



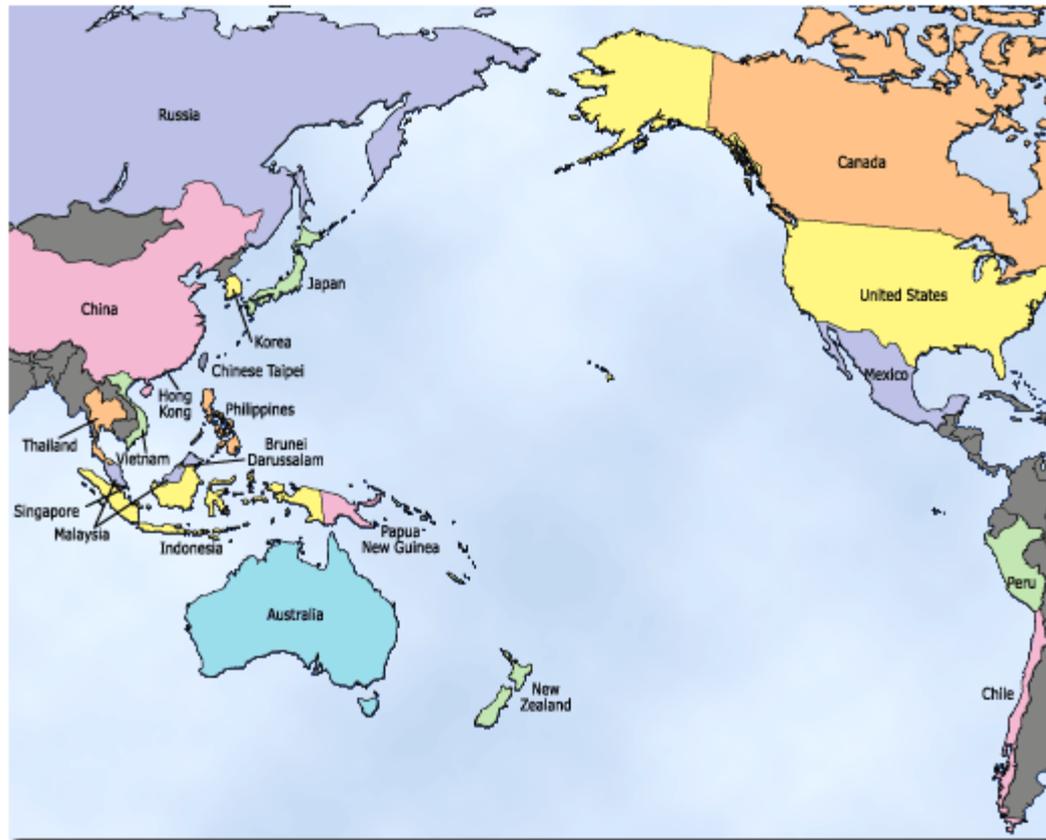
APERC Annual Conference
26 February 2013

APEC Energy Demand and Supply Outlook

Summary of Key Findings

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Asia Pacific Energy Research Centre (APERC)

APEC Member Economies



The background features a collage of images related to energy and technology. On the left, there's a blurred image of a train. In the center, a globe is visible. To the right, there are images of a modern building facade and a busy street with cars. A large, stylized blue cloud-like shape is overlaid on the right side of the collage.

Background on APERC

- Asia Pacific Energy Research Centre supports the energy activities of APEC with
 - Research, especially analysis of energy supply, demand, and greenhouse gas emissions
 - Cooperative programs to promote energy efficiency and low-carbon energy
- Funded by the Japanese government and based in Tokyo
- Currently has 18 staff members, including 10 visiting researchers from APEC economies other than Japan
- Legally a subsidiary of IEEJ, but APERC research is directed by the APEC Energy Working Group and the APEC Expert Group on Data and Analysis

