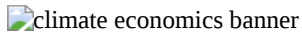


Climate Economics

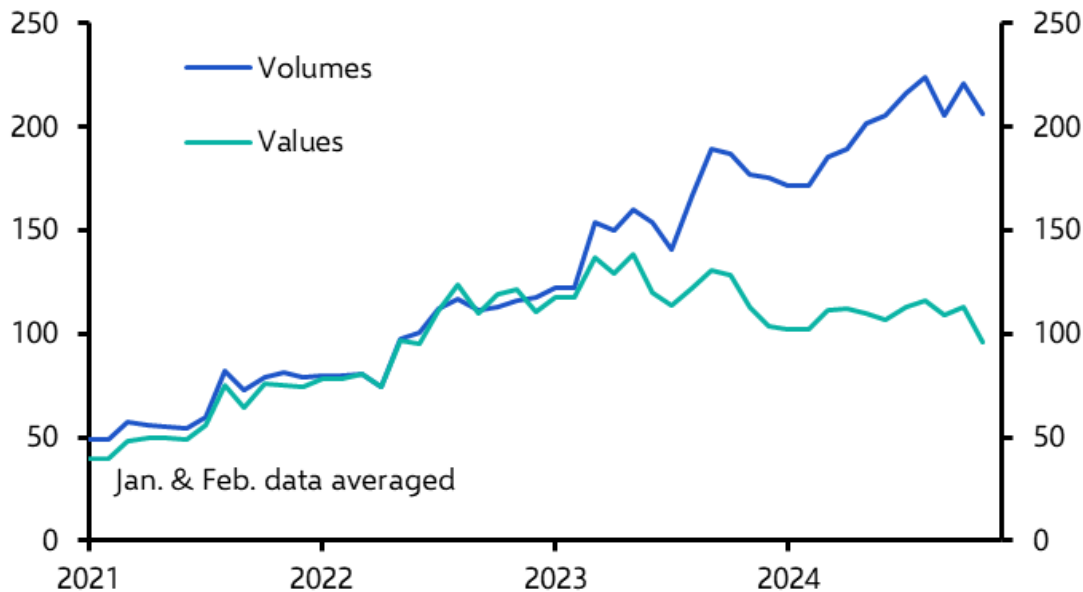
climate economics banner

Climate Economics

The macro and market implications of global warming and green transitions

Our Climate Economics coverage provides a top-down view of the impacts that climate change – and the steps taken to mitigate it – will have on macroeconomic performance over the coming decades. This includes examining which countries stand to win and lose the most from the energy transition, the likely impacts on inflation and public finances, and the broader effects on other variables such as commodities and currencies.

Key Insights



[Climate Economics Update](#)

[Tariff front-running holds up China green tech exports](#)

[China's exports of the "New Three" held up in November, although this was solely due to the strength of lithium-ion battery exports to the US as firms prepare for the imposition of tariffs. Looking...
20th December 2024 · 2 mins read](#)

