energy Substitution Actions** issued by the NDRC and five other ministries. By 2025, nationwide renewable energy consumption should exceed the equivalent of **1.1 billion tonnes** of standard coal, surpassing the 14th Five-Year Plan for Renewable Energy goal by 100 million tonnes. This figure should rise to over **1.5 billion tonnes** by 2030.

The Opinions prioritise:

- Expanding renewable energy supply: Increasing generation capacity, accelerating infrastructure construction, exploring demand-side regulation, and improving power system regulation.
- Targeting key sectors: Accelerating the transition to renewable energy in industry, transport, construction, rural areas, and new infrastructure.

[1] The Electricity Market Management Committee (EMMC) is an autonomous deliberative and coordination mechanism independent of electricity trading entities. It plays a key role in ensuring self-regulation among market participants and serves as one of the "three lines of defence" for the electricity market, alongside market monitoring by operators and professional oversight by regulators.

[2] Hunan, Xi'an, Beijing, Shanghai, etc

[3] Referring to the linkage between upstream and downstream natural gas prices, thus, adjusting the terminal sales prices based on the gas source procurement costs

- Driving innovation: Promoting pilot programs for renewable energy substitution.

Strengthening supporting measures: Improving legal frameworks, consumption mechanisms, financial policies, and market pricing, while fostering international cooperation.

The Ministry of Industry and Information Technology's draft "**Action Plan for the High-Quality Development of New Energy Storage Manufacturing**" sets the following targets for 2027:

- Scale the new energy storage manufacturing industry to meet diverse demands across power, industry, energy, transport, construction, communications, and agriculture.
- Significantly enhance the resilience of industrial and supply chains, and strengthen the standard system, management system, and market mechanism.
- Improve the supply capacity of safe, reliable, energy-efficient, durable, and economically feasible new energy storage products.
- Establish three to five leading enterprises with a market value exceeding CNY 100 billion.

In November, the first phase of the **San'ao Nuclear Power Plant in Wenzhou**, Zhejiang Province was completed and connected to the State Grid, making it China's **first grid-connected, privately-funded nuclear power plant**.

December 2024

Statistics

In November in China,

	Production	Change YoY Year-on-Year	Change MoM Month-on-month	Imports	Change YoY Year-on-Year	Change MoM Month-on-month
Coal	430 million tonnes	+1.8%	+4.9%	54.98 million tonnes	+26.4%	+18.89%
Crude oil	17.25 million tonnes	+0.2%	-2.9%	48.52 million tonnes	-14.4%	+8.5%
Natural gas	20.7 billion cubic metres	+3.1%	-0.5%	10.80 million tonnes	-0.8%	+2.5%
Power generation	749.5 billion kWh	+0.9%				
Year-to-Date (YTD)	8,569 billion kwh	+5%				

Regulatory and policy updates

The National Energy Administration (NEA) welcomed its new chief, Wang Hongzhi, who has 32 years' experience in the power sector, including time at both the State Grid and China Southern Power Grid. Prior to this appointment, Wang was the vice chairman of the State-owned Assets Supervision and Administration Commission.

On 15 December, the NEA held the **2025 National Energy Work Conference**, outlining these priorities:

- Establish a new energy system prioritising non-fossil energy sources, supported by fossil fuels, a new power system, and green, smart, efficient energy consumption.
- Accelerate the development of institutions and mechanisms for the new energy system, including a unified national power market, optimised oil and gas pipeline network operation, and market-oriented reform of competitive sections, with independent operation of monopoly sections.

- Ensure energy security by maximising the role of coal and coal-fired power, accelerating oil and gas reserve development, enhancing energy storage capacity, and improving monitoring and early warning systems.
- Accelerate the development and utilisation of wind and solar power, balance hydropower development with ecological protection, and promote safe, orderly nuclear power development.
- Strengthen the capacity to secure overseas energy resources, foster collaboration on green energy, and participate actively in global energy governance.