APEC Energy Outlook



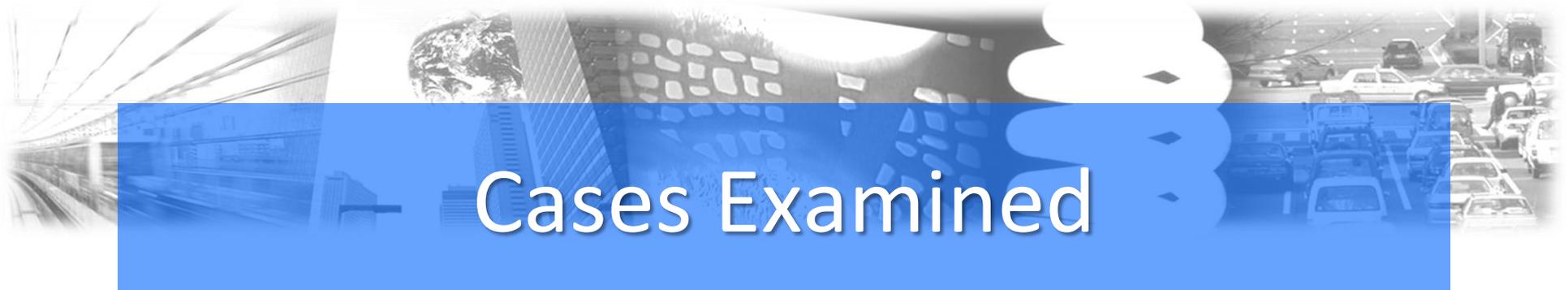
APEC

**Energy Demand and
Supply Outlook
5th Edition**

February 2013



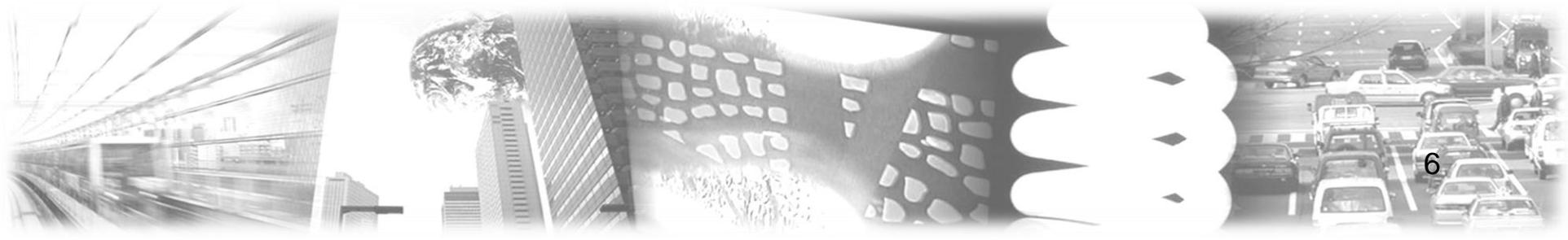
- APERC has historically produced an *APEC Energy Demand and Supply Outlook* every 3 or 4 years
- The 5th Edition was published last week!

The background features a collage of images including a train, a globe, a modern building, a stylized cloud, and a busy street scene with cars. A semi-transparent blue horizontal band is overlaid across the middle of the collage, containing the title text.

