

GREEN AMMONIA: KEY FOR THE GERMAN ENERGY TRANSITION

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CLIMATE



ENERGY



DIPLOMACY



FINANCE



RESOURCES



ECONOMY

GERMANY ACCELERATES THE ENERGY TRANSITION IN RESPONSE TO THE ENERGY CRISIS

Renewable energy*



Electricity generation: + 11%



Expansion of installed capacity PV: + 31%



Expansion of installed capacity wind onshore: + 9%

Buildings & energy efficiency



Share of heat pumps in the heating structure: + 7%**



Reduction of gas consumption by households: - 16.7%*



Reduction of gas consumption by industries: - 14.6%*

Diversification of energy supply

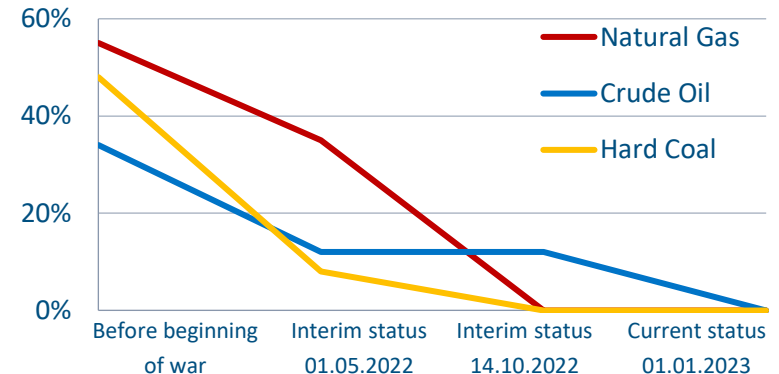


Temporary LNG infrastructure will be H2-ready

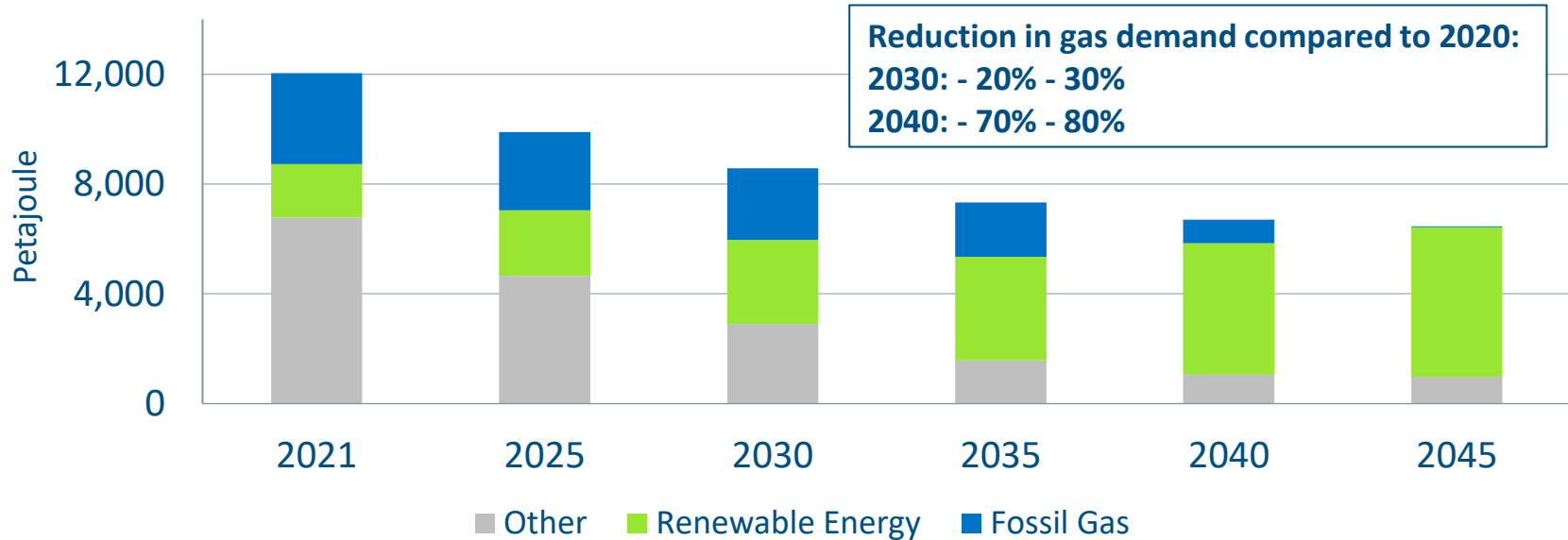


Restructuring energy imports and thinking about the fossil-free future:

Development of energy imports from Russia



GERMANY WILL RAPIDLY PHASE OUT GAS AND EXPAND RENEWABLES



THE UPDATED HYDROGEN STRATEGY SETS KEY TARGETS AND DEFINES ACTIONS



- **Demand:**
 - 2030: 95-130 TWh (hydrogen and derivatives)
 - expectations for 2045: Industry sector: 290-440 TWh; Electricity sector: 80-100 TWh
- **2030 key targets:**
 - Domestic electrolysis capacity: 10GW
 - Establish diversified supply & avoid new dependencies
 - Establish sustainability standards
 - Become technology partner for exporting countries
 - Build hydrogen start network with more than 1.800km by 2027/28
 - All major H2 centers to be connected to consumers
 - Establish key hydrogen demand in industry, transport and electricity
 - Create appropriate regulatory framework
 - CO₂ pricing as guiding instrument & additional funding for green H2

WHAT'S THE ROLE OF AMMONIA?