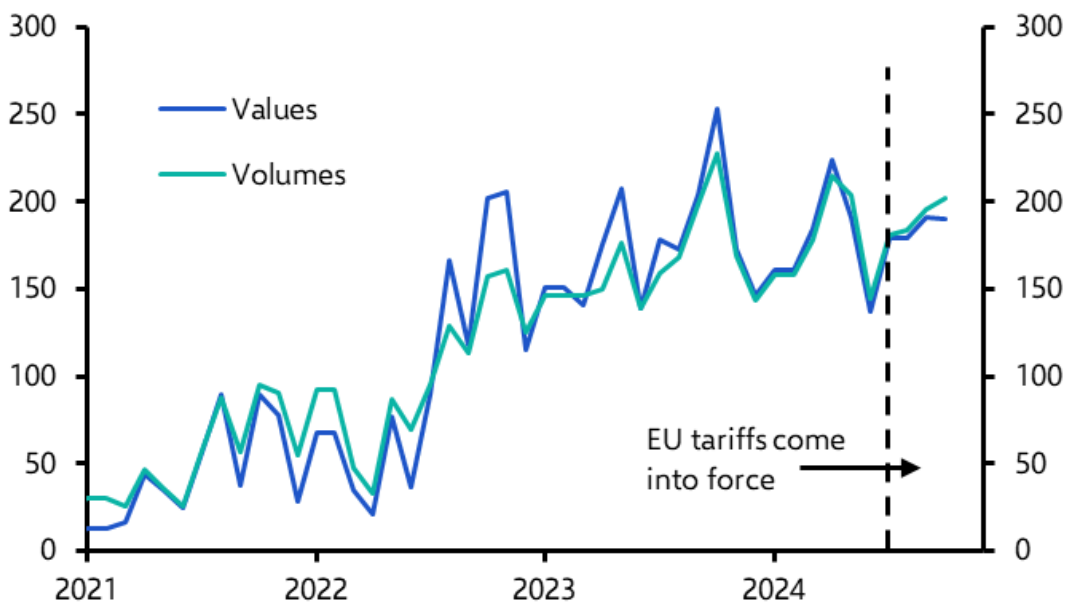


[Commodities Outlook](#)

[Weak market fundamentals; geopolitics the wildcard](#)

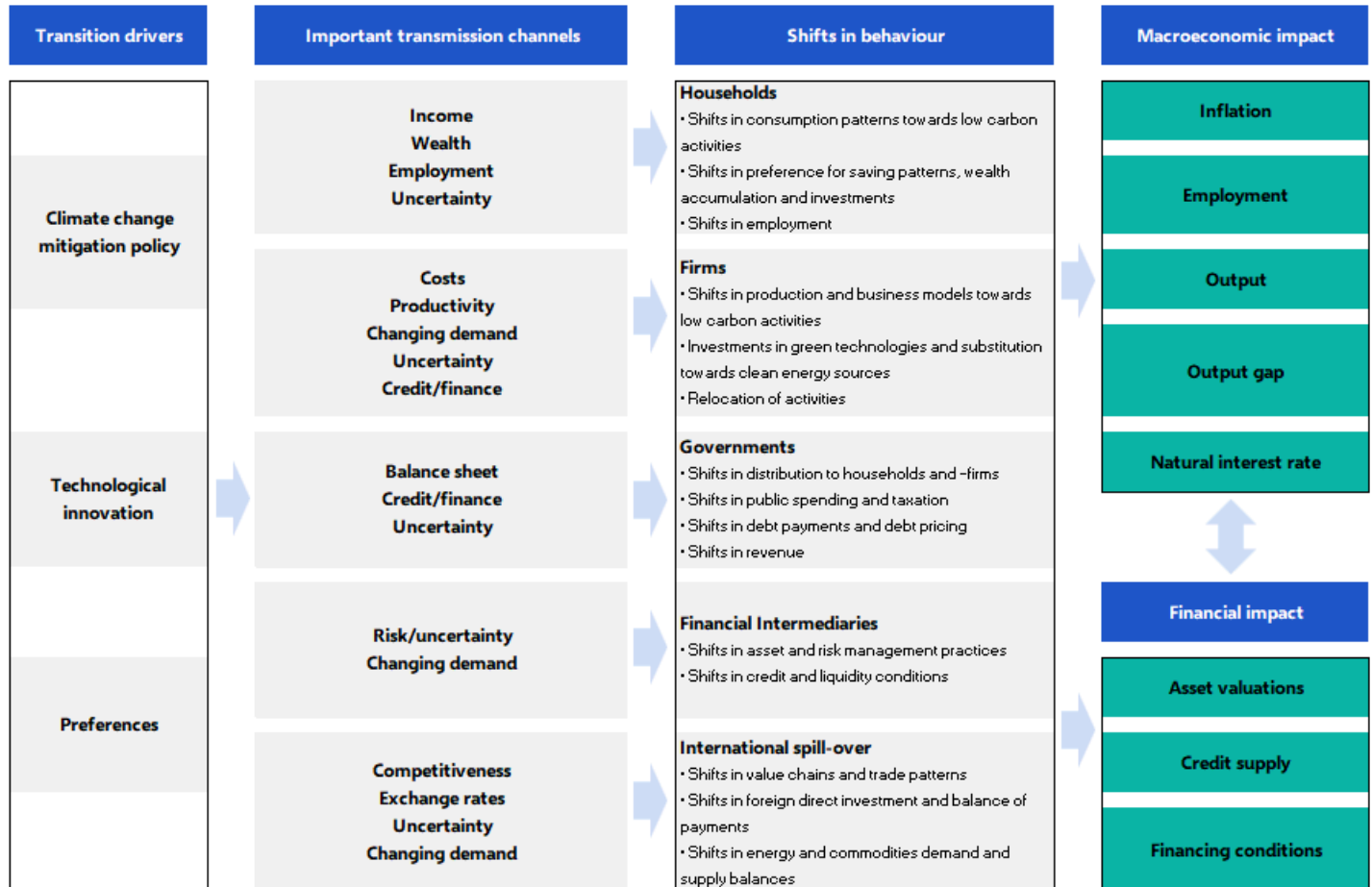
[Most energy and industrial metals prices will fall in 2025 as structural headwinds to demand build and supply rises. Geopolitical developments remain a key uncertainty and it is easy to think of...](#)

