

# Closing in on *No New Coal*: The Final Push

## TURNING A DECADE OF PROGRESS INTO THE END OF NEW COAL POWER

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In the decade since the Paris Agreement was signed, the pipeline of planned coal capacity has collapsed worldwide. No New Coal has become the norm across the world: 164 countries have no prospective coal capacity, and in 2025, stalled and cancelled coal proposals led to a record low in the number of countries proposing or building new coal plants. However, a small group of countries continue to keep new coal on the table. While planned coal power has fallen by 65% since 2015, prospective capacity is still over 400 GW. China in particular remains a global outlier, accounting for over 60% of planned capacity, despite its unparalleled rollout of clean energy making new coal power unnecessary. As countries look to COP30 and to addressing the expected emissions gap, the final push towards No New Coal remains key.

Progress on the energy transition is unstoppable. In 2025, stalled and cancelled coal proposals have led to a **new low in the number of countries proposing or building new coal plants**, and record renewables deployment continues at pace. However, as countries gather for COP30, it is simultaneously evident that national climate plans (NDCs) submitted this year will be insufficient for a global pathway to limit warming to 1.5°C.

**Achieving the global No New Coal milestone** remains an essential step to stay within 1.5°C and drive the broader transition away from fossil fuels in the global energy system, as agreed by all countries under the Global Stocktake (GST) at COP28.

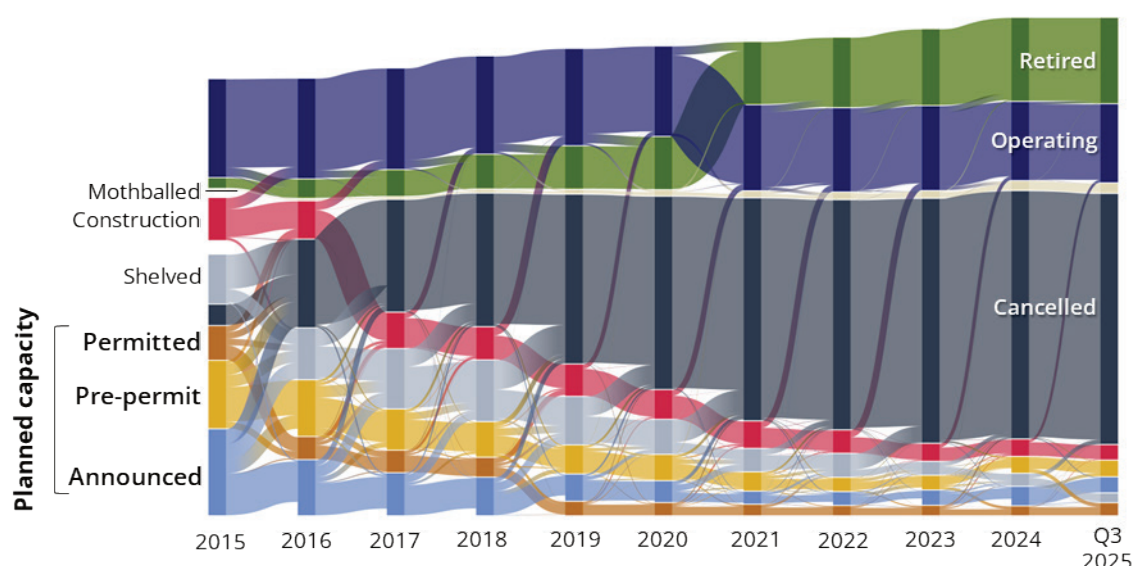
A decade after the Paris Agreement, the world has made remarkable progress in moving away from coal power. **No New Coal is now the norm in 164 countries, covering more than two-thirds of the global economy.** We are at a global tipping point: in the first half of 2025, renewable power generation surpassed coal power in its share of the global

electricity mix for the first time.<sup>1</sup> In China – the main global driver of continued coal power expansion – electricity generated from new wind, solar, and nuclear capacity was sufficient to meet total demand and reduce coal power output in the first half of 2025.<sup>2</sup>

However, **the last push towards No New Coal is still needed**. While primarily concentrated in just a few countries, there is still more than 400 GW of new coal capacity in the global pipeline. Renewable energy deployment is breaking records every year but is not yet displacing fossil fuel generation at the pace required – a challenge that will only grow if new coal power capacity keeps coming online. As countries consider steps to address the NDC gap and go beyond existing commitments at COP30, **ending new coal power is a critical action** to avoid further fossil-fuel infrastructure lock-in and instead boost investment in clean and resilient power systems.

This briefing sets out progress on achieving No New Coal and highlights the challenges that still must be addressed to ensure a just, orderly transition away from coal as part of the broader transition away from all fossil fuels.<sup>3</sup>

## Change in the global coal landscape since 2015



**Source:** E3G analysis of Global Energy Monitor (GEM) Global Coal Plant Tracker – October 2025 release. (This chart displays only those projects whose status has changed at least once within the past decade.)

**Figure 1:** The global pipeline of planned coal plants has collapsed by 65% in the last decade, many having now been cancelled rather than coming into operation.

<sup>1</sup> Ember (2025), [Global Electricity Mid-Year Insights 2025](#)

<sup>2</sup> Centre for Research on Energy and Clean Air (CREA) (2025), [Analysis: Clean energy just put China's CO2 emissions into reverse for first time](#)

<sup>3</sup> All data in the briefing, unless otherwise referenced, is from Global Energy Monitor (GEM), [Global Coal Plant Tracker](#) – July 2025 release. When analysing changes in prospective capacity since the Paris Agreement was signed, January 2016 data is used as the starting point. This is referred to as “since 2015” or “in the last decade”.

