Deluded Down Under

Australia’s net zero scheme won’t work because it can’t work. Here are nine charts that spotlight the country’s decarbonization delusion.

JUN 15, 2025

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Australian Gothic, net zero edition. Image: Picsart

Nearly three dozen countries have legally binding targets to achieve net zero. The list has some notable countries including Russia and Ukraine. In addition, Nigeria, the European Union, Canada, and the Republic of Moldova, have all pledged to slash their carbon dioxide emissions to zero over the next two decades or so.

While all of these countries are mouthing the words about net zero, none will come anywhere close to achieving zero emissions for the simple reason that the goal can't be achieved — or, to be more specific — net zero can't be achieved unless these countries intentionally sabotage their economies, ban all hydrocarbon use, and in doing so, plunge their people into starvation and penury.

But amid all the tomfoolery about net zero, Australia's barmy plan to achieve net zero emissions by 2050 stands out for its stubborn disregard for the facts and physics of global energy. The recent re-election of Prime Minister Anthony Albanese and his Labor Party shows that plenty of Aussie voters like the idea of renewable energy. A survey released last December by the leftist Australia Institute found that 80% of the people it polled put solar and wind among their top three favored forms of energy. Alt-energy may poll well, but it's clear that Albanese's plan to slash emissions by 43% by 2030, hit net zero by 2050, and turn Australia into "a renewable energy superpower" is a mirage.

You pay peak rate even when solar drives wholesale cost to zero

POWER PRICE RIP-OFF

John Rolfe

About 450,000 SA households are being slugged with peak retail power rates even when the network is so saturated with solar power that the wholesale price is less than zero.

Australian Energy Market Commission analysis of the state's power pricing found solar brought down wholesale costs to less than zero soon after 9am, but the cheap "solar sponge" rate didn't kick in until 10am.

The peak rate applies to customers on time-of-use tariffs at both the start and end of daylight hours – including times when solar generation is so abundant "that the market is paying consumers to use energy".

A charity boss says market operators must intervene to fix the issue.

FULL REPORT PAGE 4

This is a June 9 article published by *The Advertiser* in Adelaide. The article explains that despite a surge in "free" solar energy, the grid in South Australia is being overwhelmed and that households are being charged peak rates even when wholesale prices are low or negative.

I've been in Australia (population: 27 million) for more than a week, doing speaking engagements about the country's net zero plans. Thus far, I have visited Adelaide, Perth, Brisbane, and Melbourne. (I will be speaking in Melbourne on Monday and Sydney on Wednesday.) Since I arrived, local newspapers have published at least one article per day on the country's disastrous energy policies, including articles about the soaring cost of electricity, the failing plans to use "green" hydrogen, and looming shortages of natural gas due to the premature shuttering of the country's coal plants.

Let's take a closer look at the Delusion Down Under.

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Affordability matters. Given that, let's start with prices. Aussie households have seen their energy costs rise by more than 40% over the past three years alone. The news clip below was published in the *Australian Financial Review's* weekend edition. It explains that electricity rates across Australia will continue rising as the country's electric grid is forced to accommodate more alt-energy.

AFR 14-15 June 2025
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News 3

Bill shock with double-digit electricity rises

Energy transition

Angela Macdonald-Smith

Many households in the eastern states face a sharp jump in their power bills from July 1 as retailers raise prices on some contracts well above the increases allowed to benchmark rates, just as consumption soars due to winter weather.

One NSW customer of government-owned Red Energy this week was informed their daily service tariff would surge 41 per cent and their usage tariff by 14.4 per cent, according to a letter seen by *AFR Weekend*.

A second Red Energy customer in NSW was advised of a 44 per cent jump in their daily service tariff and a 13 per cent increase in the "anytime" usage charge. At the same time, the premium they pay for sourcing 100 per cent green power will fall by 41 per cent. Red Energy, which is part of Snowy Hydro and is owned by the Commonwealth government, pointed out that the first customer's tariff was still 12 per cent below the regulated price, known as the default market offer. Snowy Hydro declined to comment.

Other retailers were also advising customers of sharp rises in their rates from the new year, although Red Energy's were the highest increases found by *AFR Weekend*.

The national energy regulator in May allowed an increase in the benchmark DMO rate of up to 9.7 per cent in 2025-26. The rate is used to set the prices of competitive contracts in the market, which are usually lower.

Most of the price increases advised so far are tracking broadly in line with the regulated price increases in Victoria and other competitive markets in eastern Australia, but on percentage terms the increases are higher because they are coming off a lower base, said Gavin Duffy, executive manager of policy and research at St Vincent de Paul Society, who tracks energy bills.

That means customers need to brace for sharper increases than they might have expected after regulators' announcements last month of increases in benchmark tariffs for the 2026 financial year. Those increases were up to 9.1 per cent in NSW, with smaller increases for South-East Queensland, South Australia and Victoria, driven mostly by rising network and retail costs.

