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Tesla's highway: Are electric cars really natural gas vehicles?

In October 2013, Gas Matters reported a US industry veteran's view that his all-electric Tesla Model S was, indirectly, actually running on gas – transformed into electricity by marginal gas-fired power in the local grid. Indeed, though electric vehicles (EVs) are widely regarded as the fossil fuel antidote, CCGTs are one of the primary sources of electricity used to charge their batteries. To the extent that that is the case (at least in much of the US), electric cars are really just natural gas vehicles. In this article, we revisit the argument of almost two years ago. Much has changed in the world of gas, automobiles and EVs, so are the assumptions still true? Are EVs a significant source of demand for pipeline gas and LNG? And has the linkage between gas markets and EVs strengthened or dimmed?



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