## Headline messages

- ▶ **No New Coal is now a global norm for the vast majority of countries and is a critical marker of progress in the global transition away from fossil fuels.** 164 countries – covering more than two-thirds of the global economy – either have no planned coal in their project pipeline and/or have made a No New Coal commitment.
- ▶ **A decade on from the ratification of the Paris Agreement in 2015, the global pipeline of planned coal-fired power plant projects has collapsed by 65%, and 74% when excluding China.** The global surge in renewables deployment has made this possible, boosting energy security and shielding economies from dependency on volatile international fuel markets.
- ▶ **Approximately 4 billion tonnes of CO<sub>2</sub> emissions have been avoided every year of the last decade thanks to the collapse of planned coal capacity** – equivalent to nearly one-third of China's annual CO<sub>2</sub> emissions. Outcompeted almost everywhere by cheaper, cleaner new renewable energy, since 2015 more prospective coal plants have been cancelled than have become operational. 91% of new renewable projects commissioned in 2024 were cheaper than any fossil fuel alternative.<sup>4</sup> This trend is set to continue as the costs of wind, solar and battery plummet at record-breaking rates.<sup>5</sup>
- ▶ **Solar and wind dominate installed capacity expansion globally** and capacity additions are exceeding coal and gas in nearly all countries with planned coal projects. In 2024, they accounted for 87% of new capacity additions, while coal made up just 3% – showing the world has reached a structural shift in global energy investments.
- ▶ **Momentum on No New Coal continued in 2025 NDCs:**<sup>6</sup> **Australia, Cambodia, Canada, Mauritius, Morocco, Singapore and the UK** reiterated or made commitments to no new coal. Also, this year, **Thailand** cancelled its last planned coal plant and is now free of planned coal. **Honduras** likewise committed to stop permitting new coal plants and to phase out unabated coal from its electricity system through new membership of the Powering Past Coal Alliance (PPCA). **There is now no actively planned coal on the entire continent of Latin America.** Outside of China, more than four times as much capacity was cancelled in the first half of 2025 than started construction.
- ▶ **The number of countries with new coal power under development is at a record low.**<sup>7</sup> This total of 29 countries is down from 65 a decade ago. In almost all of the countries still planning coal power, solar and wind capacity additions are exceeding coal

<sup>4</sup> IRENA (2025), [Renewable power generation costs in 2024](#)

<sup>5</sup> Bloomberg NEF (2025), [Levelized Cost of Electricity Report 2024](#)

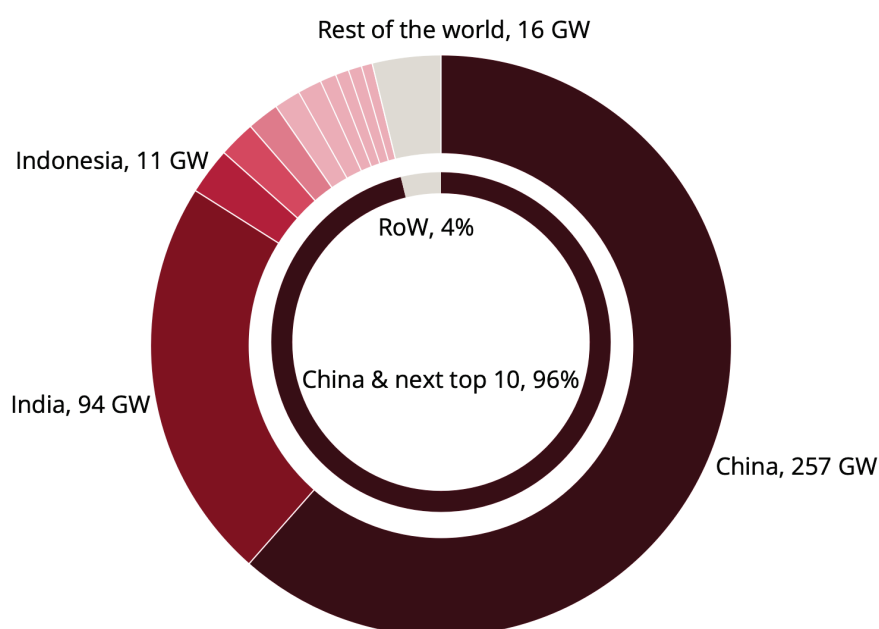
<sup>6</sup> E3G (2025), [NDC Energy Commitments Tracker](#)

<sup>7</sup> GEM, [Global Coal Plant Tracker](#) – October 2025 release

and gas. New proposals totalled less than 2 GW in the third quarter of 2025 – 85% below the over 12 GW quarterly average proposed the past two years.<sup>8</sup>

- **Just 11 countries now account for 96% of new planned coal power:** China, India, Indonesia, Zimbabwe, Russia, Kazakhstan, Bangladesh, Laos, Mongolia, the Philippines and Pakistan (Figure 2). The remaining 4% is spread across 18 countries, of which eight have only a single project and are very close to achieving No New Coal.
- **China remains a global outlier: responsible for 62% of the world's planned coal capacity, China is isolated in the scale of its pursuit of new coal.** The country's planned coal is dwarfed only by its planned renewables. The world leader in the rollout of both wind and solar, China has an unparalleled 1,215 GW of prospective capacity for these clean energy sources and has committed to increase this pipeline to over 3,600 GW by 2035.<sup>9</sup> There is no need for new coal: in the first half of 2025, generation from clean energy exceeded domestic demand growth.<sup>10</sup> Going beyond its insufficient NDC, China now has a clear opportunity to implement plans to end new coal construction in its next Five Year Plan in 2026.

## Remaining planned coal power is highly concentrated



**Source:** E3G analysis of Global Energy Monitor (GEM) Global Coal Plant Tracker – October 2025 release.

**Figure 2:** Just 11 countries account for 96% of new coal proposals: China, India, Indonesia, Zimbabwe, Russia, Kazakhstan, Bangladesh, Laos, Mongolia, the Philippines and Pakistan.

<sup>8</sup> GEM, [Global Coal Plant Tracker](#) – October 2025 release

<sup>9</sup> Xi Jinping, (24 September 2025), [Xi Jinping's speech at the UN Climate Change Summit \(full text\)](#).

<sup>10</sup> CREA (2025), [Analysis: Clean energy just put China's CO2 emissions into reverse for first time](#), Centre for Research on Energy and Clean Air (CREA).