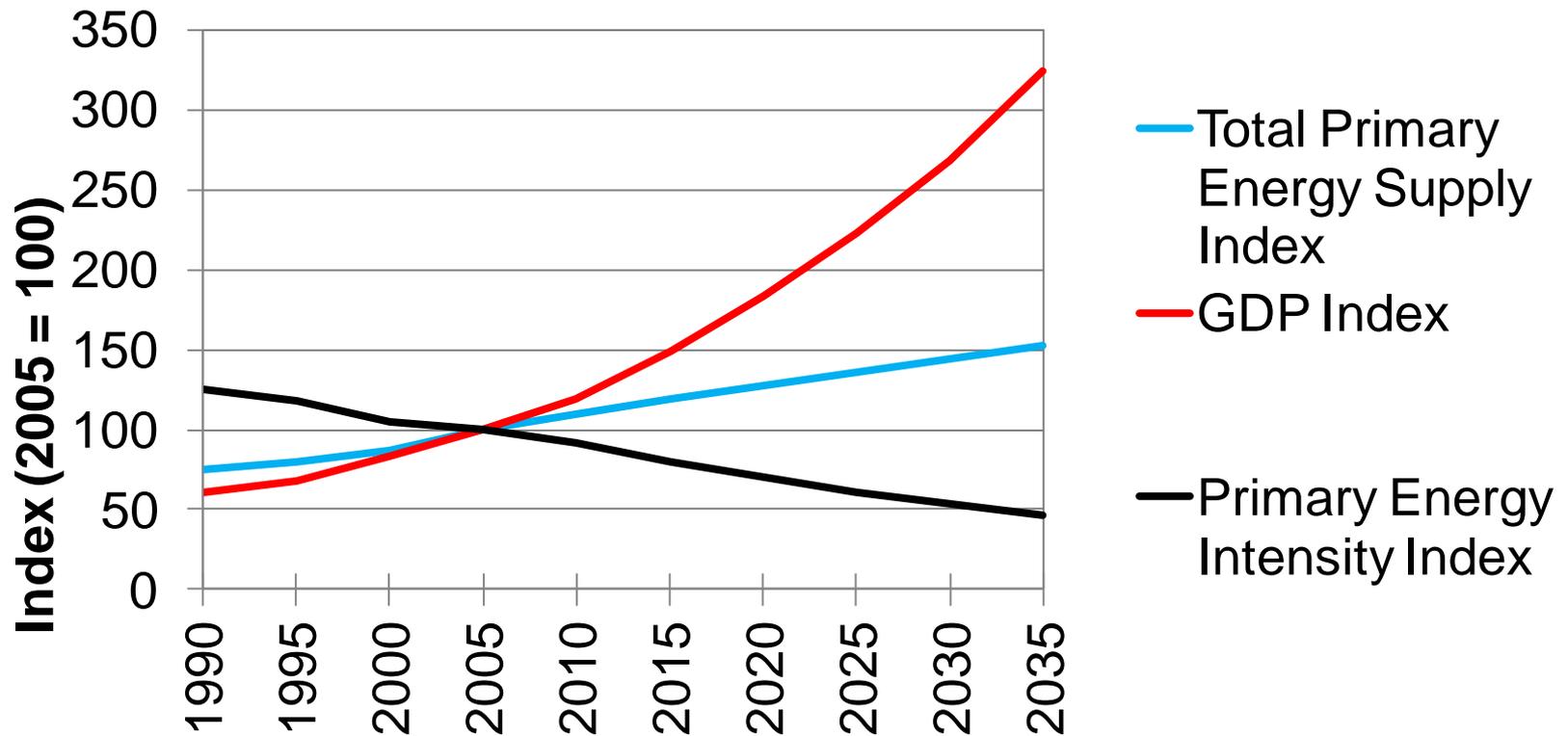
Cases Examined

- “Business As Usual” (BAU) – Assumes existing policy continues, including policies in process of implementation (legislation already approved)
- Three Alternative Cases:
 - High Gas Case
 - Better Urban Planning
 - Virtual Clean Car Race

Key Findings

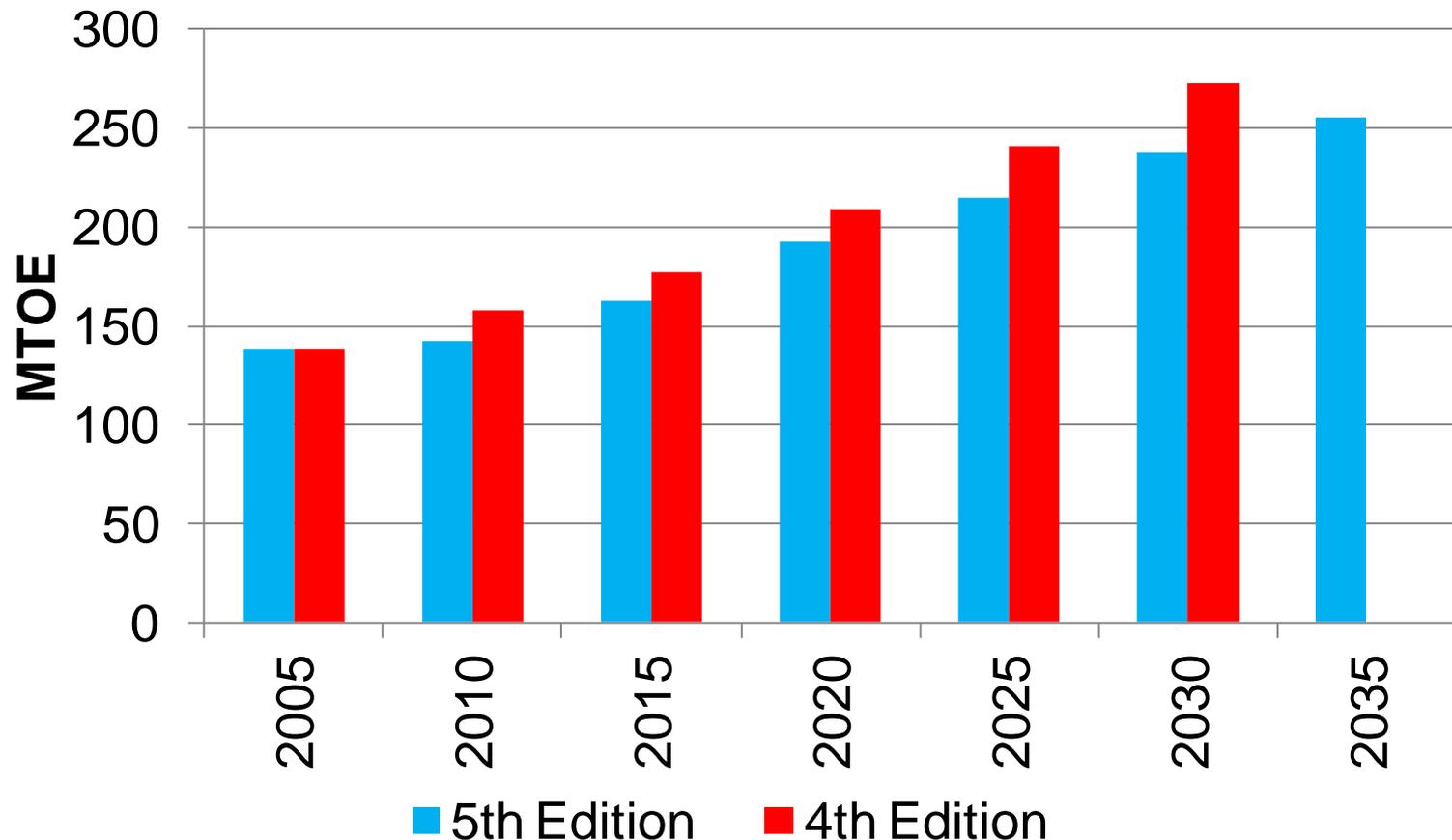


Key Finding #1: APEC's energy intensity goals will probably be met under business-as-usual