The biggest annual increase in dollar terms was for benchmark tariffs in the Essential Energy grid region in NSW, of $280, taking the annual bill to $3211 for a customer using 4600 kilowatts. Increases are steeper for small business customers. "That will come on top of – for many households – increased consumption as well given consumption has gone up because it is winter," Duffy said.

Households with solar panels were less affected but they are being hit by feed-in tariff rates that had "fallen off a cliff", he added.

Electricity retailers in Victoria were in January given approval to virtually eliminate payments to solar households for excess power sold into the grid, reflecting the abundance of solar power during daylight hours due to the influx of rooftop solar.

Major retailer AGL Energy advised about above-average increases for NSW customers of 11.5 per cent. Tariffs will increase on average by 6.8 per cent for customers in Victoria on variable rate market contracts, by 7.5 per cent in Queensland and by 7.8 per cent in South Australia, a spokeswoman said.

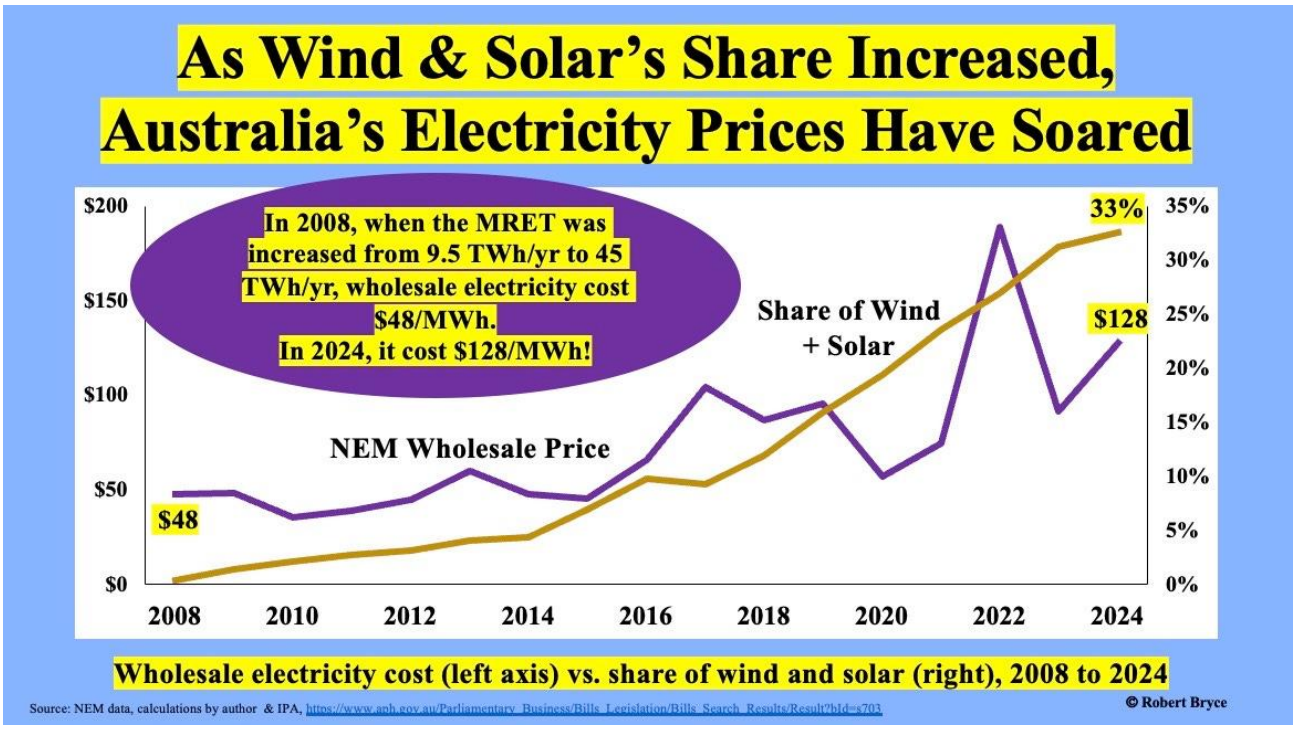
"We understood the pressure on households and businesses amidst the broader cost of living pressures facing Australians at the moment, and we carefully consider the impact on our customers," she said of the changes, which will be effective from July 1 in NSW, Queensland and South Australia, and from August 1 in Victoria.

Arch-rival Origin Energy advised of similar increases for its household customers, of 9.1 per cent on average in NSW, 3.1-3.8 per cent in Queensland, 5.5 per cent in South Australia and 10.3 per cent in the ACT. It also reported gas tariff increases of between 2.3 per cent and 5.6 per cent.