## OECD/EU: No New Coal is an energy transition norm in wealthy countries

- ▶ **Proposals for new coal power capacity among countries in the OECD and EU have collapsed by 97% since the adoption of the Paris Agreement in 2015.** No new coal projects have entered construction anywhere in the OECD since the end of 2019.
- ▶ **With No New Coal an established norm in the OECD, the world's wealthiest countries are now looking to phase out coal entirely.** OECD coal generation peaked in 2007, and has more than halved since then.<sup>11</sup> 78% of coal capacity in the OECD and EU has either retired since 2010 or is expected to be retired by 2030, aligned with the Paris Agreement objectives. Rapid growth in solar and wind was responsible for 87% of the fall in coal during this period.
- ▶ **Japan, Türkiye, the US and Australia** are the only OECD countries that, at least on paper, are planning new coal. Most of these projects are unlikely to move into construction due to ongoing delays and financial and economic challenges.
- ▶ At COP28, then-President Kishida announced that **Japan** would “end new construction of domestic unabated coal power”, reaffirming a G7 commitment made earlier in the year. However, Japan still has one coal plant in the planning stage – the GENESIS Matsushima project – which is awaiting permit. The government appears to regard the project as abated, citing planned efficiency and co-firing measures. To retain credibility on its G7 commitment, the newly elected Japanese government must decline the permit or ensure the project developers plan for full abatement in line with the IPCC standard.<sup>12</sup>
- ▶ **Türkiye** has only one remaining planned coal project that is unlikely to proceed (see box on page 6). Formalising its de facto halt on new coal projects would be low-hanging fruit to boost Türkiye’s clean energy transition credibility as part of its COP31 Presidency bid.
- ▶ **The United States** has no unabated coal projects in its pipeline, but three new speculative coal-fired power plants with carbon capture, utilisation and storage (CCUS) proposed. Notably, given the very high costs and significant planning needs, only five operational CCUS projects on coal plants have ever been built.<sup>13</sup> The poor economics of

<sup>11</sup> Ember (2024), [Coal generation in OECD countries falls below half of its peak](#)

<sup>12</sup> IPCC (2022), [Summary for Policymakers Headline Statements](#). The IPCC defines “unabated fossil fuels” as “fossil fuels produced and used without interventions that substantially reduce the amount of GHG emitted throughout the life-cycle; for example, capturing 90% or more from power plants.” For an explainer, see E3G (2024), [Explained: what does ‘unabated coal’ mean?](#)

<sup>13</sup> International Energy Agency (IEA) (2022), [Coal in Net Zero Transitions](#), p. 40

coal compared to new renewables in the US make it highly unlikely that these plants will move into construction. No new coal plant has begun operating in the US since 2015.<sup>14</sup>

- **Australia** committed to end the construction of new coal by joining the PPCA's Call to Action for No New Coal, launched at COP29, and reiterated in Australia's NDC. One last plant in the pipeline is stalled and has not yet received a permit (see box on page 7). Cementing an ambitious coal phase-out date would signal intent towards clean energy leadership as part of a potential COP31 Pacific and Australian Presidency.

### ► **Türkiye: From major coal pipeline to one plant left**

Planned coal capacity in Türkiye has **collapsed by 99% over the last decade**. The country leads in the OECD/EU in terms of cancelled coal capacity.

Türkiye recently revoked the licenses for two pre-construction projects, leaving only one project – the Afsin Elbistan A (688 MW) – in the country's pipeline. The plant faces economic barriers and is unlikely to proceed.

Türkiye further has an ambitious roadmap to achieve 120 GW of solar and wind capacity by 2035, a fourfold increase from its current installed capacity. While there are indications that this ambition may be recalibrated closer to the earlier 82 GW target, such an expansion would still mark a major step. **Committing to firmly end new coal construction is the lowest-hanging fruit for Türkiye to bolster this signal and build investor confidence.**

However, coal remains politically protected despite weak economic rationale. Recently announced new coal subsidies, pledging to buy most electricity from domestic coal plants at fixed rates until 2030 and extending similar guarantees for any new coal units through 2045, risks sustaining new coal plant proposals.

With Türkiye signalling interest in stepping up its climate leadership and hosting the COP31 Presidency, the country can build its credibility by committing to No New Coal. With an NDC pledge that would still result in a 16% increase in its absolute emissions over the same period, ending new coal power – and committing to a phase-out date – would also show Türkiye going beyond its NDC in a signal of increased ambition.

<sup>14</sup> GEM (2025), [New Coal-fired Power Capacity in the United States by Year \(MW\)](#), Global Coal Plant Tracker, Global Energy Monitor (GEM), July 2025 release.

## ► **Australia: Clean energy superpower ambitions drive shift from coal power**

**Australia has committed to No New Coal** through its membership of the PPCA's Call to Action for No New Coal, launched at COP29 in 2024<sup>15</sup>. The government has reflected the decision to no longer permit new coal-fired power stations in its latest NDC.<sup>16</sup> This follows the **collapse of the planned coal pipeline by three-quarters since 2015**.

New coal has been outcompeted by cheaper renewable energy as Australia progresses its vision to become a renewables superpower. Wind and solar are the cheapest forms of newly built electricity in Australia,<sup>17</sup> including costs associated with additional storage and transmission, and will deliver affordable, reliable power. Costs associated with solar and batteries are still falling.

The end of new coal power and major planned pipeline of 372 GW of solar and wind are also powering the phase-out of existing coal power capacity in Australia. Coal phase-out is feasible in the 2030s, according to modelling from the Australian Energy Market Operator (AEMO).<sup>18</sup> Cementing an ambitious phase-out date and exiting coal even faster would signal intent towards clean energy leadership as part of a potential COP31 Pacific and Australian Presidency.

