



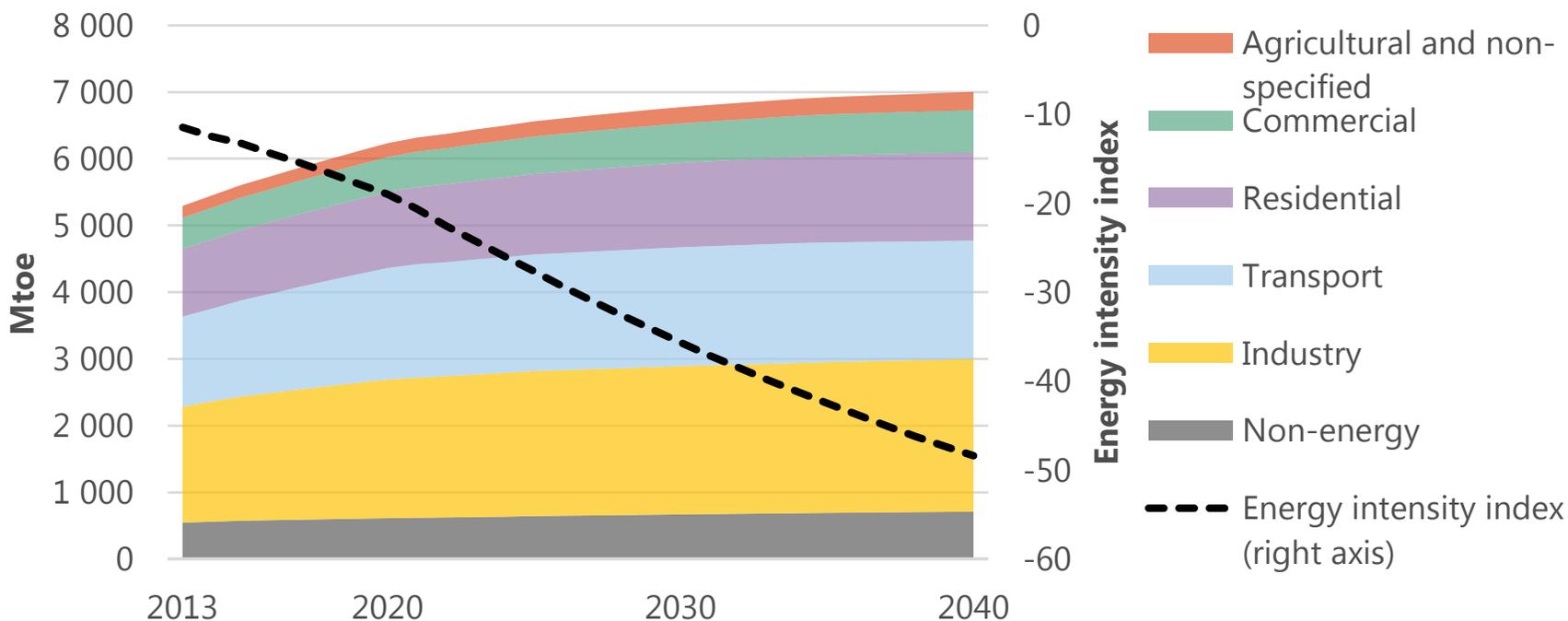
APEC Energy Demand and Supply Outlook 6th Edition

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Outlook for APEC Energy Demand