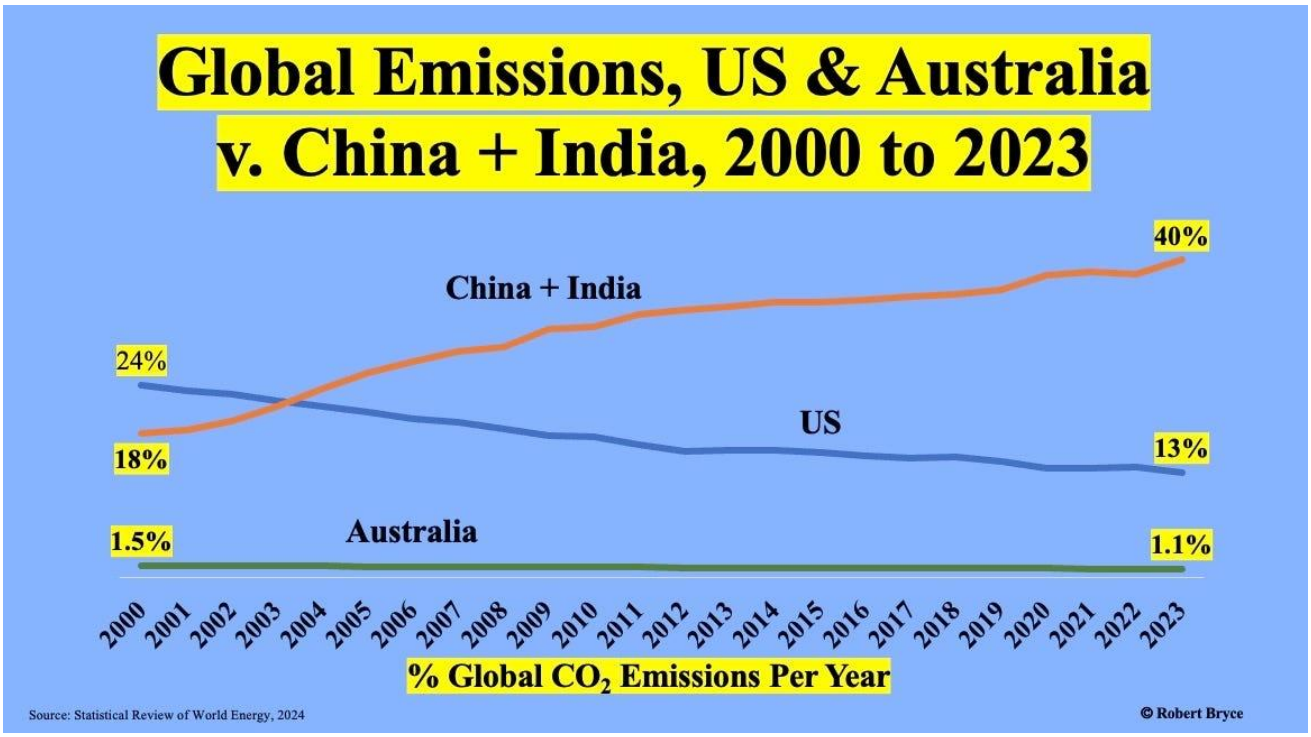
EnergyAustralia, the country's third-largest electricity and gas retailer, said it was still finalising its price changes.