One day later, the NEA organised the **2025 Energy Supervision Work Conference**. It outlined the following objectives for 2025:

- Improve monitoring and early warning systems for energy supply and demand.
- Supervise and promote the implementation of national energy plans, policies, and projects to enhance energy security.
- Supervise the construction of renewable energy bases in desert regions.
- Promote green electricity certificates and encourage new energy entities to participate in the market.
- Supervise the fairness and openness of power grids and oil and gas pipeline networks.
- Strengthen regulation of natural monopolies in the energy sector and improve power safety supervision.
- Carry out the third round of comprehensive supervision in the power sector.
- Develop supporting supervision regulations in accordance with the Energy Law.

The Ministry of Industry and Information Technology (MIIT) has suspended steel production capacity replacement. The MIIT will research the "**15th Five-Year Plan**" for the steel industry, introduce new capacity replacement measures, and optimise the industry's structure, according to Chang Guowu, Director General of the Department of Raw Materials Industry. "Since the second half of 2022, the steel industry has been significantly affected by real estate and other downstream industries," he added. National Bureau of Statistics data shows that from January to November this year, national crude steel production decreased by nearly 23 million tonnes YoY, a 2.7% reduction.

Coal updates

The National Development and Reform Commission (NDRC) has issued **Regulations on the Overall Planning and Management of Coal Mining Areas**, effective from 1st February 2025. These regulations, covering application, approval, implementation, and management, apply to planning preparation and supervisory departments, outlining their legal responsibilities. Overall planning for coal mining areas will be conducted by an engineering consulting unit appointed by the provincial coal mining area planning management department. Plans for coal mining areas **exceeding 10 million tonnes per year** in scale must be submitted to the NDRC for approval, along with review opinions from both the provincial coal mining area planning management department and the provincial coal industry management department.

Oil and gas updates

China's oil demand is projected to peak at approximately 770 million tonnes around 2025, according to the China National Petroleum Corporation's Economic and Technological Research Institute (ETRI). Demand in 2024 is expected to be 756 million tonnes, a 0.04% year-on-year increase. ETRI anticipates this peak will be followed by a gradual decline, reaching 240 million tonnes by 2060 – a nearly 70% drop.

ETRI also predicts that China's fossil fuel demand and energy-related carbon emissions will peak in 2028. Natural gas demand will rise gradually, peaking at 620-650 billion cubic metres in 2035.

Sinopec has completed construction of China's largest petrochemical base, with a refining capacity exceeding 50 million tonnes per year. It is now China's largest, most advanced, and globally competitive petrochemical hub.

Electricity updates

The National Energy Administration (NEA) encourages **new business entities** in the power distribution sector to participate in the power market. These entities use new technologies and operational models to adjust electricity power and are categorised into two types: **single technology and resource-aggregated**. Single technology entities focus on distributed energy sources (e.g., wind and solar), energy storage, and adjustable loads. Resource-aggregated entities include those focus on virtual power plants (load aggregators) and smart microgrids. These new entities are generally exempt from requiring a power business licence.

Clean energy updates

Three ministries[4] have issued the "**Guidance Catalogue for High-Quality Development of Industries Supported by Natural Resource Elements (2024 Edition)**", clarifying land-use requirements for photovoltaic (PV) and offshore wind projects:

- **Encouraged:** PV projects can utilise unused or agricultural land, but should avoid arable land, ecologically sensitive areas, and natural habitats. Large-scale PV projects should be located in desert, arid regions, or on reclaimed mining land.
- **Restricted:** PV projects are not permitted on tidal flats or wetlands. Offshore PV projects must be within provincial waters and are generally limited to enclosed aquaculture areas, offshore wind farm areas, thermal discharge zones, and reclaimed salt flats.
- **Prohibited:** PV projects are prohibited on tidal flats, wetlands, and other wetland areas. Offshore wind projects must be located within provincial waters.

Tencent has launched **China's first data centre microgrid project** in Hebei Province. Integrating distributed wind power, rooftop photovoltaics and lithium battery energy storage, the project has a total installed capacity of **10.99 MW** and will generate 14 million kWh annually.

