

世界の脱炭素 変化とスピード

経済対策としての脱炭素

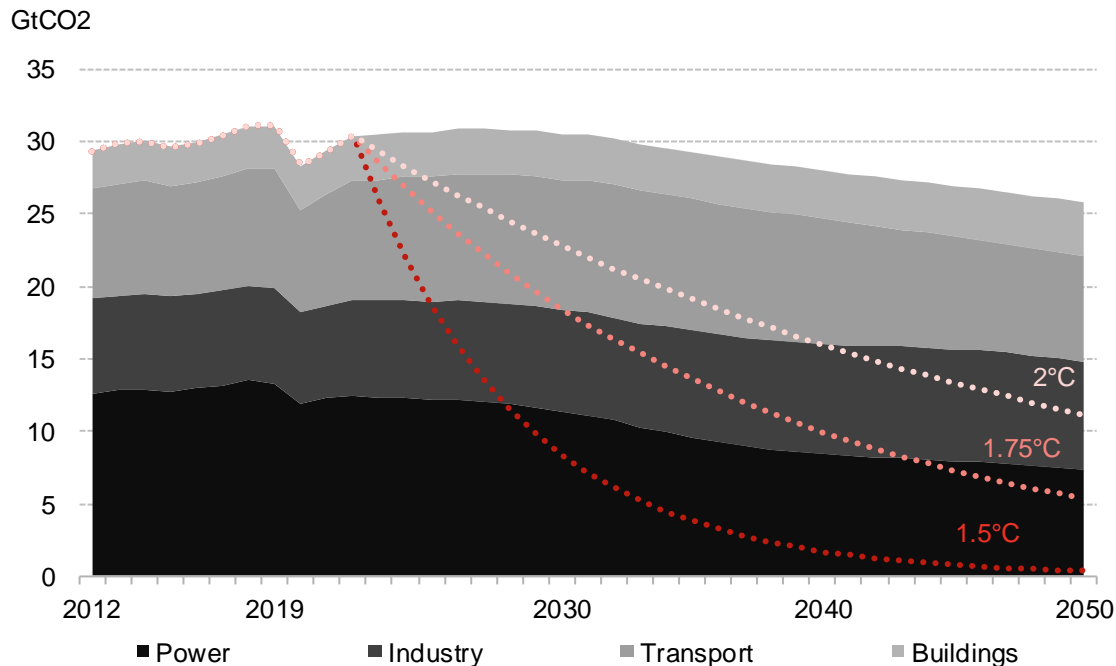
ブルームバーグNEF

在日代表

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2021年3月31日

排出量削減はこの10年が最大の焦点 中間目標設定が必要不可欠

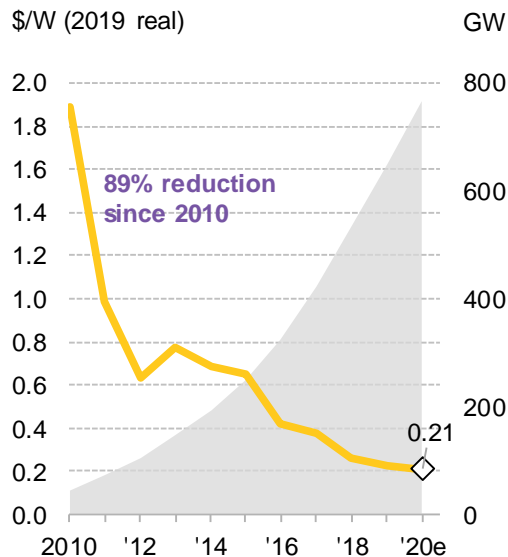


Source: BloombergNEF

- 世界の排出量予測(経済的分析結果)
- パリ協定の2度目標やそれ以下の目標値には程遠い
- 経済合理的に排出量削減を行うには限界がある
- 政策介入が必要不可欠
- 再生可能エネルギーの導入が最優先