## **Non-OECD (outside China): No New Coal within sight**

- **The number of planned coal projects in non-OECD countries (excluding China) has largely levelled off**, with many shifting investments towards renewables. A few countries, e.g., India, Indonesia, and Zimbabwe, continue to expand their coal pipelines.
- Of the 24 non-OECD countries with proposed coal projects (excluding China), five only have one planned plant: Afghanistan, Eswatini, Kyrgyzstan, Madagascar, and Niger.
- **Most recently, Cambodia, Mauritius, Morocco, Singapore and Thailand** have all committed to No New Coal in their NDCs or cancelled their last plant and so are now coal free - showing that momentum continues outside the OECD.

<sup>15</sup> PPCA (2024), [25 Countries and the EU launch Call to Action for No New Coal in National Climate Plans](#).

<sup>16</sup> Commonwealth of Australia (2025), [Australia's 2035 Nationally Determined Contribution](#).

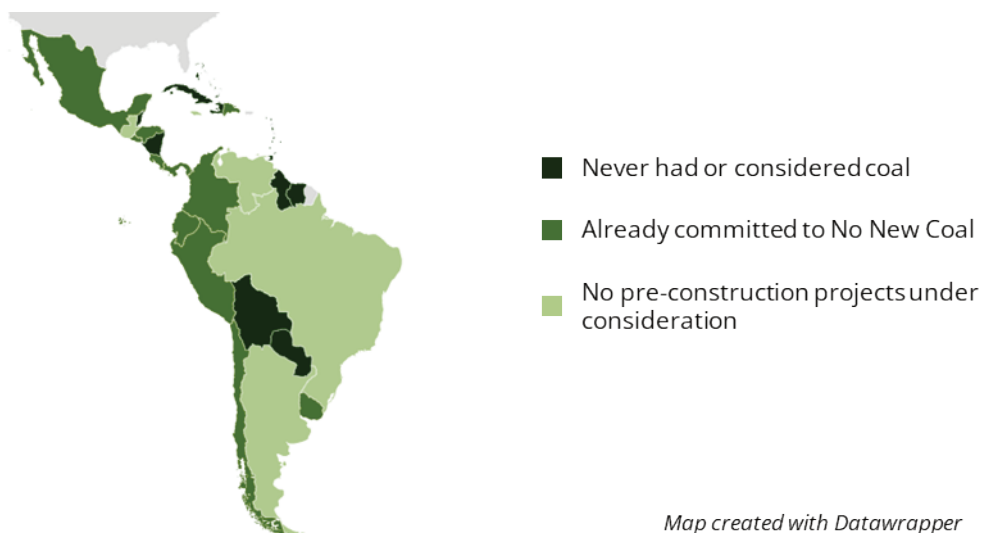
<sup>17</sup> CSIRO (2025), [GenCost 2024-25: Final report](#)

<sup>18</sup> Australian Energy Market Operator (AEMO) (2024), [2024 Integrated System Plan \(ISP\)](#)

## Latin America and the Caribbean: Free of active coal power expansion plans

- ▶ **Latin America and the Caribbean is free of coal expansion projects**, with no actively planned coal-fired power plants (Figure 3). The last plant on the continent was de facto cancelled in May 2025 when **Honduras joined the PPCA** and the government affirmed the country's commitment to not build any new coal power plants.
- ▶ Ahead of COP29, 21 Latin American countries joined the Latin American Energy Organization (OLADE)'s No New Coal-Fired Power Plants commitment.<sup>19</sup> 33 countries in Latin America and the Caribbean have either formally committed to No New Coal or never considered coal power.
- ▶ **Brazil, this year's COP30 President, is not actively planning new coal power**, but has not yet officially cancelled its last remaining plant. The Pedras Altas/Ouro Negro power station has seen no progress on licensing in two years and is unlikely to be built due to limited financing for coal projects and increased competition from cheaper energy sources, such as solar. **In the context of Brazil's COP30 Presidency and the urgent task of addressing the expected NDC emissions gap, formally committing to No New Coal** would reflect the reality of the country's energy plans, reaffirm the norm of No New Coal in Latin America, and send a clear signal that moving beyond coal is a key action to implementing and exceeding NDCs.

### Coal planning status in Latin America



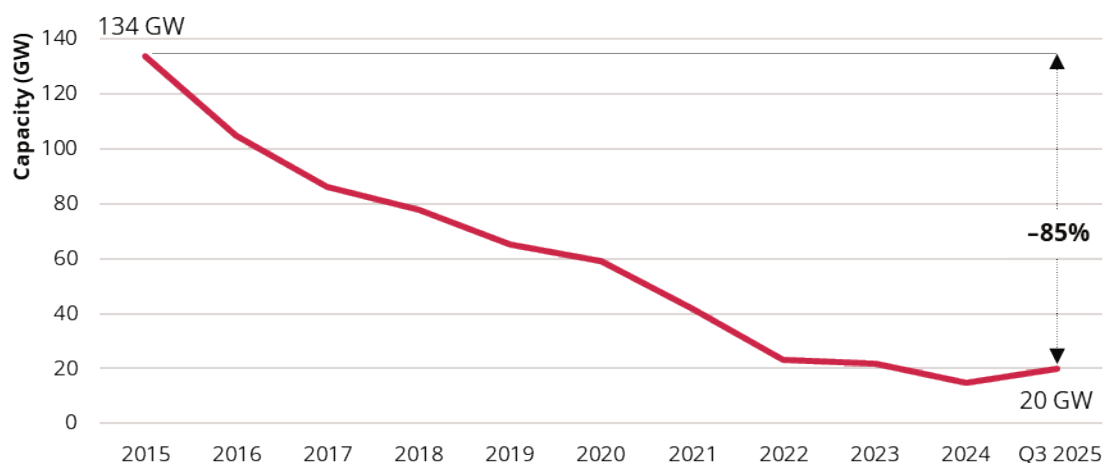
**Figure 3:** No country in Latin America and the Caribbean is actively planning new coal power.