[13th December 2024 · 23 mins read](#)



[States to defy Trump; COP29 wrap-up; EV crossroads](#)

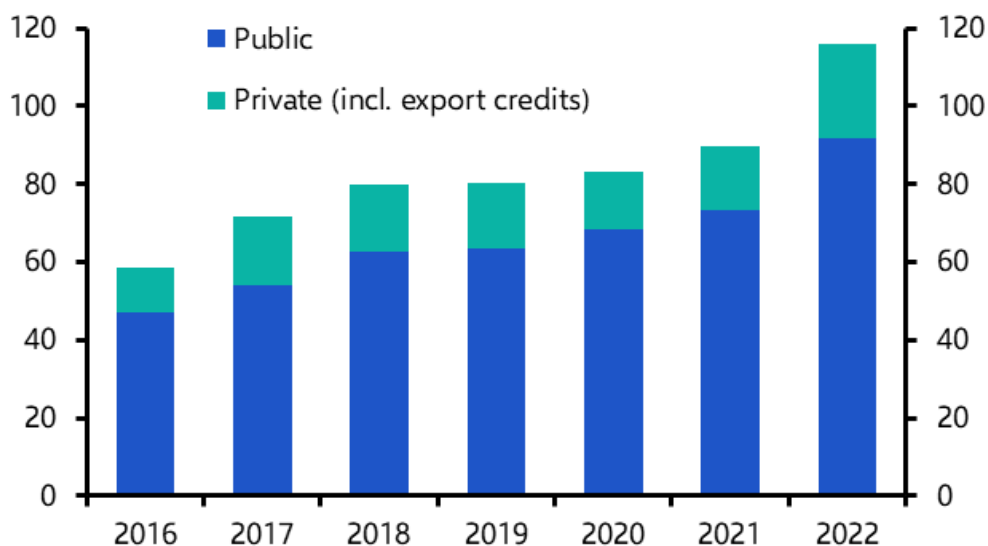
[Trump's election victory means that states will have to take the lead on climate policy to push the green transition forward, as progress on the federal level looks unlikely. Meanwhile, weakness in... 29th November 2024 · 5 mins read](#)



[Climate Economics Focus](#)

[Transition impacts in the spotlight](#)

[The fact that climate mitigation policies can manifest themselves in a range of macroeconomic outcomes will make it difficult for central bankers to know how to respond appropriately. Meanwhile, the... 27th November 2024 · 15 mins read](#)



[Climate Economics Update](#)

[Insufficient climate finance supply hit in EMs](#)