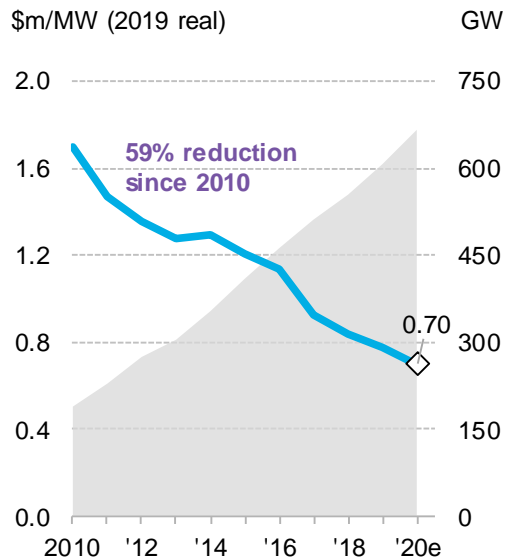
再生可能エネルギー機器コストは世界で急低下

太陽光発電モジュール価格 累積導入量



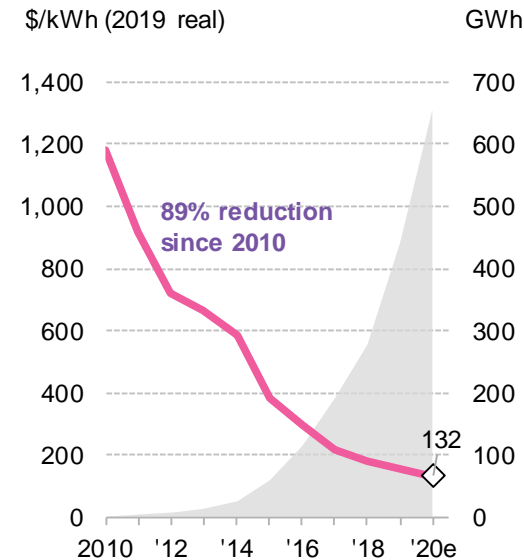
Source: BloombergNEF

陸上風力発電タービン価格 累積導入量



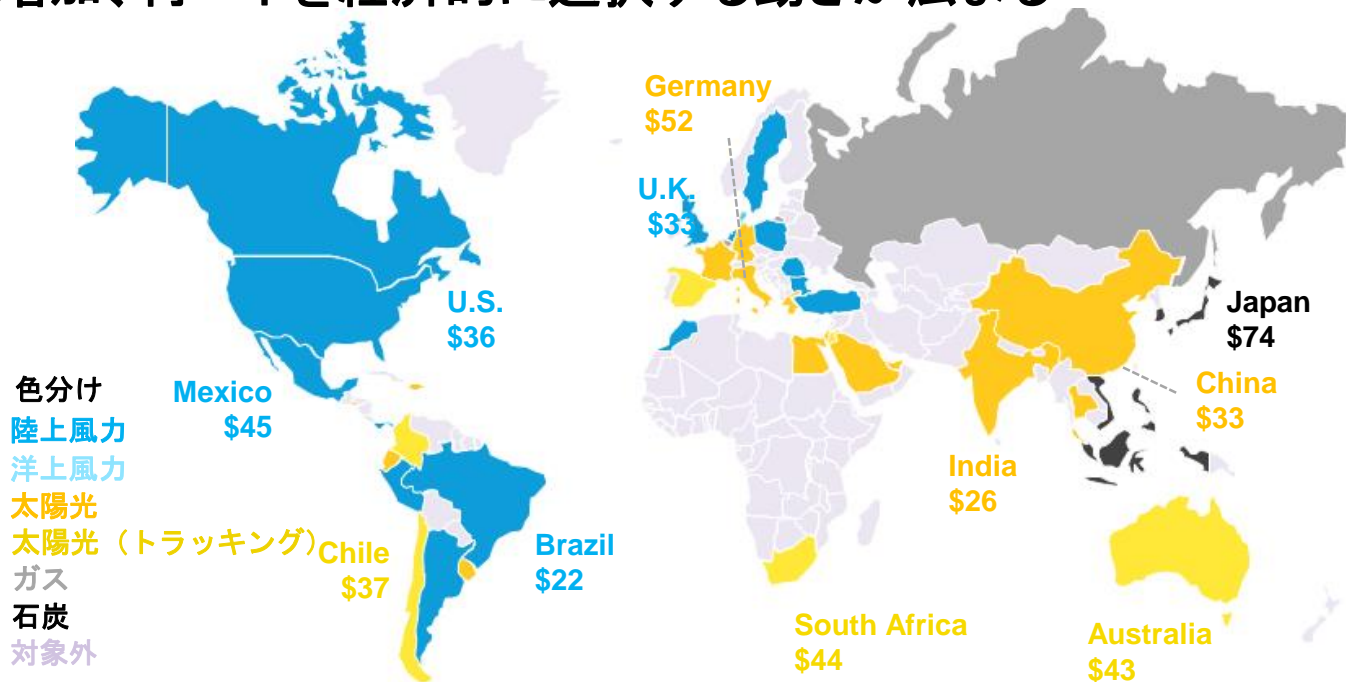
Source: BloombergNEF

リチウムイオン電池価格 累積需要



Source: BloombergNEF

新設発電所にて再エネが最安の国は世界の3分の2に増加、再エネを経済的に選択する動きが広まる



色分け
陸上風力
洋上風力
太陽光
太陽光 (トラッキング)
ガス
石炭
対象外

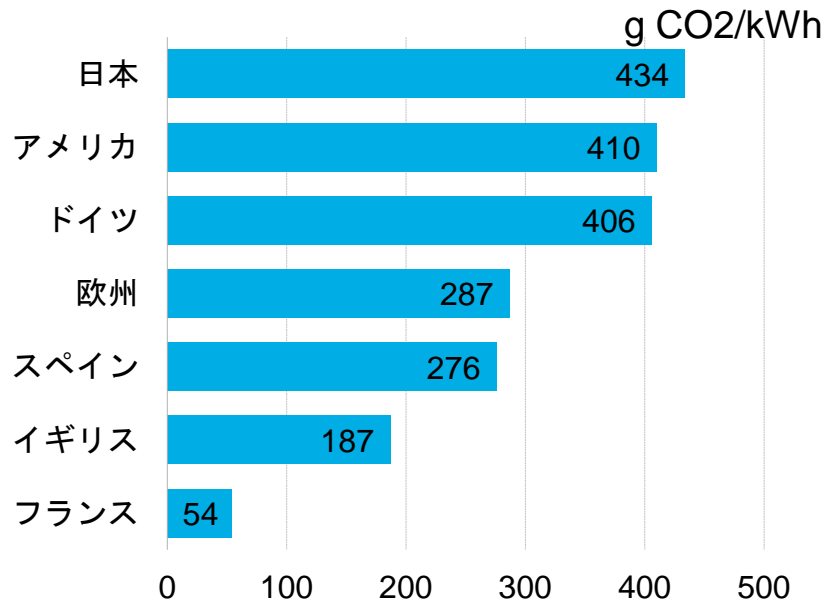
- 日本は2025年以降に再エネが新設石炭より安価に
- タイは2020年太陽光が最安に、半年前まで石炭最安
- その他東南アジア諸国も追随

Source: BloombergNEF. Note: The map shows the technology with the lowest LCOE for new-build plants in each country where BNEF has data. The dollar numbers denote the per MWh benchmark levelized cost of the cheapest technology. All LCOEs are in nominal terms. Calculations exclude subsidies, tax-credit or grid connection costs. CCGT is combined-cycle gas