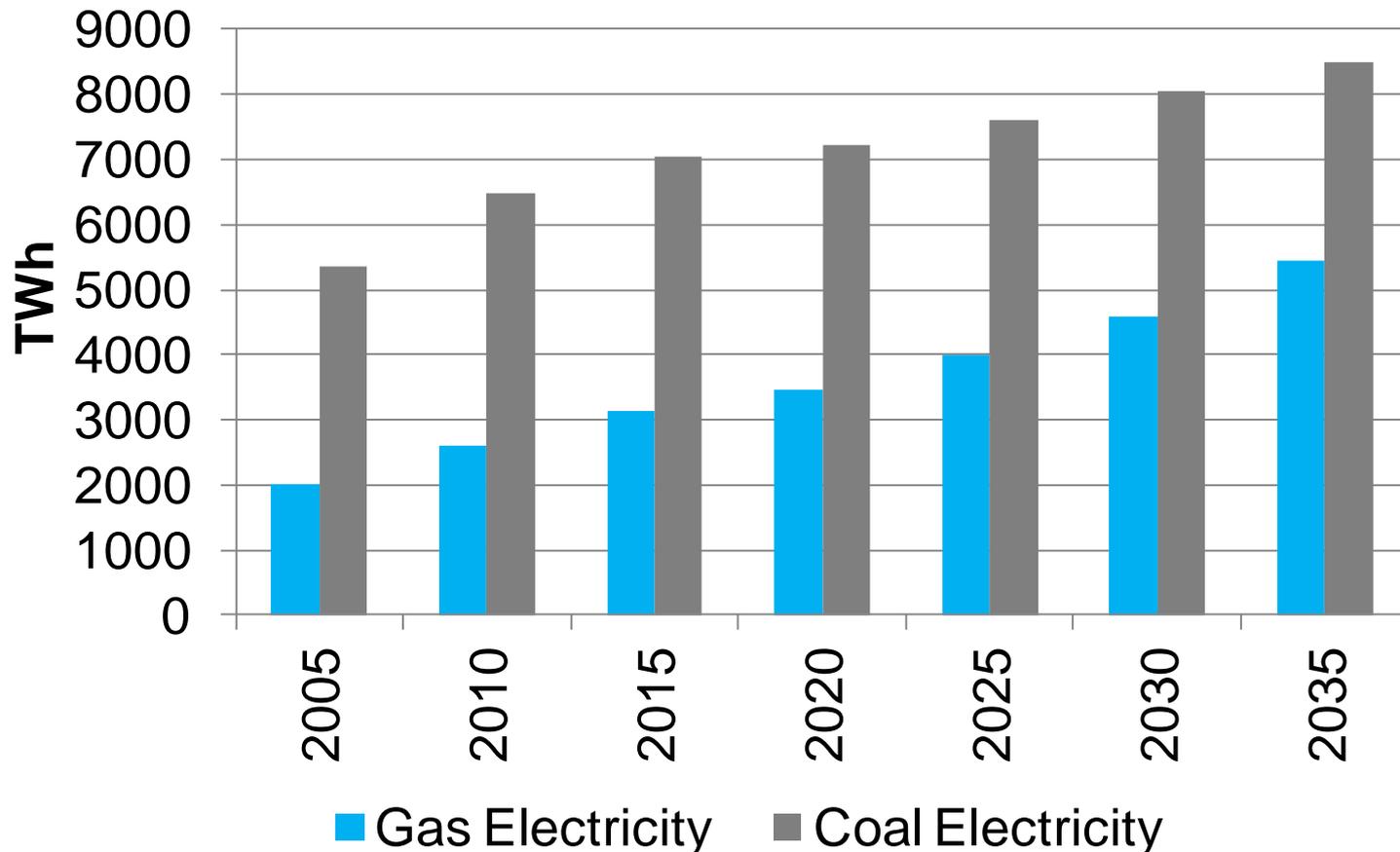
Key Finding #2: Nuclear development slows down, but not by much

