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How will China change the global energy equation in the next five years?

JEFFREY BALL: Over the past decade, China has radically changed the global energy equation. Over the next five years, China will continue to change it, in subtler but potentially even more sweeping ways.

China already is the largest and most important kid on the global energy block—larger and more important, it's worth noting, than the U.S. It's the world's biggest energy consumer, biggest coal burner and biggest carbon-dioxide emitter. It has more people than any other country. And those people—like most people on the planet—want to be wealthier, which usually means using more energy.

China will continue to change global energy over the next five years in three particularly important ways.

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First and most obviously, China will consume. According to the International Energy Agency, China will, by a long shot, account for the world's greatest increase in the consumption of coal and nuclear energy. It already has become the world's biggest wind-power producer, and many people expect it in the next year or so to become the world's biggest solar-power producer too.

Second, China will manufacture. It is selling energy-producing equipment around the world, and the quality of that equipment is improving. That is scaring energy-equipment producers in the U.S. and elsewhere. Over the next five years, China's global sales of energy-producing equipment are likely to roil the global energy-equipment industry even more.

Third, China will innovate. Thus far, in energy as in many other industries, China has been mostly a low-cost manufacturer. That's changing. China's central government has prioritized energy innovation in its current five-year plan, and even if that aspiration today remains more rhetoric than reality, China is spending heavily to implement it. China has, for instance, been ramping up its investments in U.S. and European energy-technology companies. That trend likely will intensify.

Jeffrey Ball (@jeff_ball), formerly The Wall Street Journal's environment editor and a longtime energy reporter at the paper, is scholar-in-residence at Stanford University's Steyer-Taylor Center for Energy Policy and Finance, a joint initiative of Stanford's law and business schools. He writes about energy and heads a project exploring the relationships among countries in the globalizing clean-energy industry.

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