▸ Queensland slams Victoria on gas pill

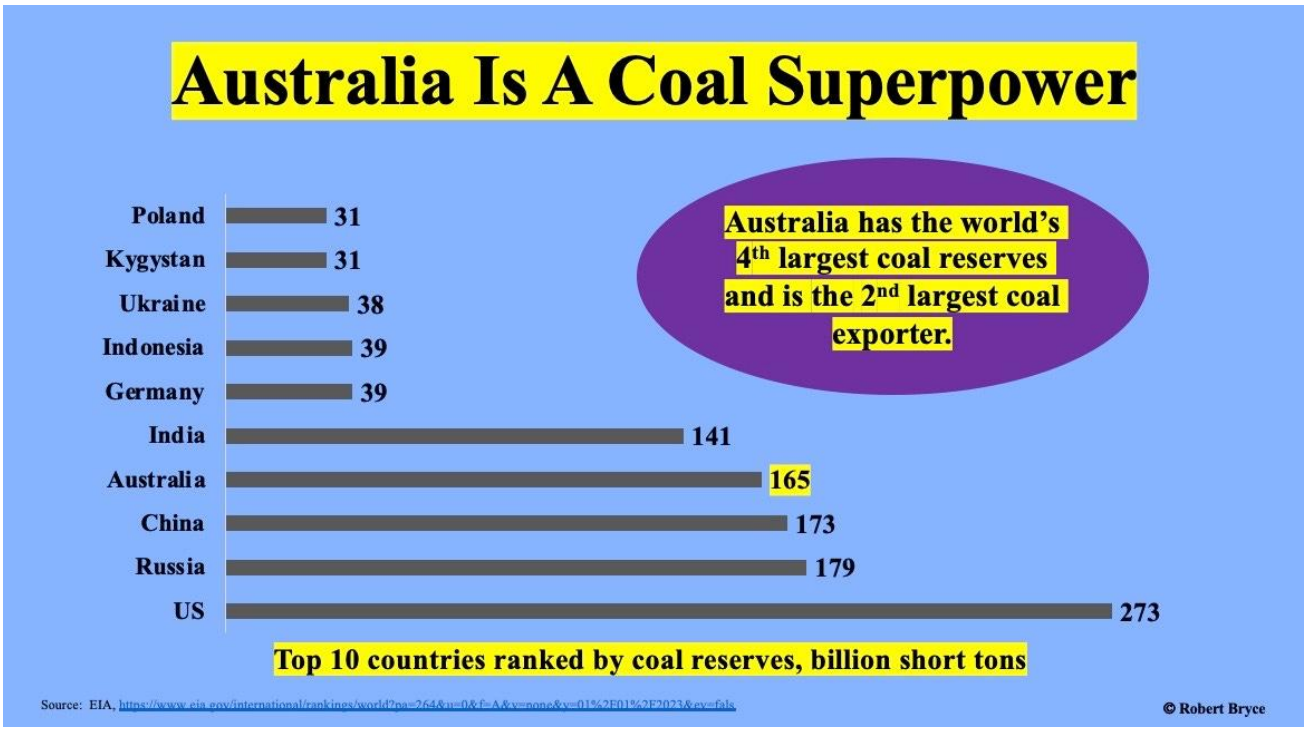
None of this is surprising. Since 2008, wind and solar have gone from zero to about 33% of the electricity produced in the National Energy Market. As seen below, wholesale prices in the NEM have jumped from $48 to $128 per megawatt-hour over that same period. Furthermore, according to data from the Australian Bureau of Statistics, the retail price of electricity in the NEM has more than doubled since 2008.



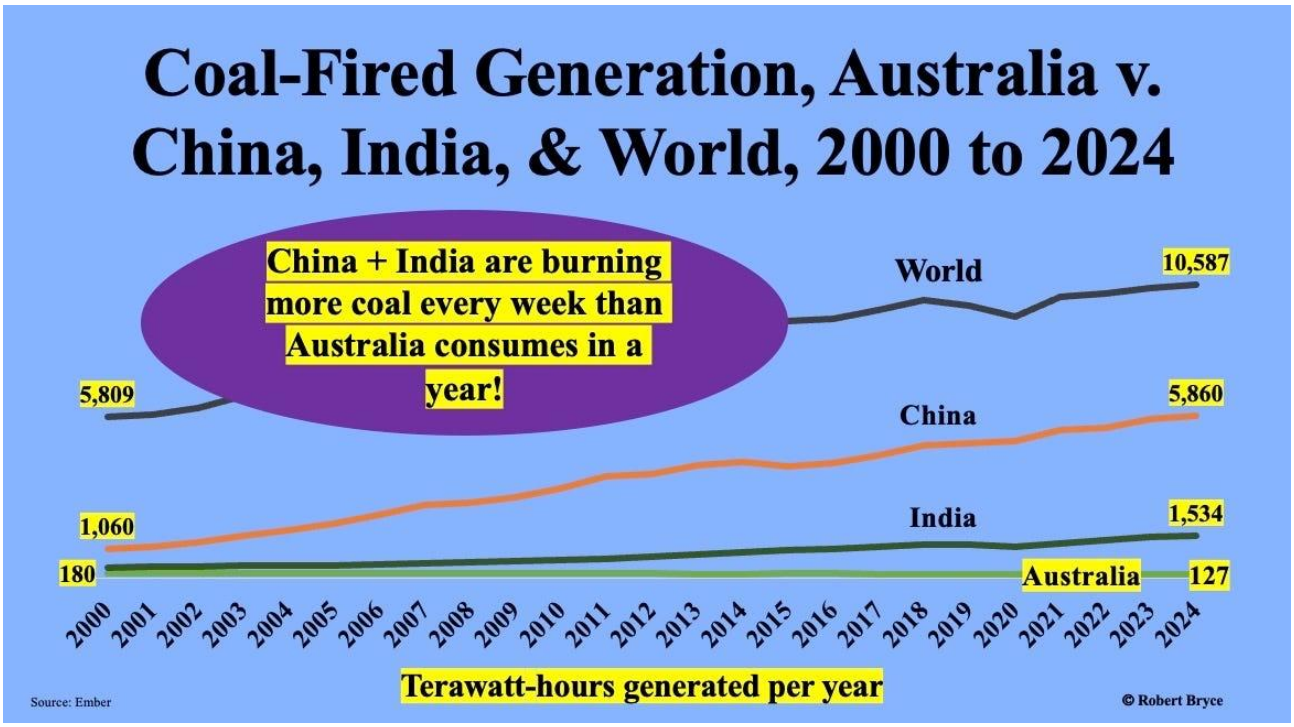
Now, let's look at Australia's share of global emissions. Between 2000 and 2023, its share of global CO2 emissions has declined from 1.5% to 1.1% of the global total. Over that same period, the combined emissions from China and India soared from 18% of the global total to 40%. And there's no doubt that their share of global emissions will continue rising as their economies grow. Thus, Australians can push for net zero all they like, but their contribution to global emissions matters less and less with each passing year.



