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The goal of research is neither to cheerlead for what you want to happen, or to whine about what you don"t want to happen should be to predict what will happen.Even when you don"t like the predictions. Hence every December we have attempted to distil our research from the previous year, into a Roadmap to Net Zero, which suggests the most likely trajectory ...

We have started building a new database covering 1,300 companies exposed to energy transition, that have been mentioned 2,000 times, across all of TSE"s research, going back to 2019. It is a resource where decision-makers can quickly navigate to all of TSE"s thematic energy transition research that has directly mentioned a particular company. The methodology ...

Our global uranium supply-demand model sees the market 5% under-supplied through 2030, including 7% market deficits at peak in 2025, as demand ramps from 165M lbs pa to 230M lbs pa in 2030. This is even after generous risking and no room for disruptions. What implications for broader power markets, decarbonization ambitions, and uranium prices?

Thunder Said Energy | 2,631 followers on LinkedIn. The research consultancy for energy technologies | Thunder Said Energy is a research firm focused on energy technologies and energy transition. We publish research reports, data, economic models and patent screens into opportunities that can meet the energy needs of the world, while removing all of the net CO2. ...

This data-file aggregates the details of different nature-based CO2 removals projects that we have been supporting at Thunder Said Energy. The average nature-based reforestation initiative that we supported in 2022 scored 70/100 on our framework. Statistical details and distributions are explored. Download

Power grids are shaping up to be one of the biggest and most imminent bottlenecks in the energy transition, for the reasons in our note here, having the consequences in our note here, and one of many reasons why new AI data-centers will need to build their own dedicated generation capacity per our note here.. A key challenge for constructing new ...

This global energy supply-demand model combines our supply outlooks for coal, oil, gas, LNG, wind and solar, nuclear and hydro, into a build-up of useful global energy balances in 2023-30. We fear chronic under-supply if the world decarbonizes, rising to 5% shortages in 2030. Another scenario is that emerging world countries bridge the gap by ramping coal.

Thunder Said Energy is a research firm focused on the energy transition. Our work looks for economic opportunities, which can drive the world towards net zero; across new energies, conventional energy, utilities, capital goods, ...

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Energy transition is a triple challenge: to meet energy needs, abate CO2 and increase competitiveness. History has now shown that ignoring the part about competitiveness gets you voted out of office?! We think raising competitiveness will be the main focus of the new administration in the US.

Posted on March 7, 2024 March 11, 2024 by Thunder Said Energy. Power grids: the biggest bottleneck in the world? Power grids will be the biggest bottleneck in the energy transition, according to this 18-page report. Tensions have been building for a decade. ... The crucial conclusion is that interconnecting large new loads -- wind, solar, data ...

We have started building a new database covering 1,300 companies exposed to energy transition, that have been mentioned 2,000 times, across all of TSE"s research, going back to 2019. It is a resource where ...

Human civilization will consume 80,000 TWH of useful energy in 2023. This is equivalent to a kitchen toaster, running 24 hours per day, 365 days per year, for every man, woman and child on the planet. 35% of global energy is used in manufacturing and materials, 30% is used in transportation and shipping, 20% is used in homes as heat and electricity, and 15% is used in ...

The data are disaggregated across electric vehicles, new vehicle types, consumer electronics, grid-scale batteries and conventional material uses. $499.00 - Purchase Checkout Added to cart Demand for lithium has already trebled from 23kTpa in 2010 to 65kTpa in 2020, while we see the ascent continuing to 400kTpa in 2030 and 1.5MTpa in 2050.

Our research in 3Q24 has wondered whether EV sales might saturate at 15-30% of developed world vehicle sales through 2030, due to total costs of ownership and challenges reaching cost-competitiveness.This means our latest vehicle forecasts only see 40M EV sales in 2030, down from 65M envisaged a year ago.. The aim of this 14-page report is to look through our ...

Electricity Prices and CO2 Intensity Data. Retail electricity prices average 11c/kWh globally, across 28,500 TWH of global electricity demand in 2021, which is mostly composed of electricity consumption in 80 larger countries. The lower quartile is 7c/kWh and the upper quartile is 17c/kWh. The lower decile is 4c/kWh and the upper decile is 22c/kWh.

World"s largest energy assets by type. The size and risk of global energy assets are assessed in this data-file, which focuses in upon the largest energy assets in the world, the energy derived from them (in TWH) and their resultant risk profiles. ...

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