

3 ???· Most long-term energy forecasts simply lack imagination. In particular, most energy transition scenarios leave little room for new demand, which is why AI was a shock in 2024. But what if civilization was capable of harnessing vastly more energy? The Kardashev scale was proposed by Nikolai Kardashev, in 1964. It measures the technological ...

Its ambition is to use wood residues to create carbon-negative plastics, cost-competitively with petroleum products and capture a "\$1trn market opportunity".. Our patent analysis shows Origin has visibly been focused on 5-chloro-methyl furfural as a building block. For example, CMF can be reduced to MF (loss of chlorine), further reduced to DMF (loss of OH) and then combined ...

Silicon carbide material is one of the hardest crystalline composites known to mankind, with an enormously high melting point of 2,700°C and very high chemical resistivity. Hence it is used in the steel/metals industry, aerospace, brake pads of high-end automobiles and bullet proof vests. Silicon carbide material is made by super-heating high-grade silica (SiO₂) with petcoke (C) in ...

Electric vehicle sales by manufacturer are also disaggregated for 9M BEVs and 4M PHEVs sold in 2023 D and Tesla together sold 40% of the world's EVs, while the top 10 list accounts for 75% of EVs and also includes VW, Stellantis (due to the Fiat 500e and Peugeot e-208) and GM (due to the Chevy Bolt range).. 2024 has seen weaker momentum for electric vehicles.

To contextualize the growth that lies ahead, we have compiled data on US power generation installations, year by year, technology by technology, running back to 1950, including implications for turbine manufacturers, on pages 14-16.. The impacts of AI on US gas and power markets sharply accelerate US electricity demand, upgrade our US shale forecasts, especially ...

3 ???· Posted on December 11, 2024 December 11, 2024 by Thunder Said Energy. Energy transition: classic blunders?! Classic blunders famously include "never start a land war in Asia" and "never go up against a Sicilian when death is on the line". But this video sets out what we believe are the three classic blunders that should be avoided by ...

The energy uplifts from solar trackers have been estimated at 10-50% in different studies. But we can do better than this broad range, and actually calculate both the energy uplift and the revenue uplift from first principles, on pages 5-8. The economics of solar trackers can therefore be modeled more effectively.

Today's lithium ion batteries have an energy density of 200-300 Wh/kg. I.e., they contain 4kg of material per kWh of energy storage. Technology gains can see lithium ion batteries" energy densities doubling to 500Wh/kg in the 2030s, trebling to 750 Wh/kg by the 2040s, and the best possible energy densities are around

1,250 Wh/kg.

This is a simple model calculating the economics of a typical rooftop solar water heater, which can save around 1T of CO2 per household per year and lower water heating bills by 50-80%.. Economics are more challenging, due to high upfront capital costs, which are quantified in the data-file. Under our base case estimates, it would require a CO2 price of around \$130/ton, to ...

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The other angle that excites us in energy commodities is rising volatility, linked to geopolitics, and the ramp of volatile wind and solar, whose regional output varies +/- 10% per year, and whose global output varies +/- 5% per year. This creates volatility in demand for backups - e.g., LNG - and greater regional arbitrage potential.

This database contains a record of every company that has ever been mentioned across Thunder Said Energy's energy transition research, as a useful reference for TSE's clients. The database summarizes over 3,000 mentions of 1,400 ...

110MTpa of global hydrogen is produced today, emitting 1.3GTpa of CO2, costing \$0.8/kg. The market grows to 220MTpa by 2050, mostly blue H2, at \$1.2-1.5/kg, per our hydrogen outlook, which is re-capped on page 2.. But what if gold hydrogen could be recovered from the subsurface of the Earth, analogous to the development of natural gas? Could the ...

Some commentators argue that energy demand will naturally plateau as GDP rises in the future - or at least the beta between energy use and GDP will fall dramatically. As evidence, the energy consumption within developed world countries has hardly increased over the past 20-years, even as GDP per capita rose by 25%.

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?

1,500 companies have been mentioned 2,500 times in our research since 2019, and our energy transition research now includes over 1,400 research notes, data-files and models. Hence this report is part of a quarterly series summarizing the key conclusions across our work. In 1H24, the #1 theme that has excited the entire energy world has been the rise of AI.

Web: <https://solar-system.co.za>

