

Cracking the Climate-Conscious Hard Commodities Code: Discovering Their True Value (Epilogue)

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cost & Profit

- ⌘ The **Industrial Revolution** 🚨, spanning the late 18th to 19th century, was fueled by coal, driving economic progress for decades—just as China heavily relies on coal to support EV production today. History has shown the cost of prolonged fossil fuel dependence, and repeating the same mistakes is not an option. **Profit** enables **action**, but sustainability should guide it. The goal should be achieving profitability within a framework that **balances**⚖️ cost and environmental impact .
- ⌘ Energy transition requires significant investment. Yes, it's a **cost**—but also a **responsibility** for what we've taken, whether intentional or not.

Auto

- ❖ Cost-cutting 💰, as seen with Tesla, or strategic partnerships like Volkswagen-Rivian and Hyundai-GM, reflect the industry's push to stay competitive. But demand hasn't shifted, and trimming costs alone isn't a lasting solution. True progress comes from collaboration that drives **innovation**, not just **efficiency**.
- ❖ Regardless of politics, **Tesla** has been crucial in advancing the energy transition. More than just a car maker, it brought EVs into the mainstream. Tesla didn't invent the EV, but it was the one to truly integrate electric mobility into daily life, giving us confidence in the future of EVs 🌟.
- ❖ And as **BMW**'s CEO Oliver Zipse noted: "Hydrogen is the missing piece of the puzzle for emission-free mobility, because a single technology 🔬 will not be enough to enable climate-neutral mobility worldwide." ([Link](#))

President Biden

- ❖ The **EV mandate**, rolled out through executive action, lacked the infrastructure needed, causing stalled EV adoption and slowed production. With demand and supply misaligned, the transition has struggled 
- ❖ Like the auto industry, policies are **cyclical**—they're easy to announce but tough to reverse. EIA data shows that from December 2023 to November 2024, electricity sales to transportation remained flat, with oil still dominant. Energy transition requires proactive leadership and a coordinated, industry-wide effort — climate change isn't a **solo** act. 

President Trump

- ❧ A four-year term may bring a so-called “**golden age**★” starting January 20, 2025, but without a commitment to the Paris Agreement, the estimated \$1 trillion saved won’t stop rising temperatures, heat stress, or droughts. And when food supplies like rice suffer, billionaires won’t be the first to feel it—it’ll be the very voters who backed the 47th president of the U.S. They won’t feel it now, but their children will.
- ❧ “**\$1 trillion**” sounds impressive today, but can it buy **another** Earth  ?
- ❧ What kind of **temperature**  is the president setting up for your **grandkids’ future**?
- ❧ The orange skies over New York in 2023 and California’s relentless wildfires weren’t **anomalies**—they were **warnings** . Climate change doesn’t follow political cycles, and ignoring it now only makes tomorrow’s problems worse.

“Extremism”

- ❖ If energy companies see "**climate extremists**" as headwinds, isn't **pulling out** of the Paris Agreement just another extreme move? Can a strong economy really have a "soft landing"  without sustainability, simply through deregulation?
- ❖ People have different priorities based on their backgrounds, and disagreements are inevitable. But extremes are **emotions**, not **solutions**.
- ❖ Sometimes, **timing** matters more than the **solution** itself. And like it or not, we're all on the clock for net zero 2050. 