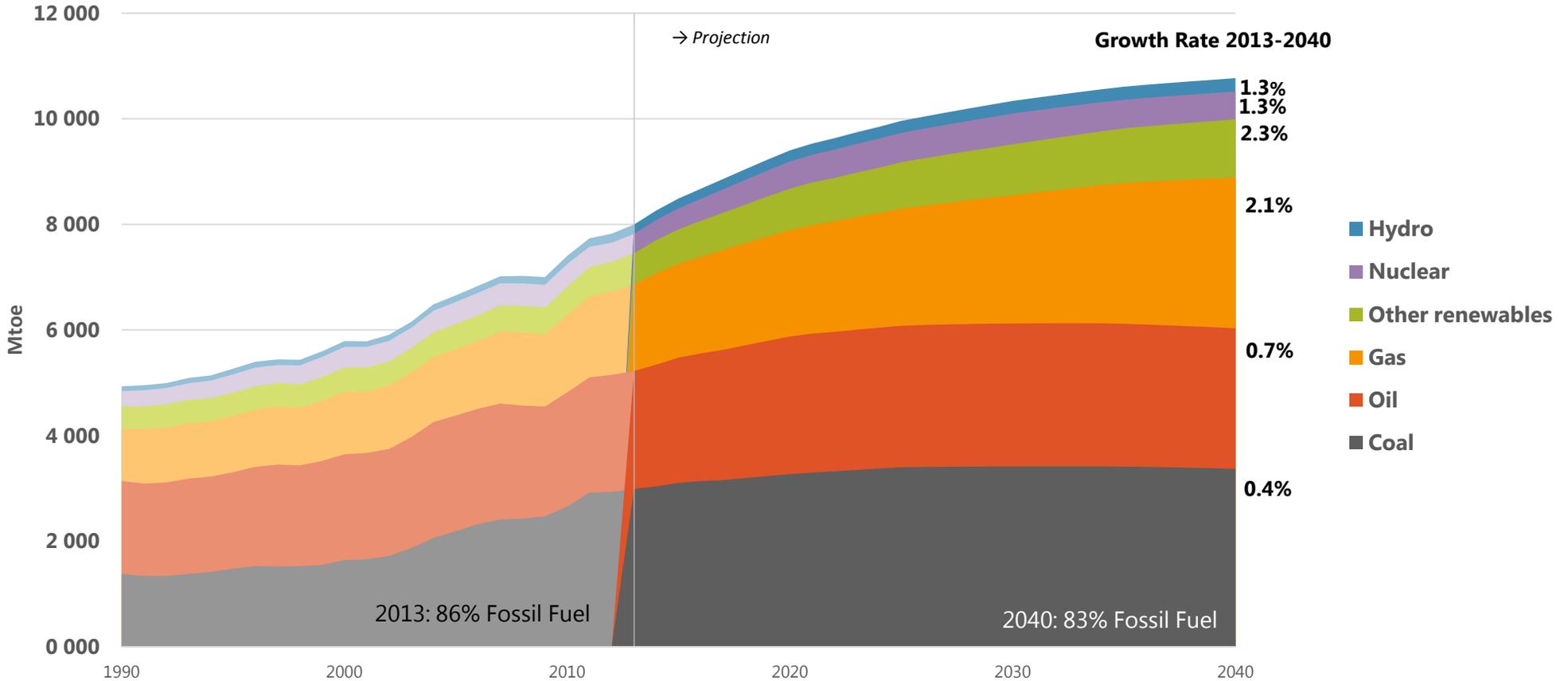
Final energy demand in APEC



Final energy demand rises 32% from 2013 level by 2040. APEC's energy intensity reduction target of 45% cannot be met by 2035 in the BAU scenario.

Fossil-fuels continue to dominate energy supply

APEC Total Primary Energy Supply



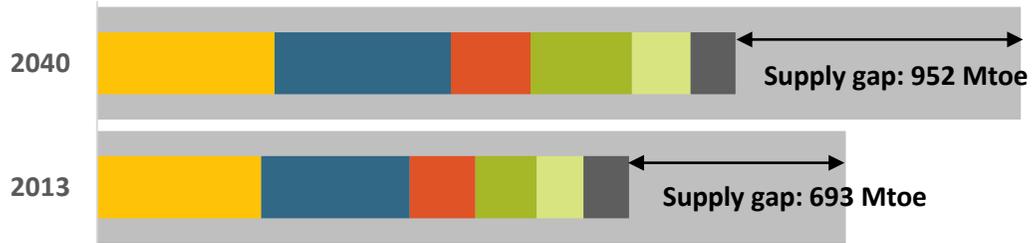
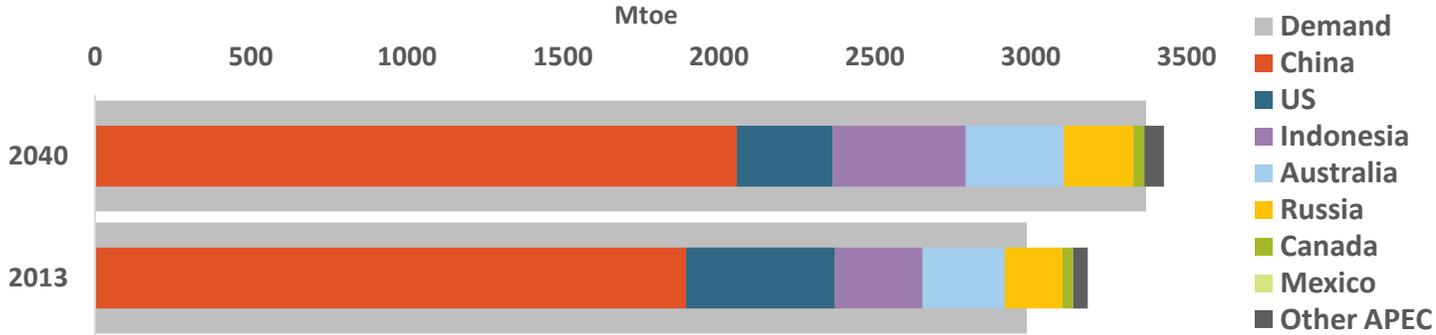
Energy supply in APEC region will more than double by 2040 from 1990 level.