<sup>19</sup> Organización Latinoamericana de Energía (OLADE) (2024), [OLADE and its Energy-Climate Agenda at COP29, Baku, Azerbaijan](#)

## Southeast Asia: the last decade has seen an 85% collapse in coal

- **Southeast Asia's coal pipeline has shrunk 85% since 2015** (Figure 4), collapsing to 19 GW today, from 134 GW in 2015. Southeast Asia has now shifted from a state of coal expansion to one of tension between the technological and financial drivers of an accelerated shift away from new coal power, including cheaper renewables technology and increasingly limited international coal finance, and entrenched domestic political interests.<sup>20</sup> Support for accelerated renewables deployment to meet the region's growing energy demand and boost energy security, alongside the success of coal retirement pilots to build confidence in the coal-to-clean transition, are key routes to firmly moving beyond the final few new coal power proposals.
- **Thailand** cancelled its last remaining coal power project this year, an expansion of the massive 2.4 GW Mae Moh coal plant, making the country free of coal expansion plans.
- **Cambodia** committed to not permit any new coal power plants in its most recent NDC, submitted in August 2025, representing a key leadership position in the region.
- **Indonesia remains a major coal power developer** in Southeast Asia. Its 10.9 GW coal power pipeline is the third largest globally, behind China and India. This is in large part due to national development plans where domestic raw mineral processing – powered by 8.1 GW of “captive” or on-site coal power units – is central (see box on page 10).

### Decline in planned coal capacity in Southeast Asia



**Source:** E3G analysis of Global Energy Monitor (GEM) Global Coal Plant Tracker – October 2025 release.

**Figure 4:** Planned coal capacity in Southeast Asia has shrunk by 85% since the Paris Agreement.

<sup>20</sup> E3G (2021), [No New Coal: South-east Asia Overview](#)

- **The Philippines** declared a moratorium on building new coal power plants that had not already been permitted in 2020. The country's pipeline has dropped from 10.1 GW of planned coal in 2015 to 2.6 GW as of October 2025.<sup>21</sup> However, the existing coal moratorium includes several exemptions, with a recent set of clarifications in October 2025 risking opening the door to new coal power expansion.<sup>22</sup> As ASEAN Chair in 2026, the Philippines has a key opportunity for energy transition leadership by signalling a firmer intent to move away from new coal, and working with partners to accelerate regional renewables deployment.
- **Viet Nam is sending mixed signals on new coal power vs. renewables growth.** In 2025, Viet Nam's utility EVN announced a potential revival of the 1.2 GW Quảng Trị-1 power plant.<sup>23</sup> This, and the one other proposed coal plant in Viet Nam's pipeline (the 0.65 GW An Khanh – Bac Giang power station)<sup>24</sup>, are at odds with the country having increased its 2030 solar energy target to 46 GW in its spring 2025 Power Development Plan (PDP8) refresh, a 3.5-fold increase on previous targets.<sup>25</sup> The plan refers to renewables as the “workhorse” of wider national aims for economic growth: underpinning 10% and 7.6% of GDP growth targets in 2030 and 2050 respectively. Reviving a previously shelved plan for new coal sends a contradictory signal to investors and should be reassessed.

### ► **Indonesia: building a renewables vision requires clarity on coal**

In 2022, Indonesia committed to stop developing new coal power plants beyond those already listed in the 2021–2030 electricity supply business plan (RUPTL).<sup>26</sup> New projects may however still be allowed under strict conditions,<sup>27</sup> particularly tied to industrial use and emissions controls.

President Prabowo's announcements to close Indonesia's coal fleet within 15 years (at the 2024 G20 Summit),<sup>28</sup> achieve 100% renewable energy by 2035 (2025 BRICS Summit),<sup>29</sup> and install 100 GW of solar power, with most capacity distributed across

<sup>21</sup> GEM (2025), [Integrated Power Tracker](#)

<sup>22</sup> Centre for Ecology and Economic Development (2025), [Think-tank warns vs DOE's widening of coal moratorium exemptions](#)

<sup>23</sup> *The Investor* (2025), [EVN seeks to invest in 1,320 MW abolished coal-fired power project in central Vietnam](#)

<sup>24</sup> GEM Wiki, [An Khanh - Bac Giang power station](#), accessed 23 October 2025.

<sup>25</sup> Vietnam Briefing (2025), [Vietnam Revises PDP8: Key Targets of the National Power Development Plan](#); AO Shearman (2025), [Vietnam's PDP8 gets a makeover](#)

<sup>26</sup> Makarim & Taira S (2022), [The Implementation of the Presidential Regulation on Renewable Energy: The Beginning of the Transition from Coal Fired Power Plants to Renewable Energy Power Plants](#)

<sup>27</sup> Ibid.

<sup>28</sup> Cabinet Secretariat of the Republic of Indonesia (2024), [G20 Summit: President Prabowo Subianto Highlights Indonesia's Green Energy Vision, Global Climate Role](#)

<sup>29</sup> Bloomberg (2025), [Prabowo Says Indonesia Can Hit 100% Renewable Energy by 2035](#)

villages, further underscore the vision for Indonesia's clean energy transition. Achieving these aims will require a **clear signal that only new renewables capacity is going to be prioritised and deployed going forward.**

However, despite political signals, Indonesia still plans a buildout of 10.9 GW of additional coal capacity, 8.1 GW of which is “captive” capacity, or off-grid power for industrial facilities.<sup>30</sup> 1.2 GW of the new on-grid capacity is “hybrid coal”, meaning it will be integrated with solar and storage systems.