気候変動は経済政策

日本の電力使用からの排出量は各国に比べ多く、日本は企業の立地として選ばれにくくなっている

電力使用当たりの二酸化炭素排出量



Source: BloombergNEF

再エネは商取引の条件に

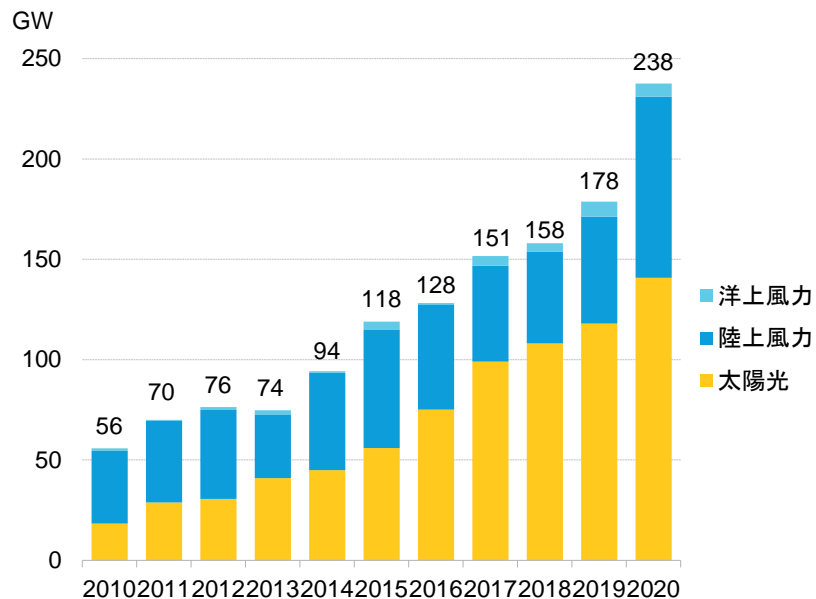
- アップルなどの環境意識の高い企業が日本企業を含むサプライヤー企業に対し、**電気使用量すべてを再生可能エネルギーで賄うよう要請**(再エネ調達)。**商取引の条件**となっている
- 再エネ調達できなければ取引が失われる
- 環境志向の高い会社から日本企業が得ている売上高総額は**約7.5兆円**(BNEF推計)
- **最大約7.5兆円の経済損失**を生まないために、**再生可能エネルギーの普及と企業に対する再エネ調達方法を増やす政策が急務**

結論：

- 2050年ネットゼロ達成のためには、**野心的な中間目標を早期に設定することが重要**
- 再生可能エネルギーは今取り掛かることのできる脱炭素への最も有効、かつ現実的な策であり、優先されるべき。
- 再生可能エネルギーの調達が商取引の慣行となり、最大約7.5兆円の経済損失の可能性
- 再生可能エネルギーによる脱炭素は日本経済の切り札

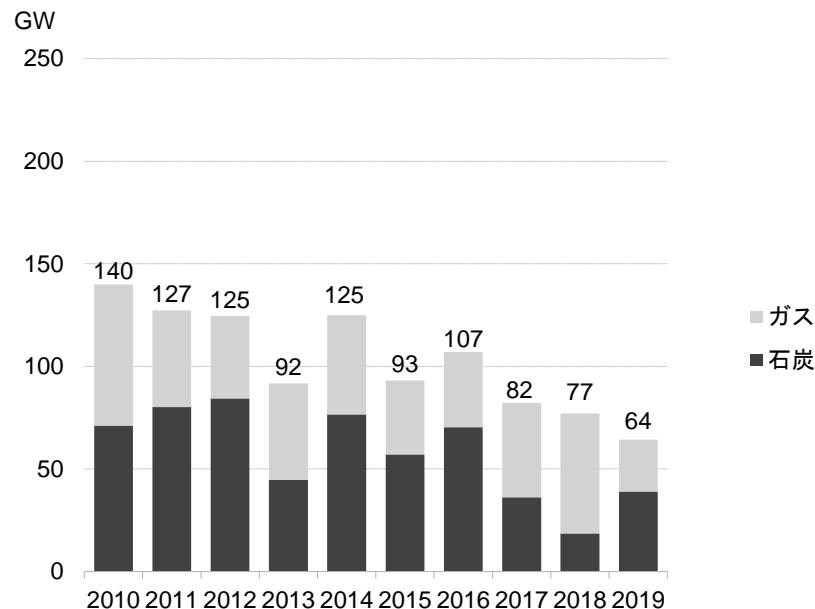
参考資料1：排出量削減の有効策の一つが再生可能エネルギーの導入であり、世界では導入量が増加