APEC Energy supply gap rises

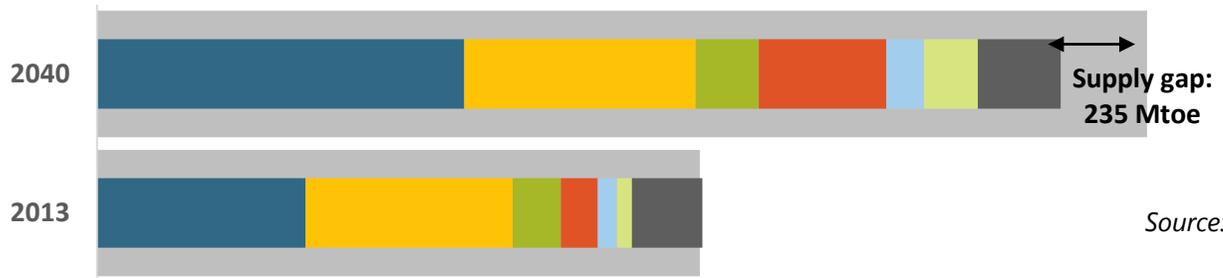
Fossil fuel production continues to increase ...



Coal production and demand



Gas production and demand



Oil production and demand

...but not enough to meet oil and gas demand

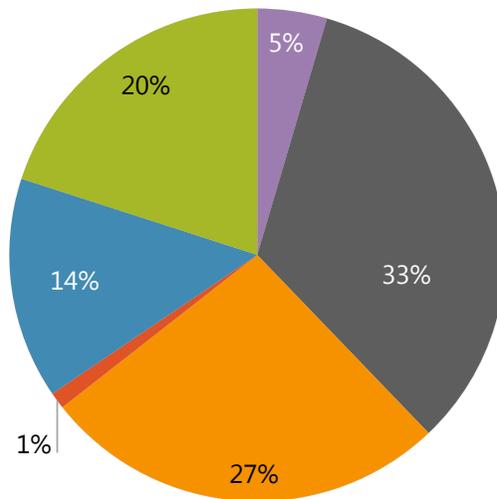
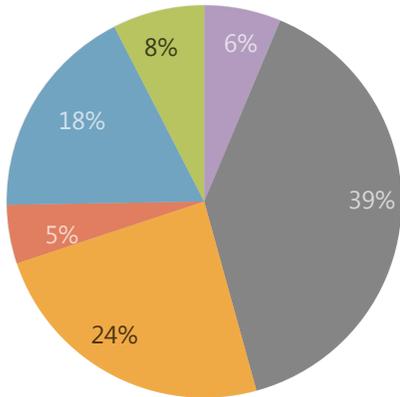
Source: IEA statistics 2015 and APERC analysis