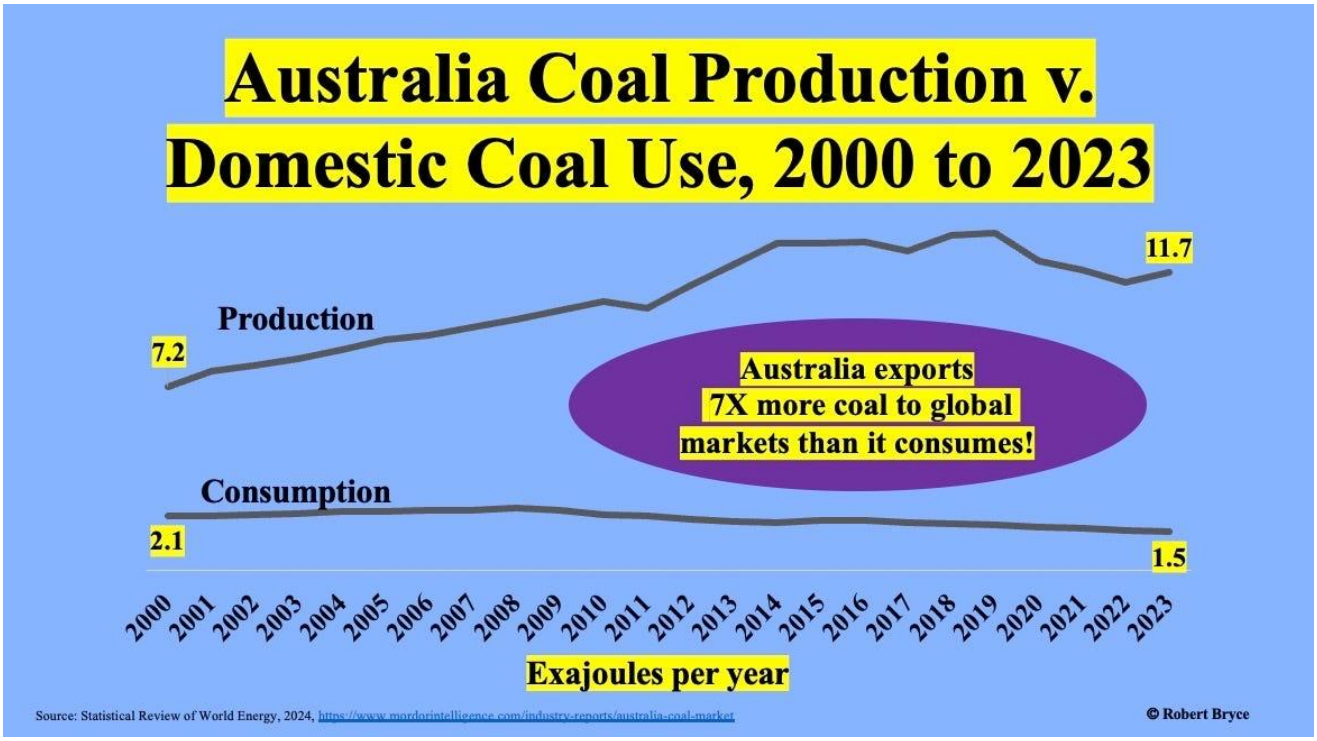
Now, let's look at coal. Australia is a coal superpower. It has some of the world's highest-quality coal, the fourth-largest coal reserves, and it is the second-biggest coal exporter. It sends coal to Taiwan, Japan, India, China, South Korea, and other countries.