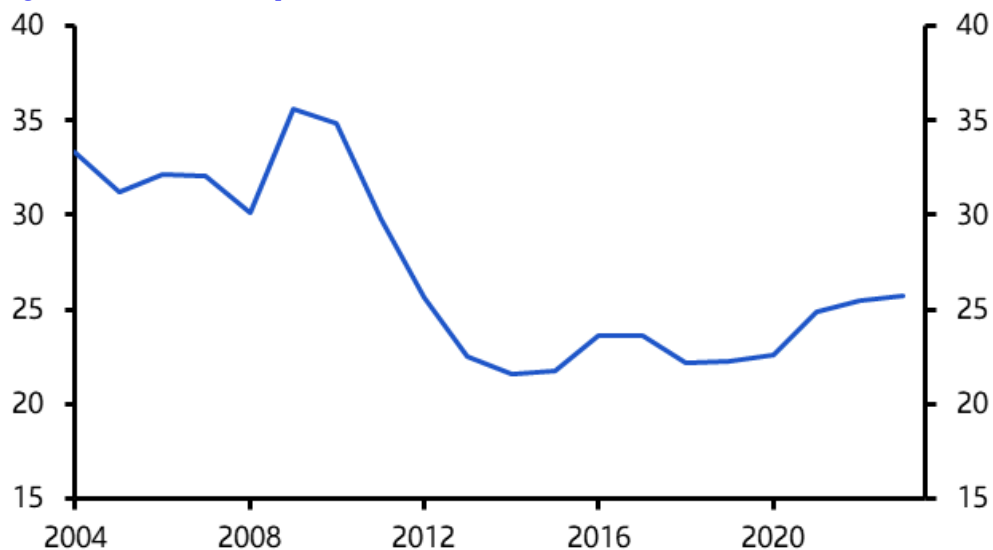
[The failure of COP29 to deliver on ambitious climate finance targets means that developing economies still lack sufficient low-cost finance for climate adaption. That leaves them reliant on debt-based... 27th November 2024 · 3 mins read](#)

[Event](#)

[Drop-In: US climate policy under Trump: The IRA, Musk and 'drill, baby, drill'](#)

[4th December 2024, 3:00PM GMT](#)

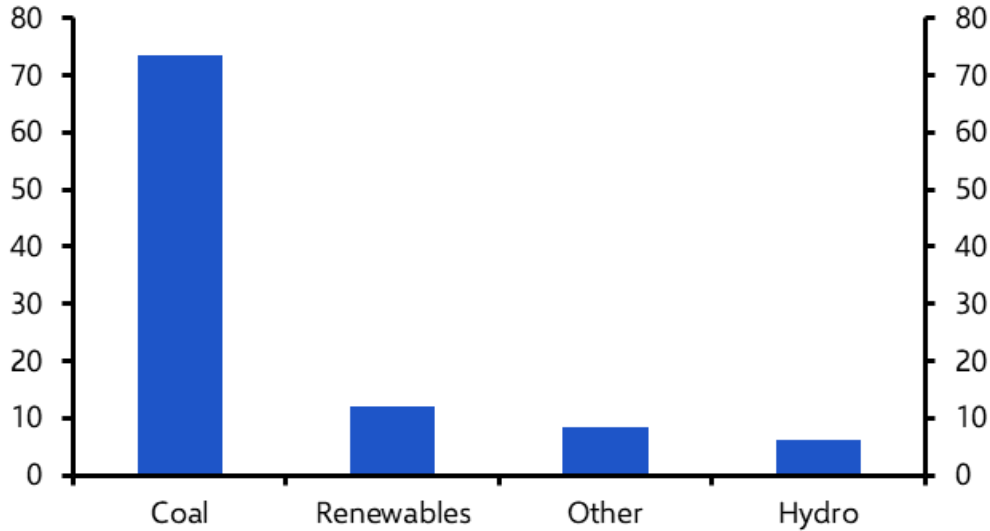
[What will a second Trump presidency mean for the green transition? Should investors and companies expect an across-the-board rollback on regulation? What does the presence of Elon Musk in the...](#)



[Climate Economics Update](#)

[What have we learnt about Trump's climate policy?](#)

[Unsurprisingly, a second Trump presidency will support oil and gas production while rolling back environmental regulations. The fate of the Inflation Reduction Act is less certain, given that the...](#)
22nd November 2024 · 5 mins read