APEC nuclear electricity production



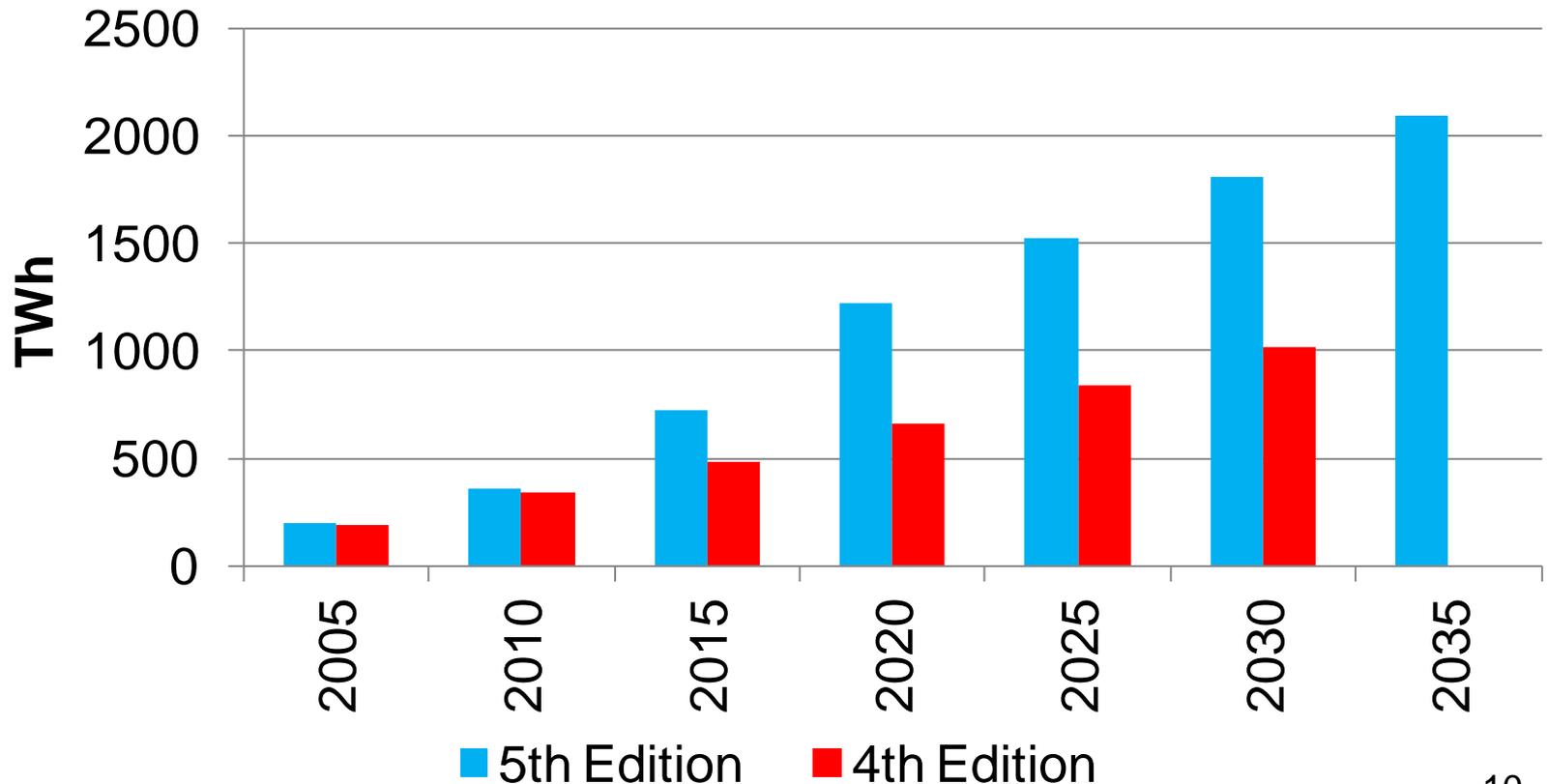
Key Finding #3: Gas production growth speeds up, and could challenge coal