Plans for new coal capacity are driven by projected baseload demand (high voltage customers) in emerging industrial zones and data centres in Sumatra and Kalimantan around 2032. An **alternative to these proposals is a vision rooted in renewable baseload and storage** – increasingly cost-competitive in the region – supported by accelerated investment, demand-side management and timely grid upgrades. A firm No New Coal commitment would be a major plank on which to build investor confidence in these transitions, and to bolster ongoing coal retirement pilots. Domestic business sentiment is already supportive: in a global survey, all executives polled in Indonesia supported a phase-out of coal in the energy system, 88% of whom want this to happen by 2035 or earlier.<sup>31</sup>

## South Asia: in a region moving away from new coal projects, holdouts face major stranding risks

- **South Asia's pipeline has shrunk by 65% in the last decade**, as countries have increasingly turned away from the stranding risk of new coal and pursued renewables deployment. However, the region continues to account for the bulk of planned coal power projects outside China, largely due to India's significant pipeline.
- **India's current energy development combines year-on-year record-breaking renewables development with the world's second-largest coal pipeline after China.** India registered a record high solar capacity addition of 24.5 GW in 2024, nearly 2.5 times the total installed the year before.<sup>32</sup> Wind capacity additions are increasing too: the 3.4 GW added in 2024 marked a seven-year high.<sup>33</sup> India has a domestic target

<sup>30</sup> Sources conflict on the total planned coal capacity expansion in Indonesia. State utility PLN's new electricity plan (“RUPTL”) released this year and the country's Just Energy Transition Partnership (JETP) Secretariat identify projected additions that differ from those tracked by Global Energy Monitor: they identify 14.9 GW in total, comprised of 6.3 GW of on-grid capacity and 8.6 GW of “captive”. For consistency, we cite the GEM figures. For more detail on the new RUPTL, see *The Jakarta Post* (2025), [RI launches new RUPTL, hoping to add 6.3 GW of coal power in next decade](#)

<sup>31</sup> E3G, Beyond Fossil Fuels, We Mean Business Coalition, Savanta (2025), [Powering Up: Business Perspectives on Shifting to Renewable Energy](#).

<sup>32</sup> Enerdata (2025) [India achieves 218 GW of non-fossil fuel based capacity in 2024](#)

<sup>33</sup> Bloomberg, (2025) [India Wind Energy on the Rise to Aid Night-Time Clean Power Need](#)

of 450 GW of renewables by 2030, with a vision of reaching 1,800 GW of non-fossil capacity by 2047 – indicating a trajectory towards a predominantly decarbonised power sector.<sup>34</sup> These figures represent India's rapid ascendance as a global clean energy leader, with the potential to meet energy demand growth with clean power.

- ▶ **Despite its leadership on renewable energy, India also sees coal expansion as critical** in meeting its energy needs and development aspirations and has a large pipeline of 81.4 GW in planned coal power. However, the growth rate of thermal power additions since 2016 has slowed significantly (2% through to 2024) compared to average 12% growth rate between 2010–16.<sup>35</sup> India's current pipeline has drastically reduced by up to 66% compared to 2015, when 241 GW of coal power was planned. This emphasises that pipelines do not always materialise into real-world projects; 81% of the planned capacity in 2015 was cancelled by 2024, and only 5% (12 GW) became operational.<sup>36</sup> The slowing growth rate and increase in cancellations risks a large pipeline of stranded projects.
- ▶ **Bangladesh's pipeline is in a state of flux.** The country's recent increase in ambition to generate 30% of power from renewables by 2040,<sup>37</sup> stands in contrast to policy announcements on coal. While the prior government cancelled 10 coal plant proposals in 2021, the current government is reportedly considering reviving one of the most controversial projects, a major 1.2 GW plant in Matarbari.<sup>38</sup> In total, 5.55 GW of coal power capacity is announced, pre-permitted or permitted in Bangladesh. Like Pakistan, Bangladesh's coal power development has been driven in large part by Chinese investments; a surge in proposals after 2015 preceded a drop after China's pledge in 2019 not to finance coal power overseas.
- ▶ **Pakistan's booming, small-scale solar power capacity is fundamentally reorienting its power system** (see Box on page 12). Three major plants account for its 1.95 GW pipeline, which represents almost a 75% decrease on its 7.3 GW pipeline in 2020.
- ▶ **Sri Lanka publicly pledged No New Coal in its 2021 NDC**, making it a coal phase-out leader in the region. It has just one operating coal plant, the 0.9 GW Lakvijaya power plant in Norochcholai.

<sup>34</sup> Lack of clarity regarding whether this number is non-fossil energy or specifically renewables. See Press Information Bureau (2025), [India Targets Swadeshi Solar Cells by 2028: Moving Towards Indigenous Wafers and Ingots: Union Minister Pralhad Joshi](#)

<sup>35</sup> Indian Government (2025), [National Power Portal](#)

<sup>36</sup> World Resources Institute (2024), [Lessons From the Coal Boom That Didn't Happen](#)

<sup>37</sup> Institute for Energy Economics and Financial Analysis (IEEFA) (2025), [Bangladesh's Energy Policy changes raise more questions than they answer](#)

<sup>38</sup> The Business Standard (2025), [Govt revives cancelled Matarbari, 1,200MW coal-fired power plant](#)

## ► Pakistan: Riding a solar wave

In December 2020, former Prime Minister Imran Khan announced that Pakistan would “not have any more power based on coal”. However, Pakistan’s most recent NDC, published this year, only refers to the investment costs of “coal phase-down and replacement with solar”, without a clear timeline and commitment.

At the time of the 2020 announcement, Pakistan had 4.2 GW of planned coal power.<sup>39</sup> This pipeline has halved in the interim, to just 1.95 GW today, made up of three plants.<sup>40</sup> Two have not yet received permits (the 1320 MW Thar Block VI and 330 MW Thar K-Electric) and one is permitted (the 300 MW Gwadar plant).

Coal power contracts have become increasingly unsustainable in Pakistan, due to its circular debt crisis where failure to meet debt obligations has made future debt servicing more costly. This has threatened the coal power sector and dramatically hiked grid power tariffs in the last decade. Around two-thirds of Pakistan’s coal is imported each year, further exposing it to volatile international coal markets.<sup>41</sup>

At the same time, **Pakistan is seeing a boom in off-grid solar capacity**, having rapidly grown to the world’s sixth-largest solar market.<sup>42</sup> Pakistan imported 25 GW of solar panels from China in just the last three years, increasing its power capacity by half. Alongside the country’s grid-scale non-fossil energy pipeline of 11 GW, the solar additions dwarf the 2 GW of coal power in development.<sup>43</sup> This solar boom – itself propelled by unaffordable tariffs resulting from costly thermal coal and gas assets, and the declining cost of renewables – **presents a clear opportunity and support for Pakistan’s to end plans for new coal power.**<sup>44</sup>

<sup>39</sup> E3G (2021), [No New Coal by 2021](#): The Collapse of the Global Coal Pipeline

<sup>40</sup> Government of Pakistan (2025), [Pakistan NDC 3.0](#)

<sup>41</sup> Malik, A. (2023). [Local coal for power generation in Pakistan](#), *The Pakistan Development Review*, 62:4.

