



Planet Pulse

**A rhythmic check-in on
climate issues**



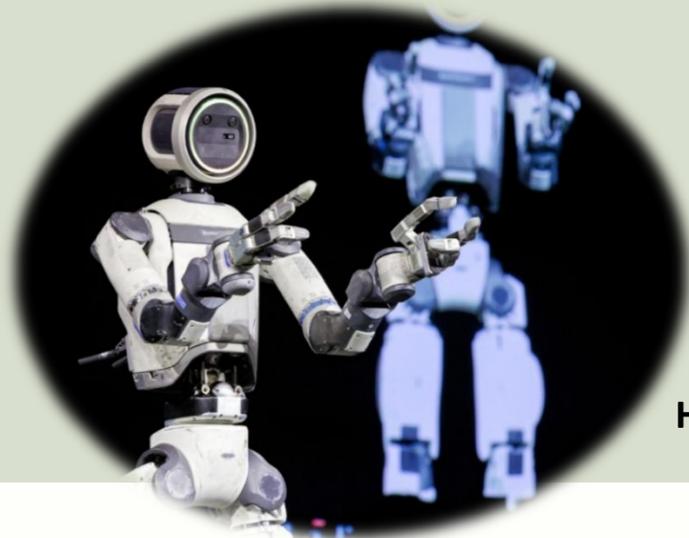
An about time turnabout

- Last week I highlighted the critical role Taiwan plays on the world stage and how the island nation is a microcosm of the global challenge to transition to clean energy.
- One issue was Taiwan's decision to shutter all its nuclear plants.
- Adding momentum to the much-needed rejuvenation of global nuclear energy, the country is doing an about face.
- Its ruling Democratic Progressive Party - which has consistently opposed nuclear - announced proposals to restart at least two of three shuttered nuclear plants.
- The country will also consider building new plants either with small modular reactor or fusion technology.



NEXT PAGE





Hyundai Atlas Prototype



Robots anyone?

- This is my poke fun at Tesla post.
- Elon to investors: Forget about EVs. The future is robots.
- Musk's high profile has garnered the Optimus lots of press.
- But because I prefer substance over style, my bet is on anyone other than Tesla.
- Hyundai has poured billions into robotics, attracting talent from both Tesla and Nvidia.
- The price tag on its Atlas robot is \$100k. It sounds expensive, but deployed as full time a "worker" it would cost less than the \$7.25 federal minimum wage.
- And according to research firm Omdia, at much lower price points, Chinese manufacturers produced the lion's share of the 13,000 humanoids shipped last year.
- As for Optimus, it does a nifty demo.

Hyundai Motor Worth More Than GM After Robot Rally

Current market value in US dollars

Hyundai Motor General Motors



Source: Bloomberg

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Bloomberg

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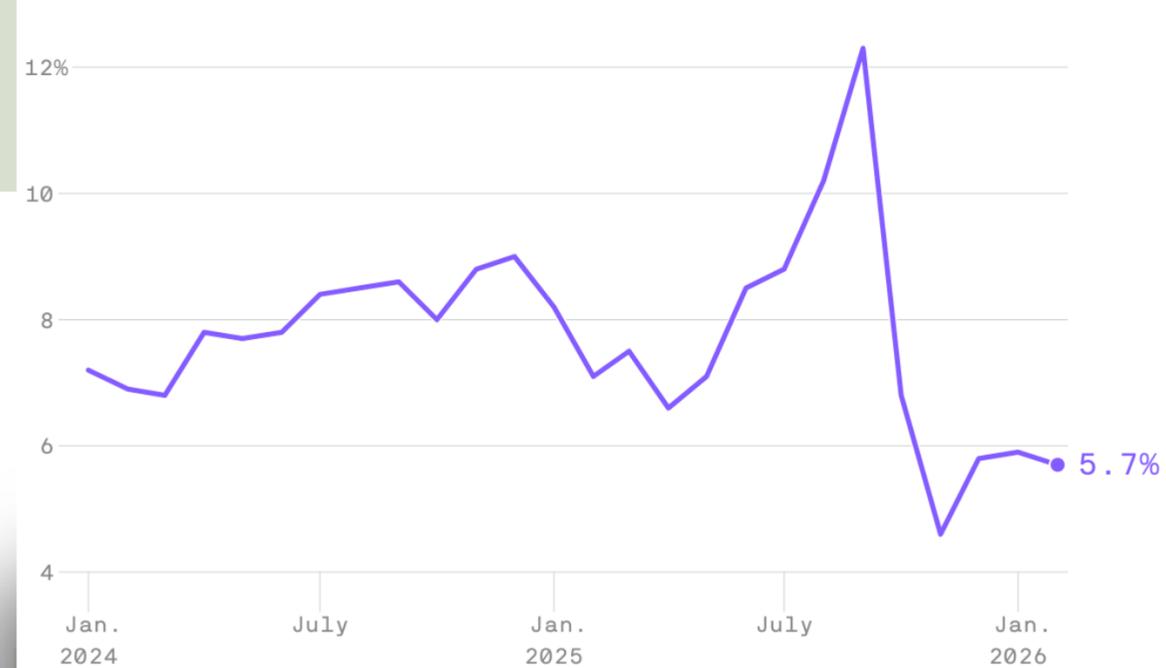