APEC electricity output by fuel

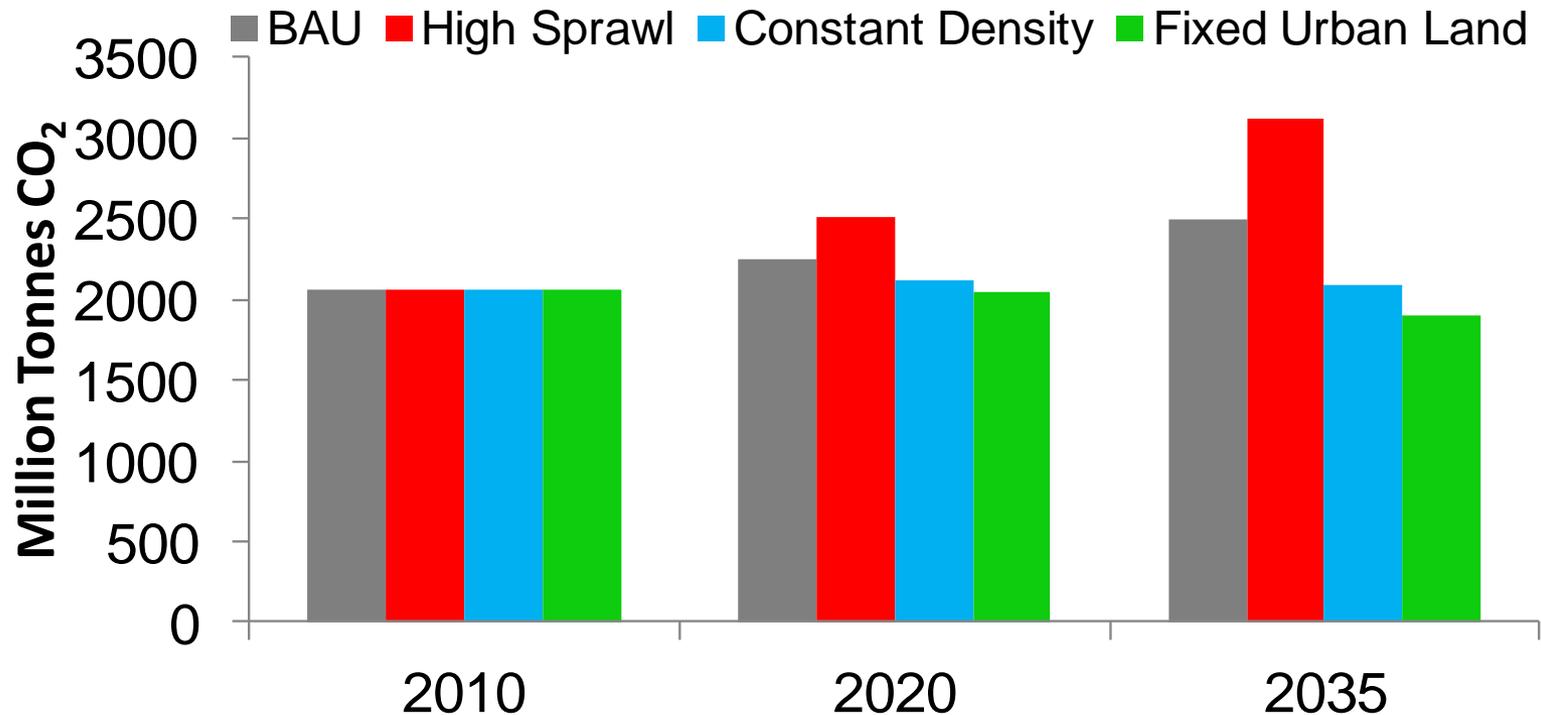


Key Finding #4: New Renewable Energy (NRE) goes mainstream

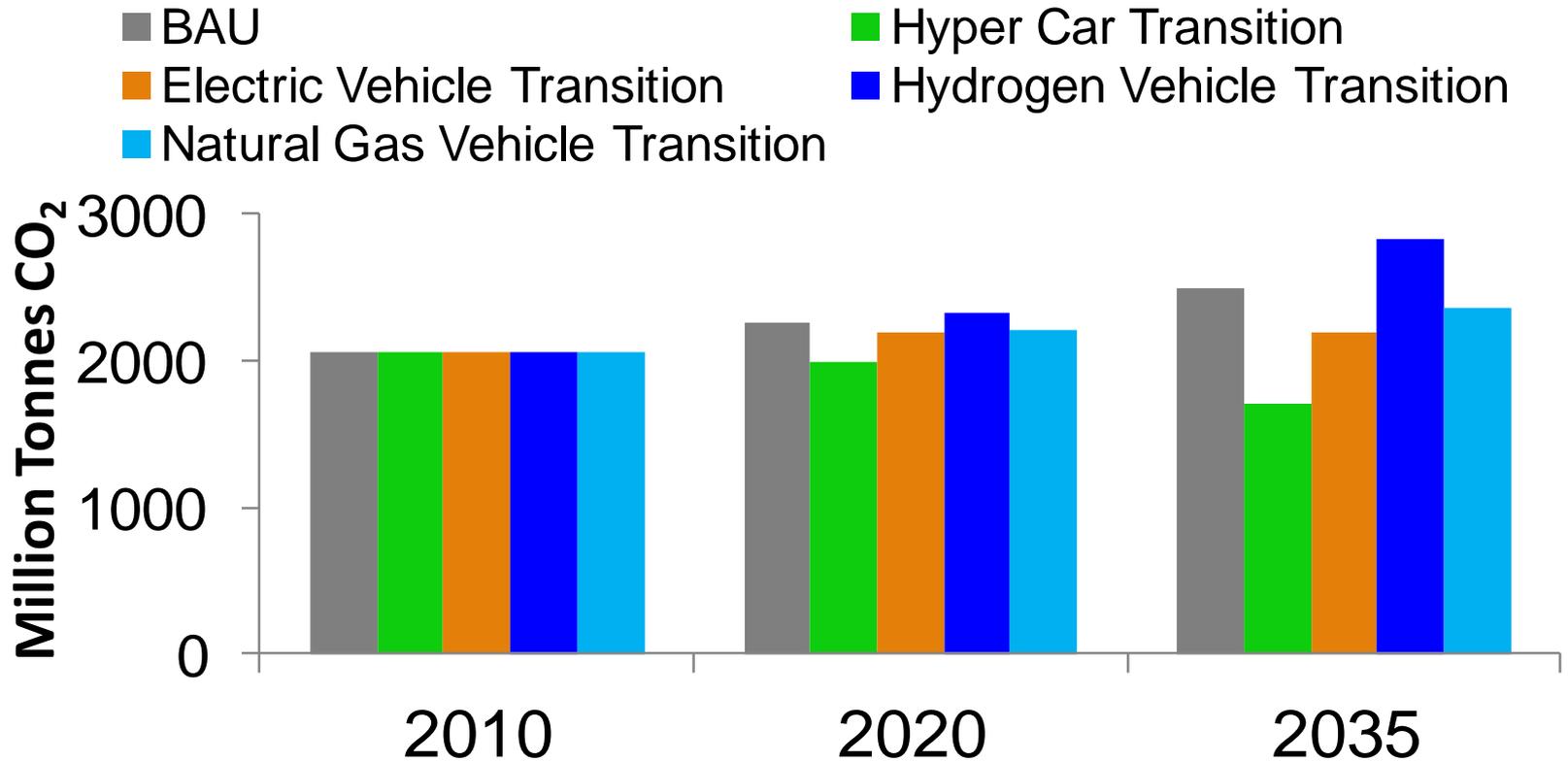
