

22nd Edition World Energy Markets Observatory: India & China

In pursuit of a "better normal"

Country: **China**
Population: **1.40B**
GDP: **\$14.3T**

Country: **India**
Population: **1.35B**
GDP: **US \$2,719B**

Key Stats: China

Energy demand: **+1.1%** (1/5 the 2018 pace)
CO² emissions: **9,825 Mt**
Clean energy investments: **\$83.4B (-8%)**
Coal production: **48% of the world's total (+4.2%)**
Coal consumption: **51.7% of the world's total (+2.3%)**
Oil production: **4% of the world's total**
Oil consumption: **14% of the world's total**
Nuclear consumption: **+17.4%**
Nuclear capacity: **45 nuclear power reactors in operation | 12 under construction**

Key Stats: India

Energy demand: **+18%** (2014-19)
CO² emissions: **2,480.4 Mt**
GHG emissions: **+2%**
Share of renewables: **3.6%**
Clean energy investments: **\$11.1B**
Coal production: **8% of the world's total (-0.5%)**
Coal consumption: **18% of the world's total (+0.3%)**
Oil production: **0.9% of the world's total**
Oil consumption: **5.4% of the world's total**
Nuclear consumption: **+15.2%**
Nuclear capacity: **22 nuclear power reactors in operation | 21 under construction**

COVID-19 EMISSIONS

-25% decrease in CO² emissions in China during the COVID-19 lockdown period

-22.5% decrease in CO² emissions in India in March & April 2020

HYDROGEN

China is the world's largest hydrogen producer but relies mainly on fossil fuels.

4% hydrogen production

from water-electrolysis in China at present though the country projects **70% projected hydrogen production from renewables by 2050**

10X projected growth of hydrogen in India's energy mix by 2050

COAL

Coal dominates India's energy system — though 2019 marked the first-time electricity generation from coal decreased at -2.3%.

73%: 2019 share of coal in India

57%: 2040 projected share of coal in India

China continues to add coal generation in 2019 & Q1 2020, after easing environmental restrictions.

48 GW: New coal capacity approved in China during Q1 2020

43.8 GW: New coal capacity commissioned in 2019



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"Climate change is one of the greatest threats to long-term stability in Southeast Asia, including India and China. The lives and livelihoods of roughly three-quarters of the region's population are at risk due to their proximity to the coast or low-lying deltas. The region must make a concerted effort to mitigate this risk and also manage the challenges that have arisen from the COVID-19 crisis."

Gaurav Modi
Executive Vice President, CEO of SEA,
Hong Kong and Taiwan

About WEMO

The World Energy Markets Observatory (WEMO) is Capgemini's annual thought leadership and research report that tracks the development and performance of electricity and gas markets in Europe, North America, Australia, Southeast Asia and China. Now in its 22nd edition, WEMO examines the following topics: climate change & regulatory policies; energy transition; infrastructure & adequacy of supply; supply & final customer; transformation; financials; and, for the first time, the oil & gas industry. This edition also includes data and analysis for the first half of 2020 due to the extraordinary events related to COVID-19.

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