

Opinion **Renewable energy**

We must not mistake China's success on green energy for a global one

Beijing's exponential growth in renewables is propelling a dangerous narrative that masks wider political failure

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A floating solar farm in Huainan, China © Qilai Shen/Bloomberg

Brett Christophers 11 HOURS AGO

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The view that the world is finally winning in the energy transition away from fossil fuels is increasingly prominent. It tends to be buttressed by charts showing “exponential growth” globally in renewable-power capacity and generation in recent years.

Comforting as this take may be, we need to throw cold water over it. We are emphatically not yet winning, and it is time to stop pretending that we are.

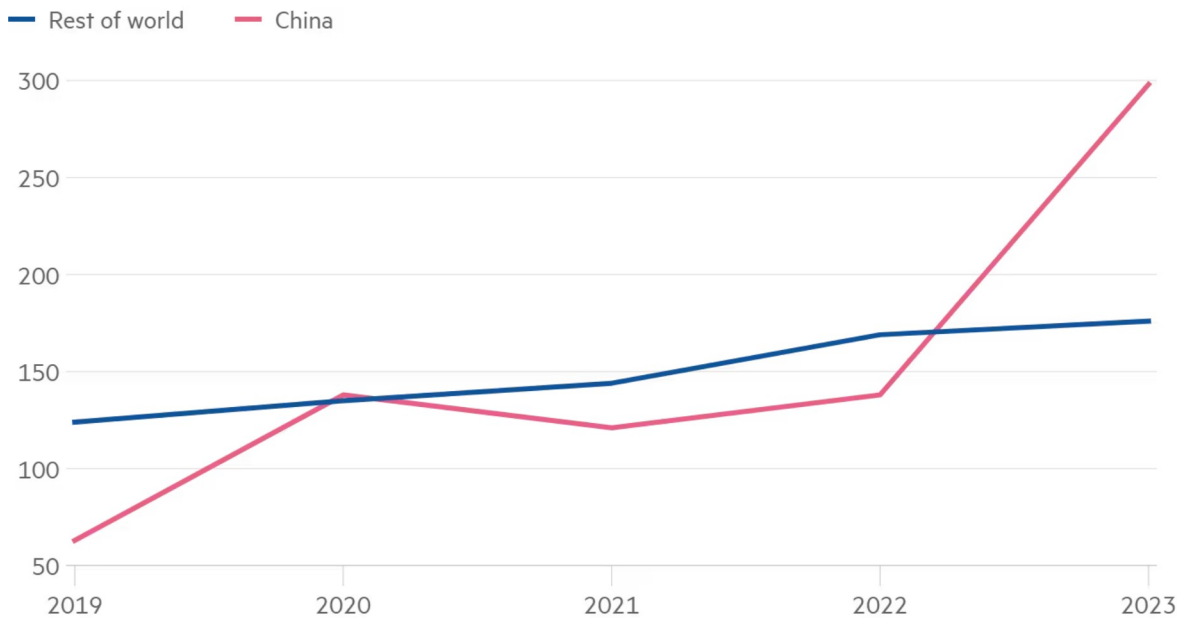
Looking at global renewables growth rates is hugely misleading. There is not one single energy transition but a series of regional transitions of widely varying form, pace and scope. The outsized materiality of one — China's — means global figures veil more than they reveal. They currently look impressive because, and only because, China's do

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In 2023, according to figures published by the International Renewable Energy Agency, China accounted for an extraordinary 63 per cent of global net additions in total renewable capacity – 298 gigawatts of the 473GW total. Even more extraordinary was its share of year-on-year growth in global additions of net capacity, which was 96 per cent. Exclude China and 2023's net additions of renewable capacity were a mere 7GW higher than in 2022. Various words could be used to describe such growth, but “exponential” is not one of them.

Most of the world's new renewable capacity comes from China

Net additions (GW)



Source: Irena

The problem is that we need rapid growth in renewable investment everywhere, not just in China. In fact, when we break down the “global” energy transition into its component regional parts, the problem looks starker still.

Consider Africa and Asia-excluding-China. These regions have the most pressing need for investment in low-carbon energy sources. Their power sectors are among the world's most fossil-fuel intensive and they are expected to lead global growth in electricity consumption. Yet they have only limited investment in renewable capacity. Between 2018 and 2023, annual net additions of renewable capacity grew by a compound annual rate of 10 per cent globally, but only by 5 per cent in Africa. Compare that with 16 per cent in China. The pace of progress is slowest precisely where it is needed most.

And so, several decades after governments around the world began to take

measures to actively support renewables investment, greenhouse-gas emissions from electricity generation — the single largest source of anthropogenic emissions but also the one thing that we know how to easily decarbonise — continue to [climb](#).

Debunking the “exponential growth” narrative is important not just because it is misleading in so far as it mistakes a Chinese story for a global one. It is also important because the narrative is politically salient and dangerous.

If we are achieving exponential growth with our existing approaches, why would we change anything about how we are presently going about things? Exponential growth bespeaks success, not failure.

Indeed, the narrative of exponential growth in renewables underpins a slew of Pollyanna-ish recent books that implicitly or explicitly endorse what are largely business-as-usual approaches to the climate crisis. More specifically, they endorse what passes for business as usual in the bulk of the world outside China, where, of course, business as usual looks notably different.

Decarbonising electricity generation as rapidly and as widely as possible surely ranks as one of humanity's most pressing tasks, not least given that the electrification of transportation, buildings and industry is at the core of existing strategies for mitigating global warming more or less everywhere.

For better or worse, policy and our economies run on narratives. The task of decarbonising is made harder, not easier, when these mischaracterise progress and fail to confront uncomfortable facts.

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