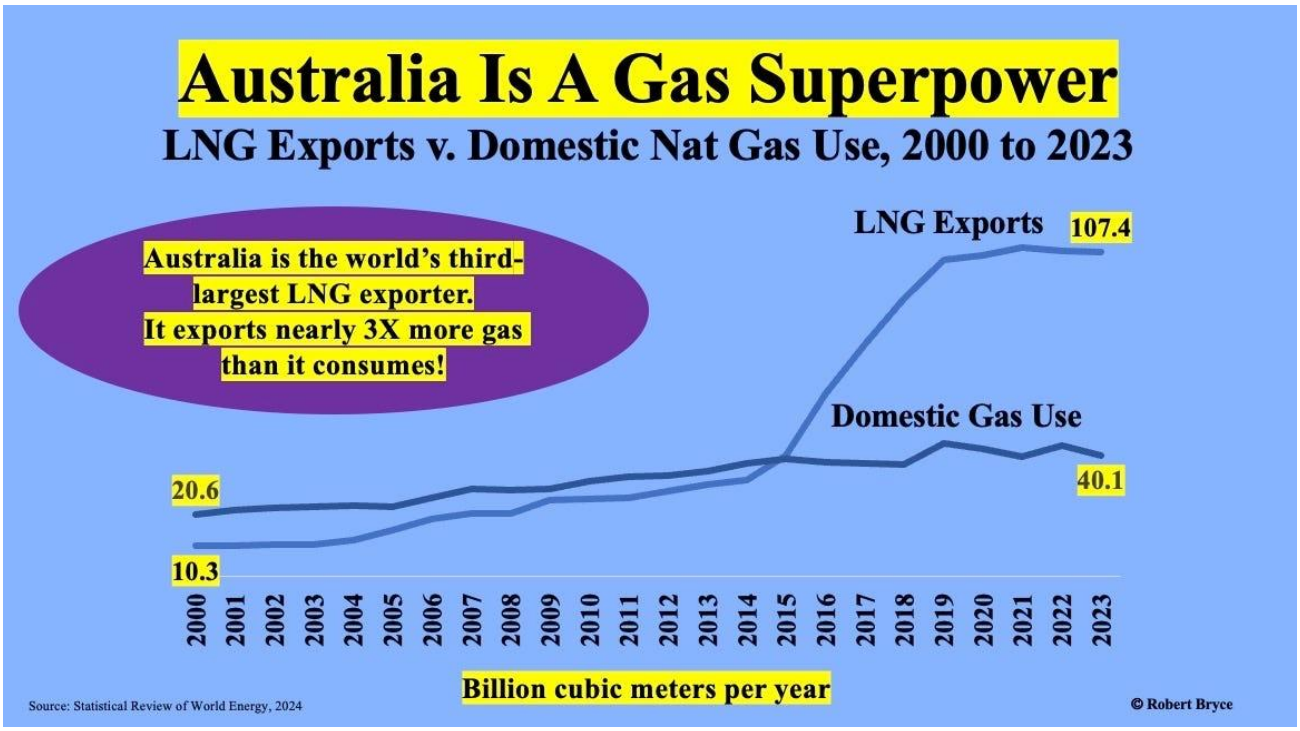
As seen below, China and India burn more coal every week than Australia burns in a year. Despite these facts, Australia is rushing to close its coal-fired power stations. The country expects to close its last coal plant by 2038.



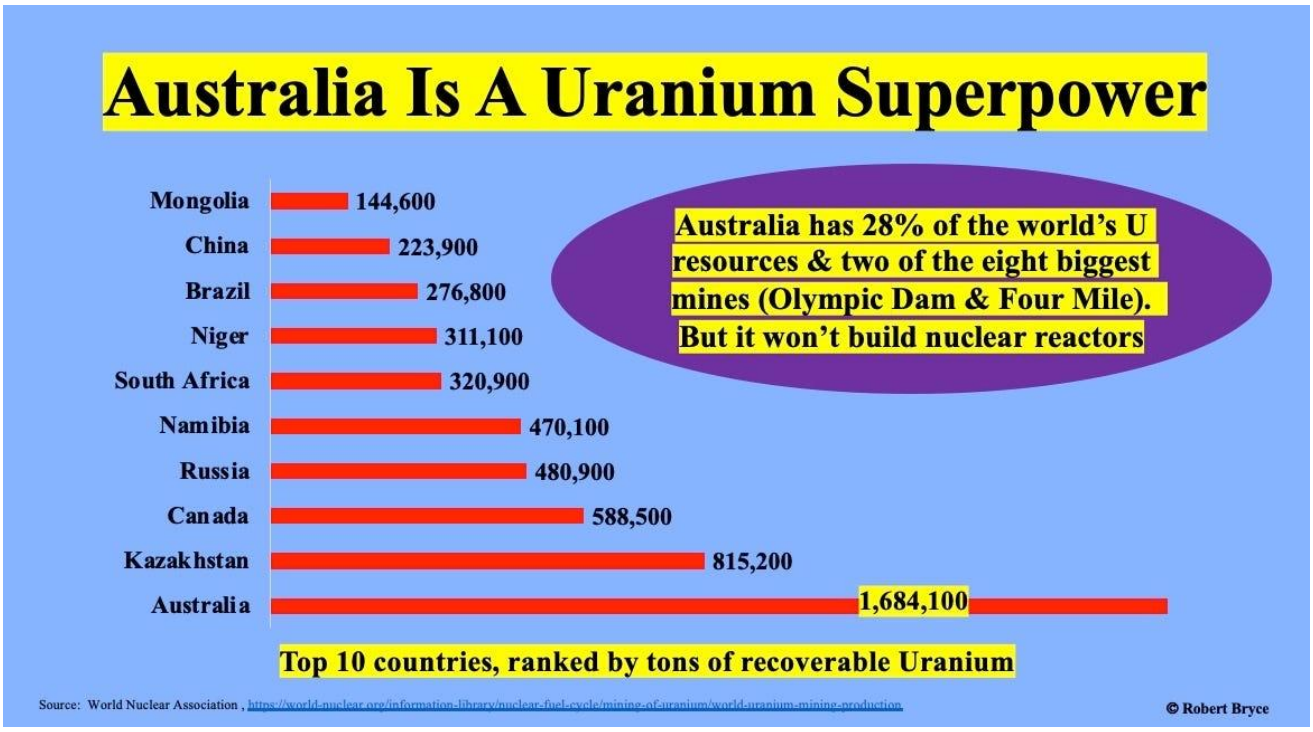
As noted above, Australia exports massive amounts of coal. In fact, it exports about seven times more coal than it consumes domestically.