APEC electricity generation from NRE



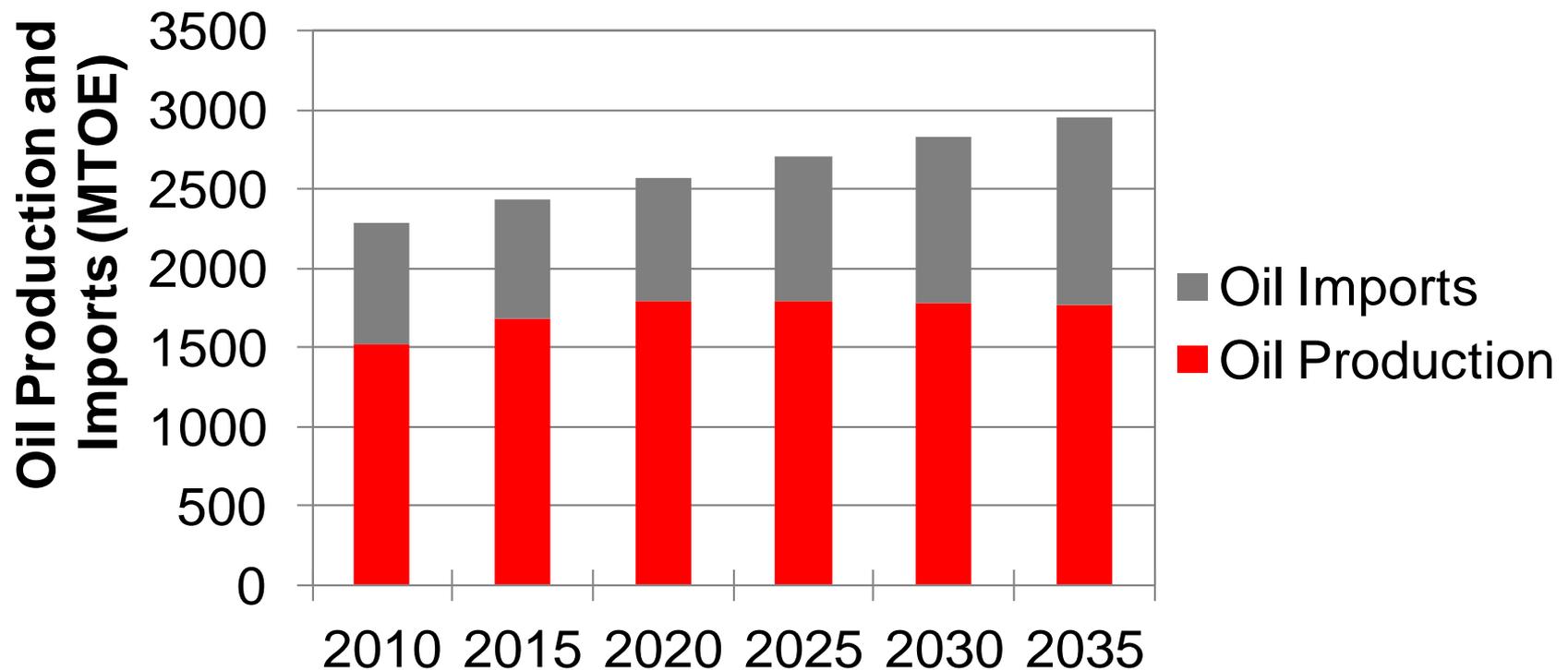
Key Finding #5: Big Opportunities to Improve Efficiency, Especially in Transportation Through Better Urban Planning...