EU Energy Updates

November 2024

Regulatory and policy updates

The EU's net greenhouse gas emissions fell by 8.3% in 2023, the second largest reduction in decades after a 9.8% drop in 2020. Emissions from ETS-regulated power and industrial facilities **fell significantly (16.5%)**, largely due to increased renewable electricity (wind and solar) and a shift from coal to natural gas. However, emissions from **intra-European aviation rose by 9.5%**. In Q2 2024, Eurostat estimated the EU's greenhouse gas emissions at **790 million tonnes of CO2-equivalent, a 2.6% decrease from Q2 2023.**

On November 7th, the European Commission launched the **Ecodesign Forum** to implement the **Ecodesign for Sustainable Products Regulation (ESPR)**, in effect since July 18th, 2024. The Forum comprises experts from Member States, industry, civil society, and academia who will advise on product performance and information requirements to enhance sustainability. **ESPR mandates** include improving product durability, recyclability, and resource efficiency, while reducing harmful substances and setting targets such as an 80% packaging recycling rate by 2030.

On November 19th, the European Council approved a regulation establishing the EU's first **certification framework for permanent carbon removals, carbon farming, and carbon storage in products**. The regulation covers permanent carbon removals and carbon storage activities lasting at least 35 years, and carbon farming activities lasting at least five years. **Certification criteria** include quantified net benefits, additional financial viability, long-term storage, and environmental co-benefits.

[4] Ministry of Natural Resources, NDRC, and the National Forestry and Grassland Administration

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Clean energy updates

On November 5th, the European Council adopted conclusions based on a European Court of Auditors report concerning the **EU's renewable hydrogen industrial policy**, urging prompt action. To achieve 2030 production and import targets, there are **five recommendations**: **updating the EU Hydrogen Strategy**; creating an EU hydrogen industry roadmap; monitoring permitting procedures; ensuring robust coordination; and funding hydrogen projects. Although **EUR 18.8 billion has been allocated to hydrogen projects for 2021-27**, challenges persist in streamlining funding and maximizing hydrogen's potential.

On November 18th, the European Commission and **South Africa** launched the **"Scaling up Renewables in Africa" campaign** to mobilise renewable energy investments in Africa. This initiative builds upon the EU-Africa Global Gateway Investment Package, providing EUR 150 billion in investments between 2021 and 2027, and aims to attract substantial private sector investment. The campaign will conclude around the **November 2025 G20 summit in South Africa.**

Oil and gas updates

During the first half of 2024, **average EU gas prices fell 7%** compared to the same period in 2023 (€11.9 to €11 per 100 kWh), and 2% compared to the latter half of 2023. This resulted from a 12% drop in pre-tax gas prices, though taxes on gas bills increased from 22.8% to 27.4%.

On November 12th, at COP29 in Baku, the **European Commission launched the Methane Abatement Partnership Roadmap** to accelerate methane reduction in fossil energy production and consumption. Developed with global partners, the Roadmap includes actions like implementing an MRV system aligned with OGMP 2.0 principles and a project plan for reducing emissions from existing assets. This aligns with the Global Methane Pledge, under which over 150 countries committed to a 30% reduction in global methane emissions from 2020 levels by 2030
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On November 13th, the European Commission and the **Beyond Oil and Gas Alliance (BOGA)** partnered to accelerate the transition away from fossil fuels by: promoting global ambition to phase out oil and gas; conducting analyses and dialogues supporting a just transition; and strengthening producer-consumer coordination.

Energy efficiency updates

The European Commission launched three public consultations to enhance energy efficiency and promote sustainable design:

1. **External Power Supplies (EPS):** A four-week consultation (starting 18 November) seeks to revise eco-design requirements, potentially saving 3% of EPS lifecycle energy by 2035.
2. **Electronic Displays:** A 12-week consultation (beginning 13 November) aims to update eco-design and energy labelling rules, with draft regulations expected in early 2026.
3. **Household Tumble Dryers:** A four-week consultation (launched 6 November) focuses on a repairability index to extend dryer lifespans from 12 to 14 years, with mandatory implementation by 1 January 2027.