<sup>42</sup> Renewables First and Herald Analytics (2024), [The Great Solar Rush in Pakistan](#)

<sup>43</sup> GEM (2025), [Integrated Power Tracker](#)

<sup>44</sup> Renewables First and Herald Analytics (2024), [The Great Solar Rush in Pakistan](#)

## Africa: major renewables potential and limited plans for new coal

- ▶ **Africa's vast renewables potential (11 TW of solar capacity alone)<sup>45</sup> can meet the continent's growing energy demand, but is yet to be realised.** Energy access remains the most pressing challenge for Africa: 600 million people lack access to electricity<sup>46</sup> and 1.2 billion to clean cooking.<sup>47</sup> A target to deploy 300 GW of renewable energy by 2030 was agreed at the 2023 Africa Climate Summit<sup>48</sup>, standing in start contrast to the only 4.2 GW of renewable capacity deployed across all of Africa in 2024.<sup>49</sup> In the Addis Ababa Declaration agreed this year,<sup>50</sup> African leaders called for the continent's share of global renewable energy investments to rise from just 2% today to at least 20% by 2030, a shift that would support Africa's potential as a renewable energy powerhouse.
- ▶ **Most African countries are not planning new coal power.** Only 11 of the 54 countries on the continent have a coal pipeline.<sup>51</sup> New coal power plants are more expensive than new clean technologies, crowd out clean energy investments by using scarce financial resources in markets where capital is limited, use vast water resources and face opposition from local communities and civil society organisations.
- ▶ **Of the 11 African countries planning coal, three have just one planned coal plant: Eswatini, Madagascar and Niger.** In Madagascar, the project has been stalled for years and is highly unlikely to proceed. These countries can signal their intent to prioritise clean energy by showing they will not build more coal, provided they receive adequate financial support to realise their abundant renewables potential and fulfil the conditional commitments in their NDCs.
- ▶ **South Africa is a strong candidate for a No New Coal commitment,** as it only has one proposed coal plant that cannot legally proceed. The High Court issued a landmark judgment in the "Cancel Coal" case in December 2024,<sup>52</sup> ruling that the national government's plans to procure 1.5 GW of power from a newly proposed coal-fired power plant (the only one in the country's pipeline) failed to comply with its constitutional and statutory obligations to protect the rights of present and future

<sup>45</sup> African Development Bank (AfDB) (2024), [The African Development Bank's Desert to Power Initiative](#)

<sup>46</sup> United Nations Sustainable Development Group (UNSDG) (2025), [Decoding Africa's Energy Journey: Three Key Numbers](#)

<sup>47</sup> AfDB (2024), [COP29: Lack of Clean Cooking Access Poses Deadly Risks for Millions in Africa. Leaders Urge Action](#)

<sup>48</sup> African Union (AU) (2023), [The African Leaders' Nairobi Declaration on Climate Change and Call to Action](#)

<sup>49</sup> IRENA (2025), [Renewable Capacity Statistics 2025](#)

<sup>50</sup> AU (2025), [Addis Ababa Declaration on Media, Climate, Peace, Security and Justice](#)

<sup>51</sup> Botswana, Eswatini, Madagascar, Malawi, Mozambique, Niger, Nigeria, South Africa, Tanzania, Zambia, Zimbabwe

<sup>52</sup> Oxford Human Rights Hub (OHRH) (2024), [#CancelCoal: South African Youth Successfully Lead Climate Case Against Proposed Coal-Fired Power Station](#)

generations. With significant wind and solar potential,<sup>53</sup> a sizeable clean energy pipeline following new independent power producers entering the market, and modelling for South Africa's IRP 2024 already excluding new coal capacity, there is no need for new coal to meet the country's energy demands.

- **Some African countries are keeping coal as an option for meeting energy demand while also signalling interest in renewable energy** – a clear warning that more assistance is needed to meet the No New Coal milestone. Zimbabwe, for example, has the largest planned coal pipeline in Africa and the fourth largest globally. The country proposed 1.2 GW of capacity in the first half of 2025 alone (both captive and grid-connected). However, of the total 8.55 GW proposed capacity, only 1.6 GW is permitted. Zimbabwe currently only meets around half of its 2 GW electricity demand<sup>54</sup> and experiences frequent, extended power cuts due to diminishing capacity at its ageing power plants. Droughts limit the reliability of its energy system, which is dependent on water-intensive coal and hydropower. Delivering on its 4 GW of planned solar capacity would help meet the country's growing energy demand while boosting energy security.

## Central Asia: Kazakhstan and Mongolia dominate the planned coal pipeline, while the rest of the region moves towards No New Coal

- **Most countries in this coal-dependent region are moving closer to No New Coal.** Tajikistan and Uzbekistan have no active plans for new coal power, and the one prospective coal-fired power plant in Kyrgyzstan is struggling to access financing.
- **Kazakhstan and Mongolia dominate the region's planned coal pipeline**, with respectively almost 6 GW and 3 GW of prospective capacity. The coal pipeline for both countries is among the top 10 globally: Kazakhstan is sixth and Mongolia ninth.
- **None of Kazakhstan's prospective capacity is permitted.** The glut of new projects announced in 2023 contradicts the government's 2060 Carbon Neutrality Strategy.<sup>55</sup> Furthermore, following President Xi Jinping's 2021 pledge that China would no longer help build or finance overseas coal-fired power, several of Kazakhstan's planned Chinese-financed power stations have been cancelled. However, units 3 and 4 of the Chinese-funded Ekibastuz-2 power station remain in the planning phase.
- **Kyrgyzstan and Afghanistan each have one planned project.** The plant in Kyrgyzstan has struggled to access financing, while the Baghlan power station is Afghanistan's first ever proposed coal plant. Afghanistan has no operating coal power.