- Broad acknowledgement that ammonia is the most practical vector
→ large volumes of shipped ammonia necessary
- Concrete measures:

Ammonia import terminals



H2 / ammonia sprinter power plants



Funding for supply and demand

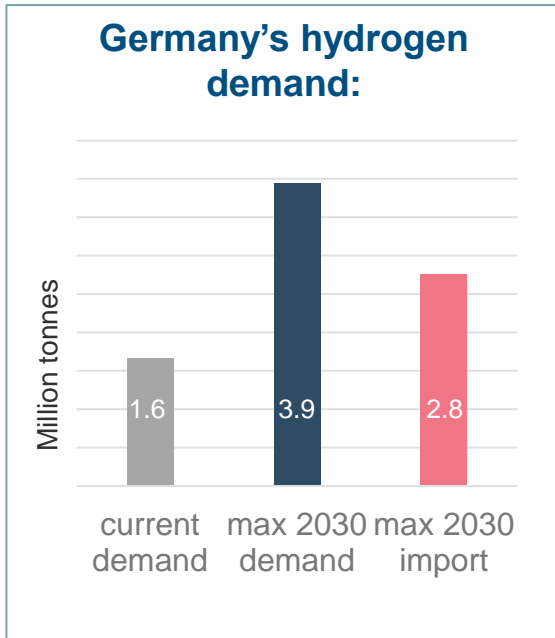


The German Carbon Contracts for Difference (CCfD) scheme

June 6, 2023

Source: adelphi 2023 based on BMWK 2023

WHAT'S THE ROLE OF AMMONIA FROM AUSTRALIA?



Massive demand for imports of H2 and derivatives



Hydrogen import strategy is expected by the end of this year



(Big) part of imports expected via ship

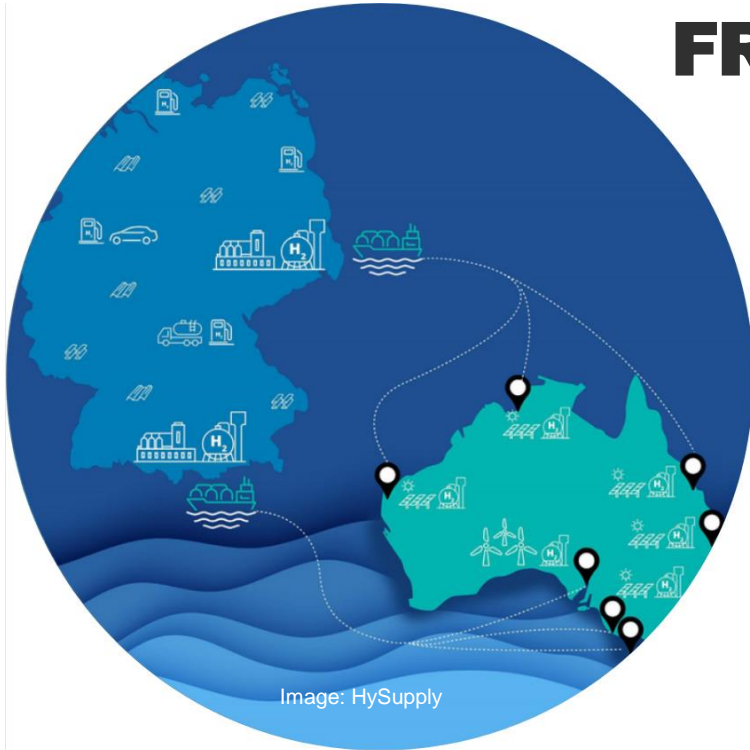


Transport costs negligible if you are looking at shipping (→ HySupply)



Diversified supplier base important and valued (good guy premium)

WHAT DO WE NEED FROM AUSTRALIA?



AND WHAT DOES AUSTRALIA NEED FROM GERMANY?

WHAT IS GOING ON TO SUPPORT A BILATERAL HYDROGEN / AMMONIA PARTNERSHIP?

Australia-Germany
Hydrogen Accord



Bilateral feasibility
study HySupply



Several focal points for the cooperation
at adelphi, the German-Australian
Chamber (AHK) and Austrade



High-level events, delegation trips
and visits

Networking opportunities
and match-making to support
industry cooperation



TrHyHub Cooperation in Oakajee, WA



Knowledge sharing and build-up through
info sessions, briefings and studies

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