On October 30th, the European Commission **welcomed 49 financial institutions into the European Energy Efficiency Financing Coalition**. These institutions, including banks, investment firms, and development banks, signed a statement of intent and will participate in the Coalition's General Assembly, Expert Platform, and National Hubs. The Coalition aims to mobilise private financing for energy efficiency, supporting the Energy Efficiency Directive (EU/2023/1791), which **targets an 11.7% reduction in final energy consumption** to 763 Mtoe by 2030.

Energy infrastructure updates

On November 18th, the European Commission, along with Spain, Lithuania, and Austria, announced **EUR 2 billion in financial support for renewable hydrogen projects**. This includes **EUR 1.2 billion from the EU and over EUR 700 million from the three Member States**. These nations will participate in the "**Auctions-as-a-Service**"[5] scheme within the second European Hydrogen Bank auction launching on **December 3rd**. Selected projects will receive **contracts for up to 10 years.**

The European Investment Bank (EIB) approved EUR 2.2 billion for energy projects across Europe and beyond, including solar power in Croatia, hydropower in Austria and Poland, renewable projects in Spain, and rooftop solar power and battery storage projects in logistics sites across Europe. The EIB also approved **EUR 400 million to upgrade Italy's national power grid** and **EUR 500 million to modernise Areti's electricity distribution network** in Rome and Formello.

Romania has established a EUR 790 million state aid[6] package to facilitate the closure of four unprofitable Jiu Valley coal mines. This measure supports Romania's coal phase-out goal of 2032 and will cover worker social costs, safety, and remediation from October 1, 2023, to December 31, 2032.

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Regulatory and policy updates

On 24 November, at COP29, the European Commission and Member States led the **adoption of the New Collective Quantified Goal (NCQG) for Climate Finance**. This aims to mobilise at least USD 1.3 trillion per year by 2035, with developed countries committing USD 300 billion per year for developing nations. The EU also launched a **Methane Abatement Partnership Roadmap**, recalling the Global Methane Pledge to cut anthropogenic methane emissions by at least 30% by 2030 (from 2020 levels).

On 3 December, the European Commission adopted a Decision establishing the **EU-wide quantity of allowances under the Emissions Trading System for buildings, road transport, and small industry (ETS2) for 2027**, setting the cap at **1,036,288,784 allowances**. This cap is based on the average CO2 emissions from fuel combustion in ETS2 sectors between 2016 and 2018, reduced by a linear trajectory until 2024 and an **annual reduction of 5.1% between 2025 and 2027**

On 12th December, the European Commission's Joint Research Centre (JRC) published **Technical specification for a harmonised methodology to calculate appropriate collection rates for waste portable and Light Means of Transport batteries**. The specifications propose moving from an 'available on the market' (AOM) to an 'available for collection' (AfC) methodology. This addresses challenges such as increased battery lifespan and emerging applications like light means of transport (LMT[7]). The JRC also provided **guidance on calculating and verifying recycling efficiency and material recovery rates**, ensuring consistent and future-proof rules across Member States. These findings will support delegated acts under Article 71 of the Batteries Regulation, particularly for lithium-based batteries, with **demand projected to increase 21-fold by 2050**.

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[5] Auctions-as-a-Service (AaaS) is a service model proposed by the European Commission where the Commission facilitates and manages auctions on behalf of Member States, enabling them to contribute their own financial resources to support additional projects within their territories. This service leverages the EU-wide auction mechanism developed by the Commission to identify the most competitive projects, thereby preventing market fragmentation and ensuring a single set of rules for project developers across Europe

[6] State aid is a form of aid granted by EU Member States. It is important to note that the EU itself does not provide the funds; rather it is the Member States that do so. The EU's role is to ensure that any state aid request is in compliance with State Aid Rules, preventing distortions of competition and ensuring that such aid does not adversely affect trade between Member States. For details of State Aid Rules, please refer to https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:12008E107&from=EN.