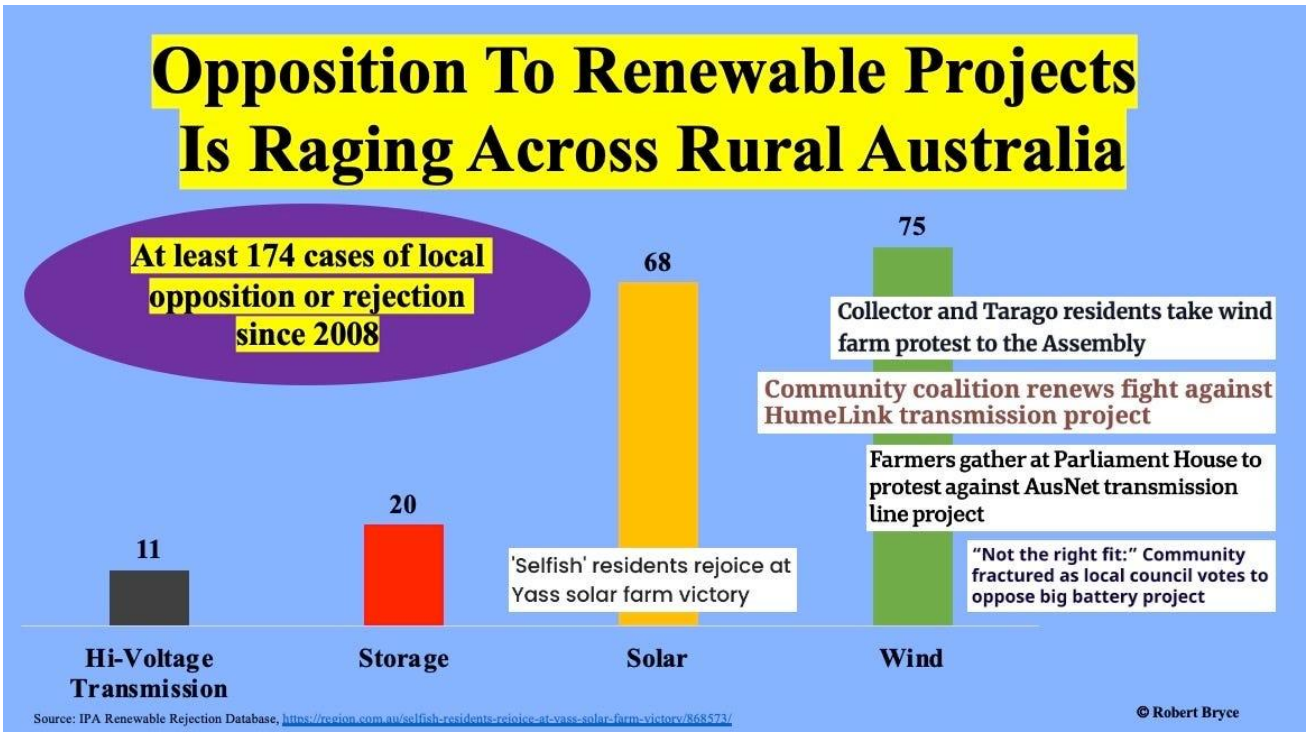
Australia is the world's third-largest exporter of LNG, and it now exports nearly three times more gas than it consumes. Despite the country's gas riches, according to the Australian Energy Regulator, wholesale gas prices have tripled over the past decade. Why are prices rising? Some analysts blame LNG exports, but the hard truth is that Australia hasn't developed sufficient pipeline infrastructure, and despite warnings from regulators about future shortfalls, it isn't drilling enough gas wells to ensure future supplies.