NEXT PAGE



Fully electric vehicles' share of U.S. light duty sales

Monthly; January 2024 to February 2026; Data for 2026 is estimated



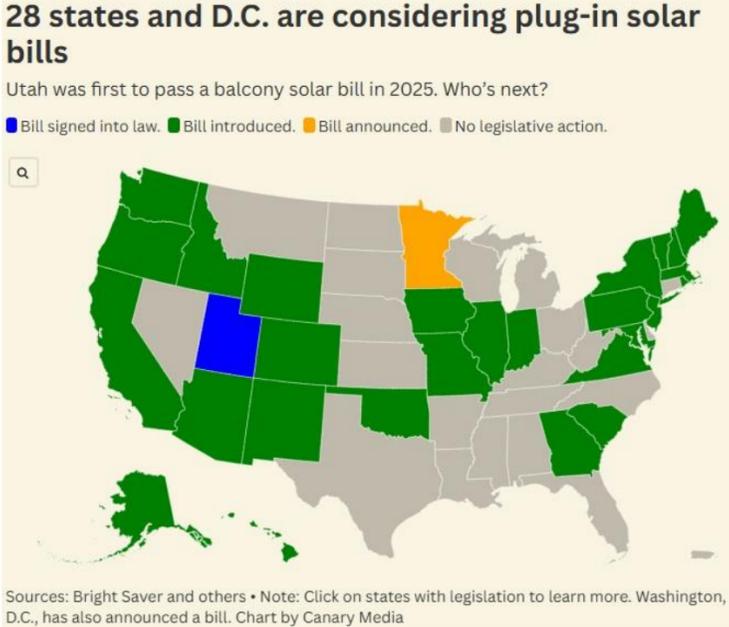
Robots better catch on

- Speaking of EVs, it's going to be a very bad year for Tesla and the industry as a whole, at least in the U.S.
- As expected, with the elimination of the \$7,500 federal tax credit, EV sales have fallen off a cliff.
- But it isn't only U.S. manufacturers that are struggling.
- Last month, BYD - the world's leading producer of EVs - recorded its largest sales decline since COVID.
- BYD exports registered an increase, but not near large enough to compensate for a 65% decline in domestic sales.
- It will be interesting to see how Tesla, and worldwide EV sales fare this year.

NEXT PAGE



Balconies can offer more than a view



I want to end this week’s Plant Pulse on a positive note.

I’ve been tracking balcony solar for a couple of year now. The first post highlighted Germany, which as of mid-2025, had over 1 million systems registered.

Subsequent posts have focused on balcony solar catching on in America.

As you would expect, regulations and safety issues have been a bottleneck, but that’s changing.



In more than half of U.S. states both Republican and Democratic lawmakers have introduced legislation for DIY solar.



Currently, an 800-watt unit costs about \$1,100 and can power a frig or a few small appliances.



In New York, that could reduce a utility bill by about \$280 annually, making the payback better than most rooftop systems.



Unbiased and Unfiltered

An honest assessment of the cleantech industry and the effort to stem climate change.