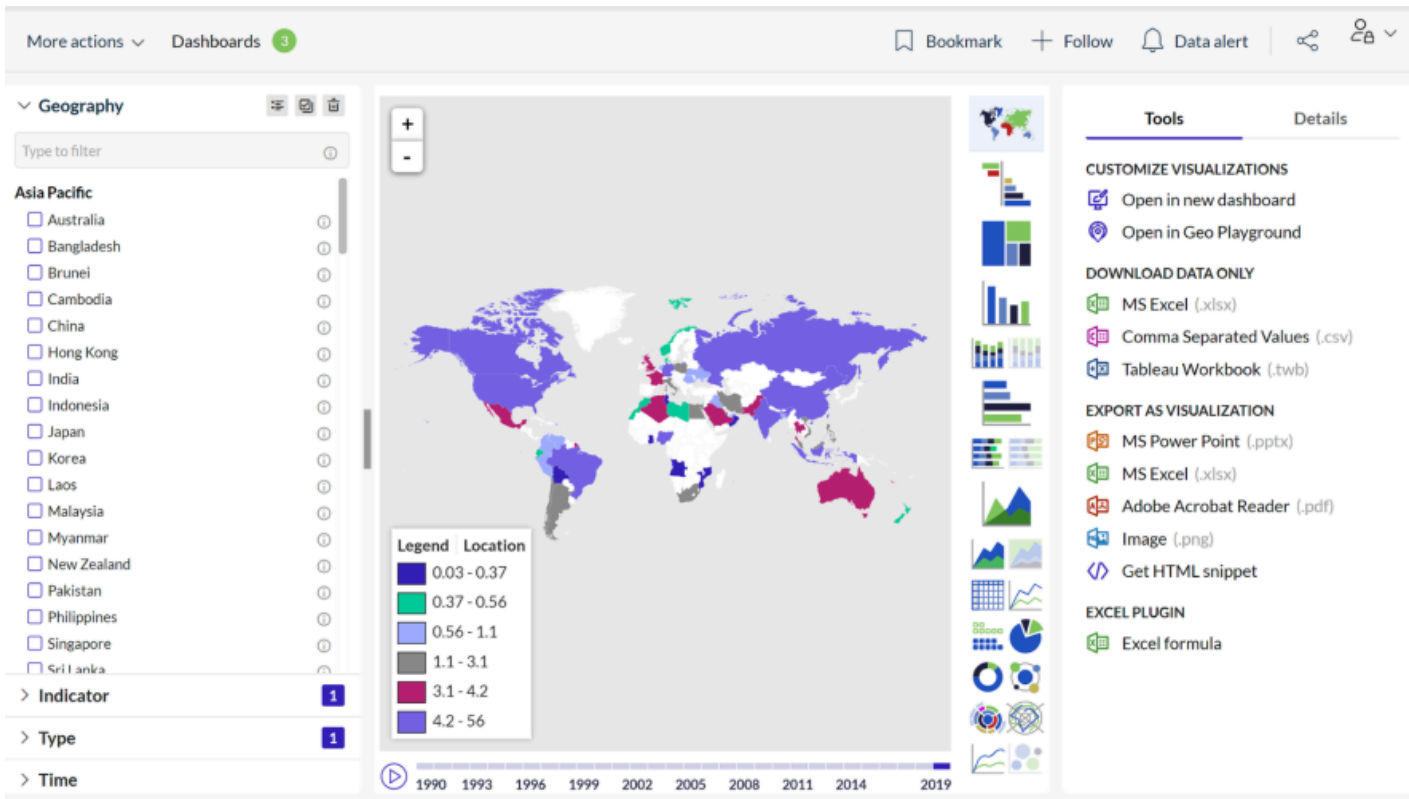


[India Economics Weekly](#)

[Air pollution, friendshoring, Governor Das to stay?](#)

[Air quality levels in India have been among the worst on record this week and the country's reliance on coal suggests that this will remain an economic headwind for a long time to come. Otherwise...](#)
22nd November 2024 · 4 mins read

Interactive Data and Charts



[CLIMATE ECONOMICS](#)

[Climate Databank](#)

[Our Climate Databank contains an extensive comprehensive range of climate-related indicators, including country and sectoral breakdowns of CO2 and other greenhouse gas emissions, and the roll-out of renewables and electric vehicles.](#)

Details

Climate Economics | 3rd October 2022



Climate Economics