再生可能エネルギー導入量



Source: BloombergNEF

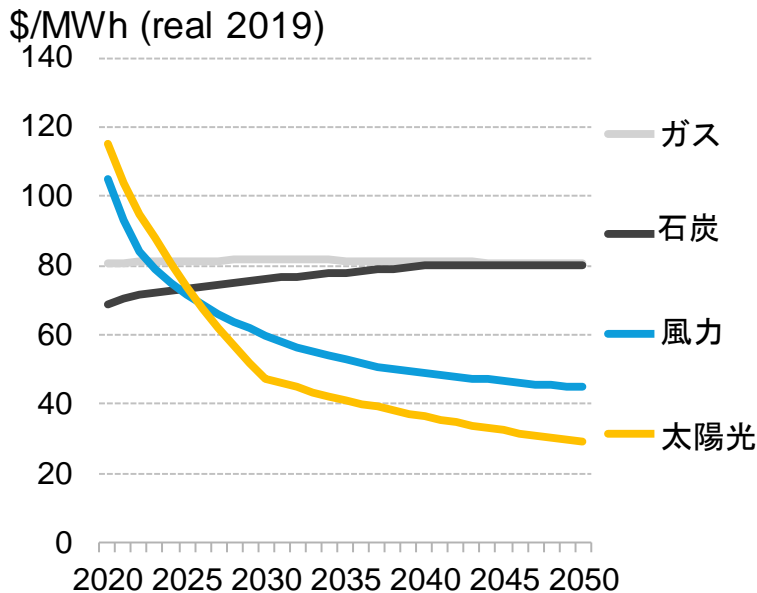
化石燃料火力発電導入量



Source: BloombergNEF

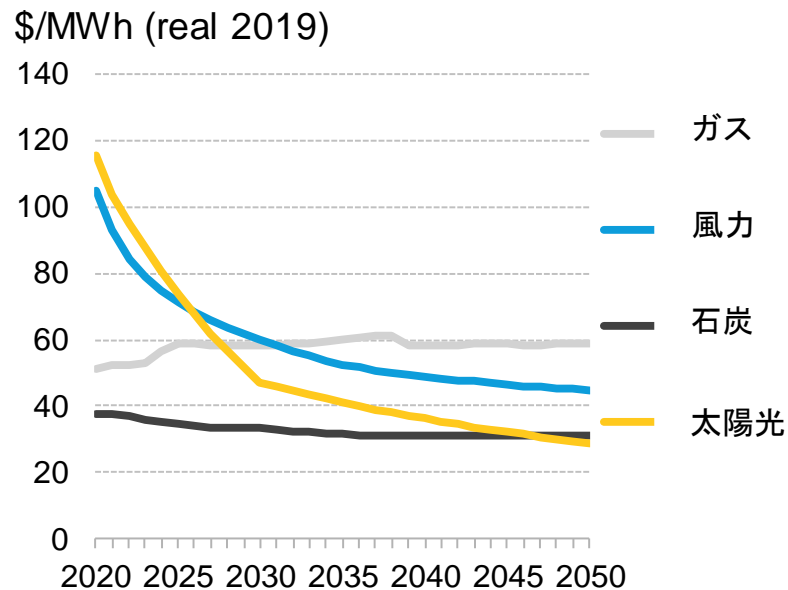
参考資料2：日本の再エネ2025年以降新設石炭火力より安価に 既設石炭火力より2040年代後半まで安価にならない 日本の大きな再エネポテンシャルを生かした制度設計が重要