<sup>53</sup> Climate and Development Knowledge Network (CDKN) (2025), [Making renewable energy affordable: The South African Renewables Initiative](#), accessed 17 October 2025.

<sup>54</sup> Reuters (2025), [Zimbabwe agrees \\$455 million power plant refurbishment deal with Jindal](#)

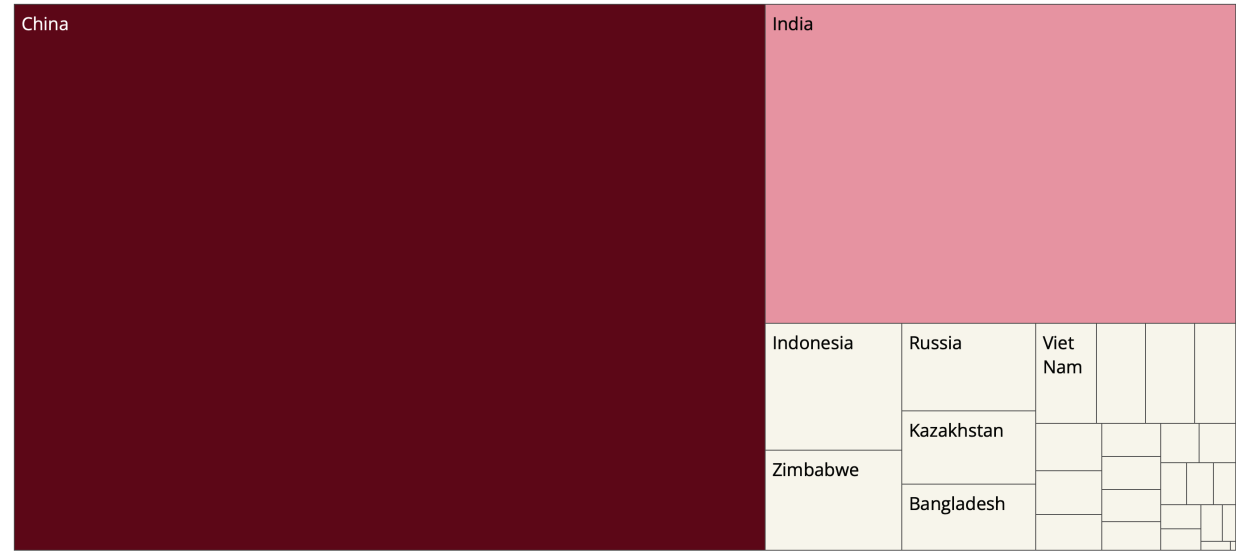
<sup>55</sup> Government of the Republic of Kazakhstan (2023), [Carbon Neutrality Strategy](#)

- **Tajikistan and Uzbekistan are both closing in on No New Coal, with zero active coal plant proposals.** The government of Tajikistan had announced plans for a coal-fired power plant in 2015, but following years without financing there has been no public update on the progress of this project since November 2023. The project is deemed shelved. Uzbekistan’s one planned coal plant, an extension of the Angren Power Station,<sup>56</sup> was not included in the parent company's 2025 business plan, indicating that it too will not progress.

## China: A global outlier on new coal construction, despite renewables leadership

- **China drives the vast majority of new coal capacity expansion,** positioning itself as a global outlier in direct opposition to the 164 countries that have no coal in their pipelines or have made a No New Coal commitment. The country accounts for 62% of global planned pre-construction coal capacity (Figure 5), with 257 GW in the pipeline, and 82% of the world’s coal plants under construction.

### Planned capacity in China vs the rest of the world



**Source:** E3G analysis of Global Energy Monitor (GEM) Global Coal Plant Tracker – October 2025 release.

**Figure 5:** China’s 257 GW planned coal capacity dominates the global coal pipeline.

<sup>56</sup> GEM Wiki (2025), [Angren Power Station](#), accessed 19 October 2025.

- ▶ **At the same time, China dominates the rollout of renewable energy technologies worldwide.** It accounts for over one-third of global prospective solar capacity (671 GW proposed),<sup>57</sup> more than one-fifth of prospective wind energy worldwide (545 GW),<sup>58</sup> and almost one-third of global clean energy investment.<sup>59</sup> Clean generation growth led by solar and wind met 84% of China's electricity demand growth in 2024.<sup>60</sup> Meanwhile, China's investment in battery storage and grids rose 69% and 22%, respectively, between mid-2024 and mid-2025.
- ▶ **In the first half of 2025, generation from clean energy exceeded demand growth in China,<sup>61</sup> cutting fossil fuel use by 2% and demonstrating there's no need for new coal.** While electricity generation figures are weather dependent and so may vary year to year, China's clean energy boom and rapid electrification are clearly putting peak coal within touching distance. Policymakers are seeking more power generation capacity to meet demand peaks, but there is no more space on the grid for both coal and renewable energy expansion. It is time for policymakers to start cutting coal capacity.
- ▶ China's 2025 NDC gave a weak positive signal by covering all emissions, but overall the level of ambition ultimately fell short of the country's economic and clean energy potential. It specifically did not set any limits to new coal construction, despite President Xi's past pledges to "strictly control" new coal power projects. As China pledged to "strive to do more", the country needs to deliver on its existing target to reduce carbon intensity by 65% by 2050 from 2005 levels. **The most concrete way to do this is by setting a target to limit new coal construction capacity in its upcoming Five-Year Plan, which will both tackle unprofitability in the clean energy sector and can bring forward any projected peak emissions date.**

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<sup>57</sup> GEM (2025), [Global Solar Power Tracker Summary Data – Feb 2025](#)

<sup>58</sup> Ibid.

<sup>59</sup> Ember (2025), [China Energy Transition Review 2025](#)

<sup>60</sup> Ibid.

<sup>61</sup> Ibid.

## ABOUT E3G

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