...and Improving the Efficiency of the Vehicle Fleet

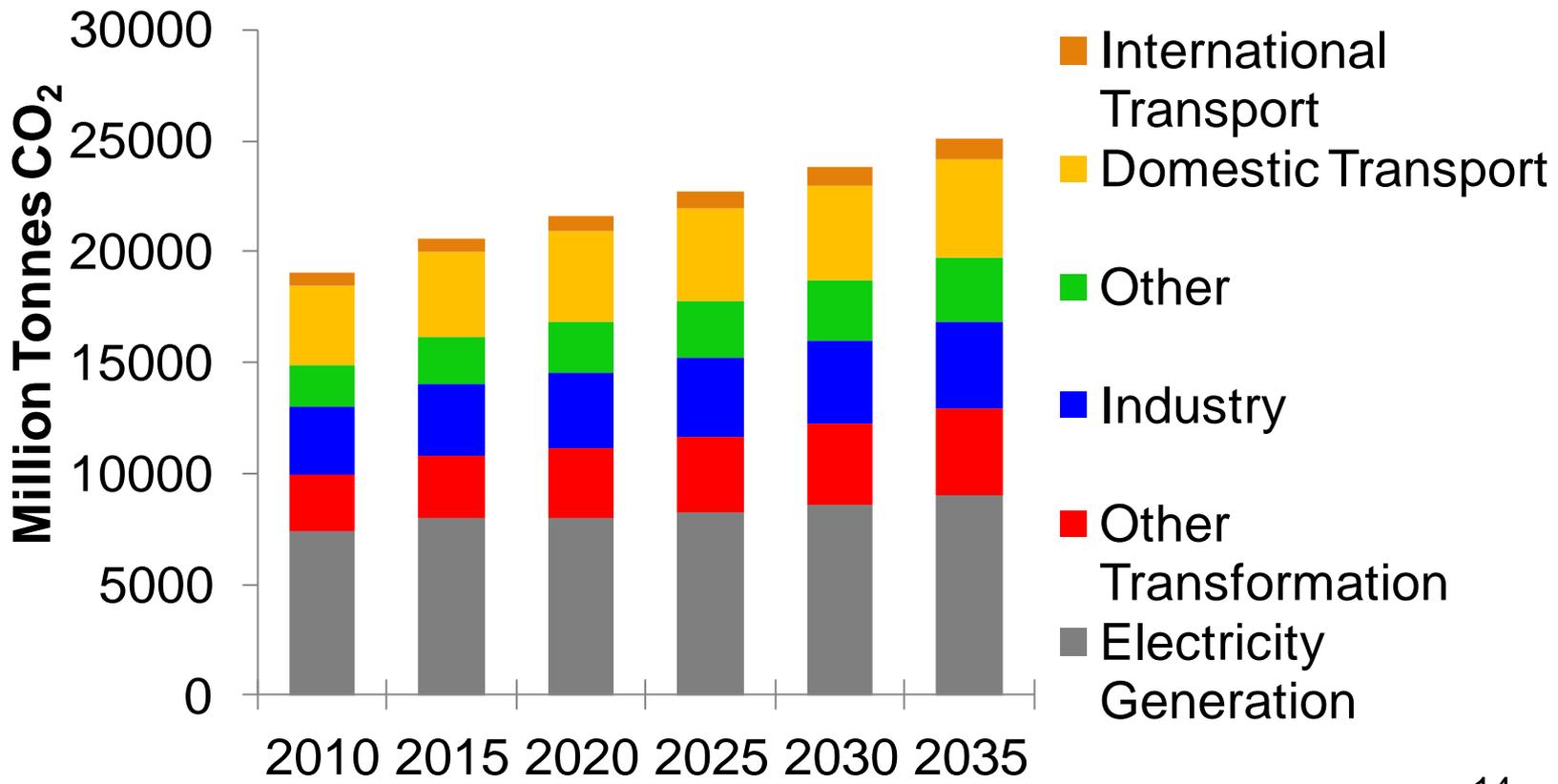


Key Finding #6: Oil security remains a major threat to the economies of the APEC region



Key Finding #7: Business-as-usual is still environmentally unsustainable

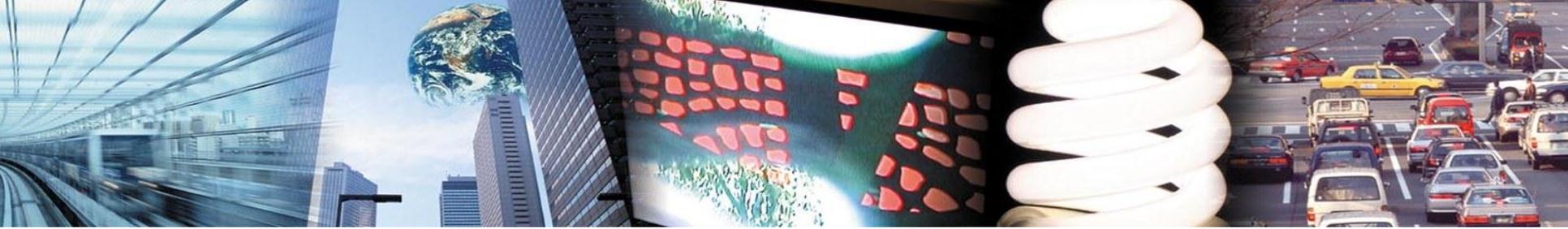
APEC CO₂ emissions from fuel combustion



The background features a collage of images related to energy and transportation. On the left, there's a blurred image of a train. In the center, a globe is visible. On the right, there's a busy highway with many cars. The entire background is overlaid with a blue semi-transparent banner that contains the title.

Recommendations

1. *Educate* – Policymakers cannot take action without the support of their stakeholders and constituents.
2. *Promote Energy Efficiency (EE)* – Provide information and set standards for buildings, appliances, and vehicles; eliminate wasteful fossil fuel subsidies; provide financing for cost-justified EE investments; promote Energy Service Companies.
3. *Promote Energy Research* – Low carbon energy supplies, including renewables, nuclear, and carbon capture and storage; advanced vehicles; smart grids; building materials and designs; better communication as an alternative to transportation.
4. *Put a Price on Emissions* – A major market failure is due to the fact that those who emit greenhouse gas do not have to pay for the damage they are causing.
5. *Cooperate* – No one economy can do it alone. APEC has a big role here.



Questions and Discussion