新設再エネ 対 新設火力



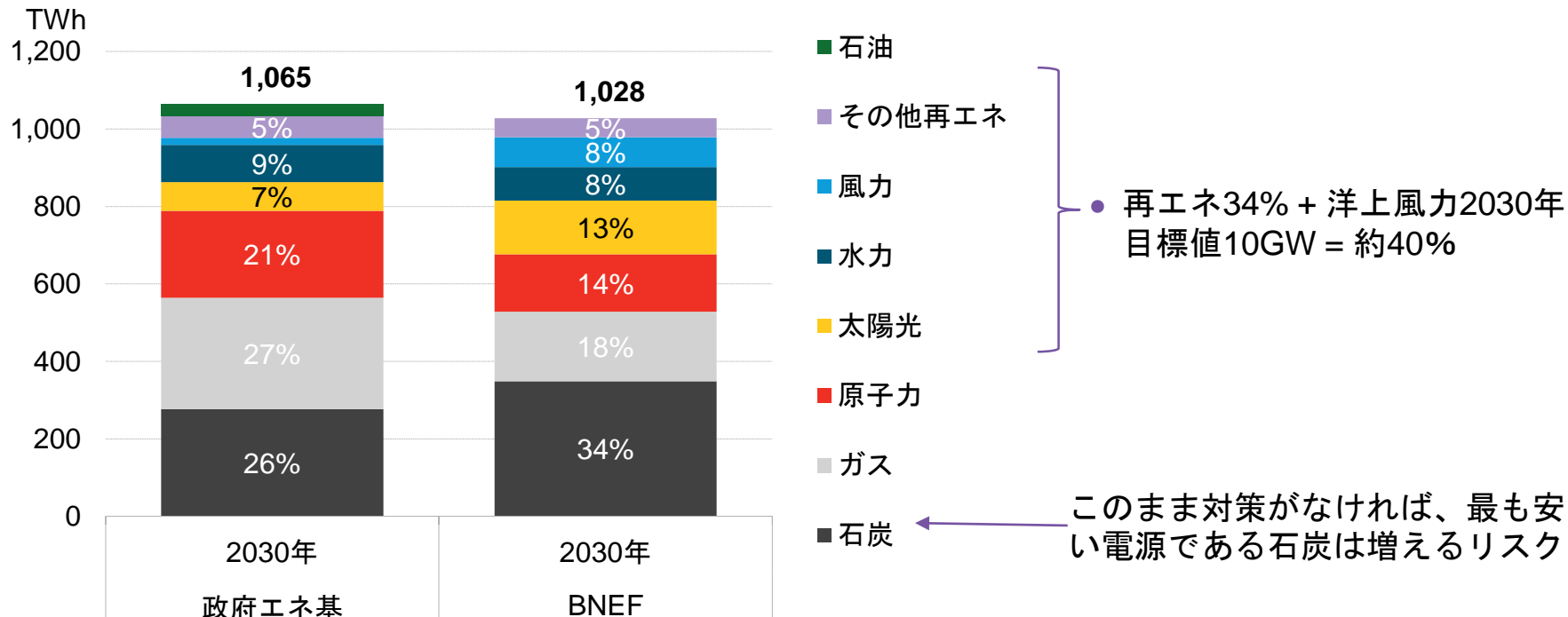
Source: BloombergNEF

新設再エネ 対 既設火力



Source: BloombergNEF

参考資料3: 2030年、約40%の再エネ導入は可能(当社推計) 石炭火力削減と、再エネの野心的な目標値の設定が重要



Source: BloombergNEF Notes: This analysis was based on BNEF's New Energy Outlook 2019.

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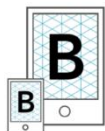
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