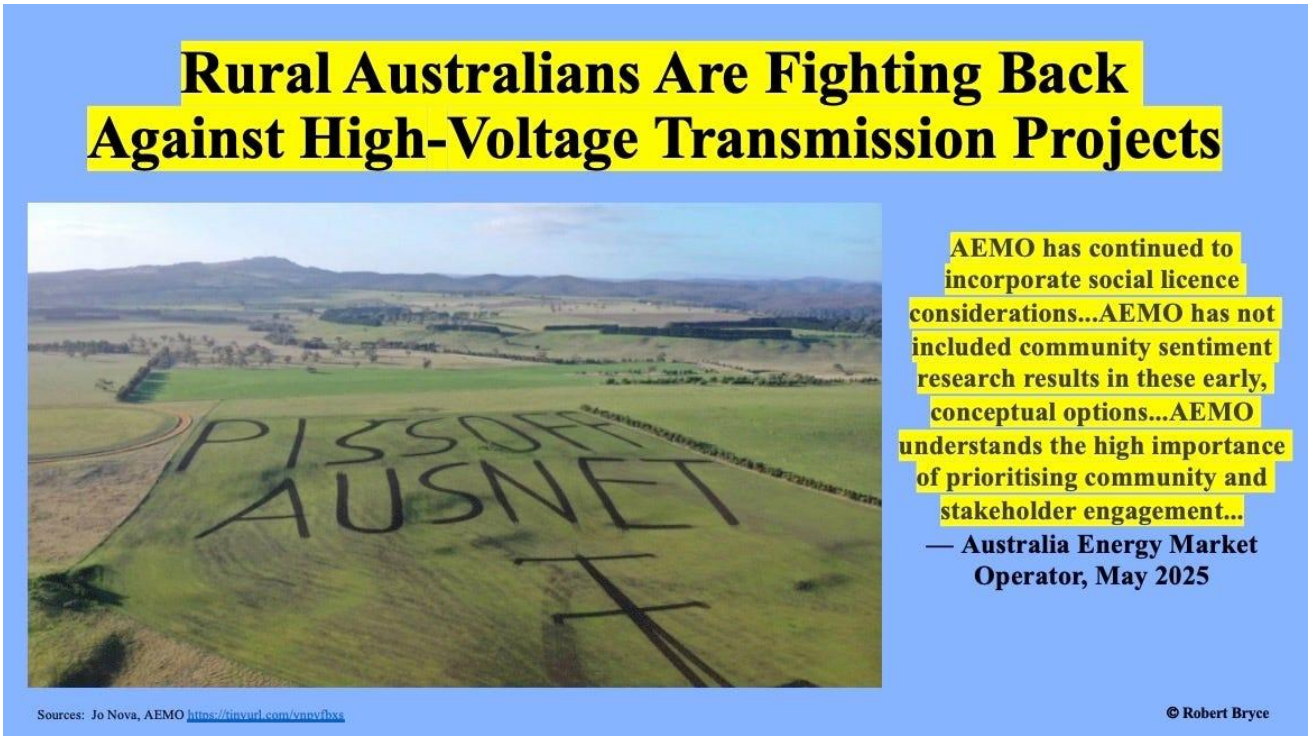
Nuclear power continues to be the most viable option for reducing the world's reliance on coal-fired generators. Indeed, China is now building more nuclear power plants than any other country. And yet, Australia, which sits atop nearly one-third of the world's uranium reserves and produces about 8% of the world's uranium, refuses to build nuclear reactors.



The Albanese government claims that Australia can depend on new alt-energy projects. However, rural residents from Perth to Cairns are fighting back against the encroachment of large solar and wind projects. As seen below, the Institute of Public Affairs has recently created a renewable rejection database that includes the rejections and cases of local objections to transmission, storage, solar, and wind energy that have occurred across Australia over the past few years. (The IPA will do a formal launch of the new database over the next few weeks.)



Furthermore, rural Australians are fighting plans by AusNet, Transgrid, and other companies to string high-voltage transmission lines across their farms and ranches. As seen below in the photo below, which was published by my friend, the fearless Aussie writer Joanne Nova, farmers and graziers across Australia are telling the companies to, um, go away. Meanwhile, the Australian Energy Market Operator is mouthing words about "social license," knowing that rural Aussies are outraged by plans for massive expansions of the high-voltage grid.



The punchline here is obvious: Australia cannot — *will not* — achieve net zero by 2050. It's an impossible task. Nevertheless, it appears the country will waste a *lot of money* pretending that it can.

I will close with a link to a piece just published by David Turver here on Substack called "Net Zero Is A Far-Left Tyrannical Death Star." As Turver, a savvy observer of Britain's energy system notes, net zero around the world is "crumbling." He points out that New Zealand is backtracking on its net zero claims and that Indonesia and Argentina may soon pull out of the Paris climate deal. Turver might be overstating it a bit — but only a bit — when he says that net zero is a "project of the big-state tyrannical far-left." And we should pray Turver is correct when he predicts that the "net zero death star will eventually be destroyed by the forces of freedom and market economics."

As the old saying goes, from his lips to God's ears.

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