[7] LMT has four categories: LMT1 - e-moped & e-motorcycle batteries, LMT2 - e-cycle batteries, LMT3 - e-kickscooters batteries, LMT 4 - other LMT batteries.

.Clean energy updates

On 16 December, the European Council approved conclusions on **promoting geothermal energy**, calling for faster deployment through measures such as easier access to finance, streamlined permitting, and enhanced workforce training. The Council urged the European Commission to develop a comprehensive strategy and a **European Geothermal Action Plan** on the decarbonisation of heating and cooling. According to the **EU Solar Energy Strategy**, energy demand covered by solar heat and geothermal must at least triple to reach the EU 2030 targets.

On 18 December, EU member states agreed on updated **non-binding targets for offshore renewable energy deployment**, aiming for **86-89 GW by 2030, 259-261 GW by 2040**, and 356-**366 GW by 2050** across **five sea basins**[8]. The revised Regulation on trans-European energy networks (TEN-E Regulation) supports this expansion through coordinated grid planning and hybrid offshore projects. The European Network of Transmission System Operators for Electricity (ENTSO-E) will update strategic offshore network development plans to align with these targets.

On 19 December, reports showed that **renewables made up 24.5% of the EU's gross final energy consumption in 2023**, a rise of 1.4 percentage points from 2022. To meet its 2030 target of 42.5%, the EU must increase this by 18 percentage points, needing an average annual increase of 2.6 percentage points between 2024 and 2030. Sweden led with 66.4% of its energy from renewables, followed by Finland (50.8%) and Denmark (44.9%).

Oil and gas updates

On 29 November, the European Commission **adopted intermediate gas storage filling targets for 2025**. EU countries must meet specific thresholds: 50% (striving for 55%) by 1 February, 30% (aiming for 45%) by 1 May, and **at least 90% by 1 November 2025**. These targets, mandated by the **EU Gas Storage Regulation (EU/2022/1032)**, allow a 5-percentage-point deviation and aim to enhance supply security.

Energy infrastructure updates

On 3 December, the European Commission and the European Investment Bank (EIB) announced **a new partnership to support the European battery manufacturing value chain** with **EUR 3 billion** in public funding. This includes **EUR 1 billion** in grants for electric vehicle battery cell manufacturing via the Innovation Fund, **EUR 1.8 billion** in EIB investments for the wider battery value chain, and a **EUR 200 million** top-up to the InvestEU programme from the Innovation Fund. The funding will focus on advanced materials, component manufacturing and recycling technologies, excluding mining and extraction.

On 17 and 18 December, four State Aid[9] schemes totalling **EUR 19.3 billion** were approved to support **renewable energy and industrial decarbonisation**. A **EUR 3 billion German-Dutch scheme** will fund at least 1.875 GW of electrolysis capacity for renewable fuels of non-biological origin (RFNBOs), including renewable hydrogen. A **EUR 1.7 billion Danish scheme** targets 7**. 9 petajoules of annual renewable gas production**, specifically upgraded biogas and e-methane for grid injection. A **EUR 9.7 billion Italian scheme** will add 17.65 GW of renewable electricity capacity from onshore wind, solar PV, hydropower, and sewage gases. A **EUR 3 billion French scheme** will fund industrial decarbonisation technologies such as electrification, energy efficiency, and carbon capture and storage. Finally, a **EUR 2.6 billion Estonian scheme** will support offshore wind farms through a 20-year two-way contract for difference (CfD) mechanism, capped at **EUR 65/MWh and limited to 2 TWh/year**.

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[8] The five sea basins are Northern Seas offshore grids (NSOG), Baltic Energy Market Interconnection Plan offshore grids (BEMIP offshore), South and West offshore grids (SW offshore), Atlantic offshore grids, and South and East offshore grids (SE offshore).

[9] State aid is a form of aid granted by EU Member States. The EU's role is to ensure that any state aid request is in compliance with State Aid Rules, preventing distortions of competition and ensuring that such aid does not adversely affect trade between Member States. For details of State Aid Rules, please refer to https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:12008E107&from=EN.

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