Outlook for electricity sector

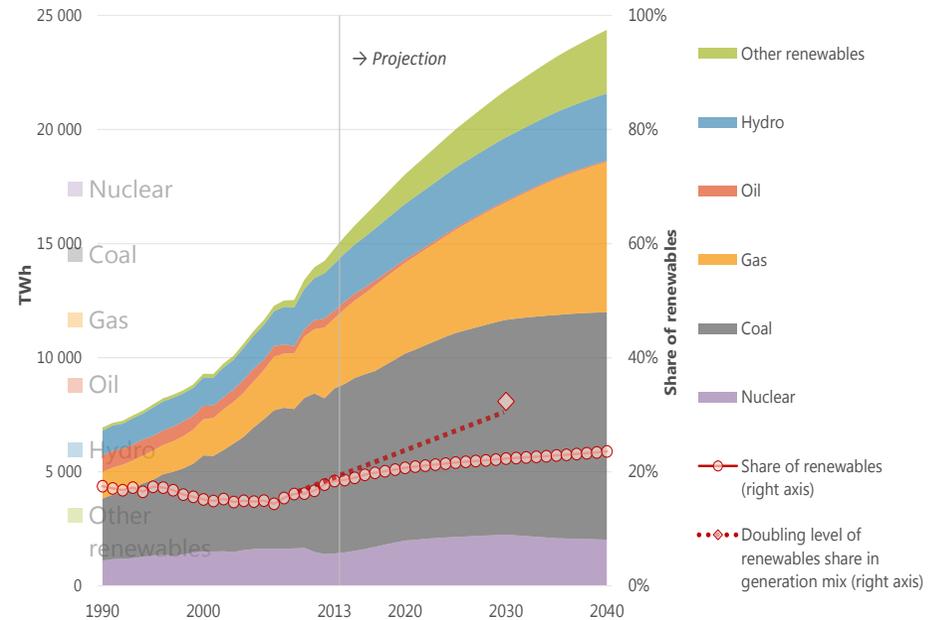
APEC installed capacity

**2013 Capacity:
3 564GW**

**2040 Capacity:
6 415GW**



APEC electricity generation



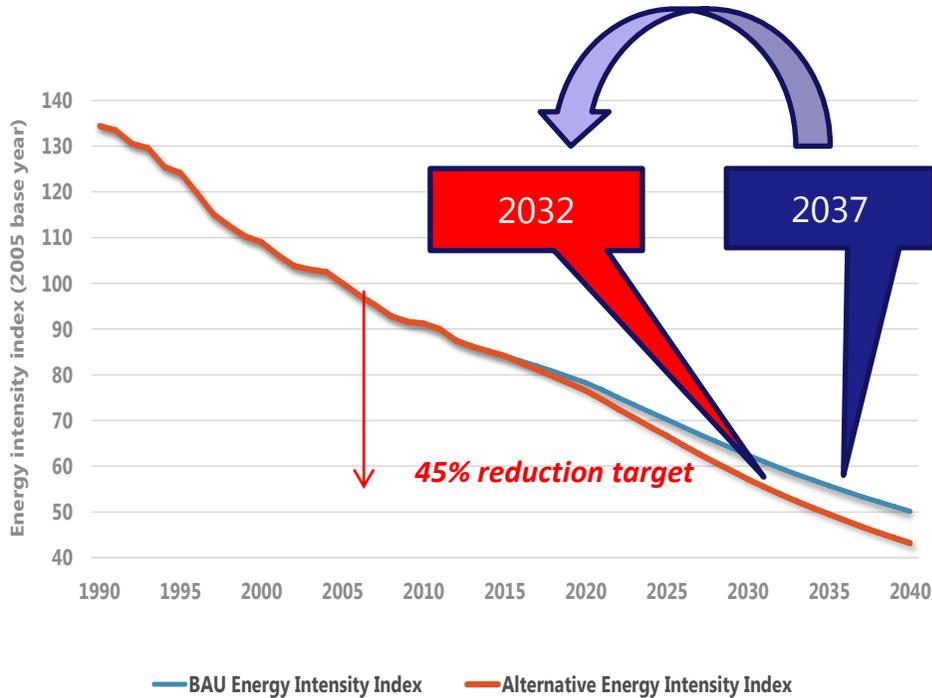
RE capacity expand to 34% by 2040, but fossil fuels dominate generation due to relatively lower RE capacity factors. Doubling not achieved by 2030 nor 2040 in BAU

Note: **Other renewables** include solar PV, CSP, onshore wind, offshore wind, biomass, geothermal and marine.

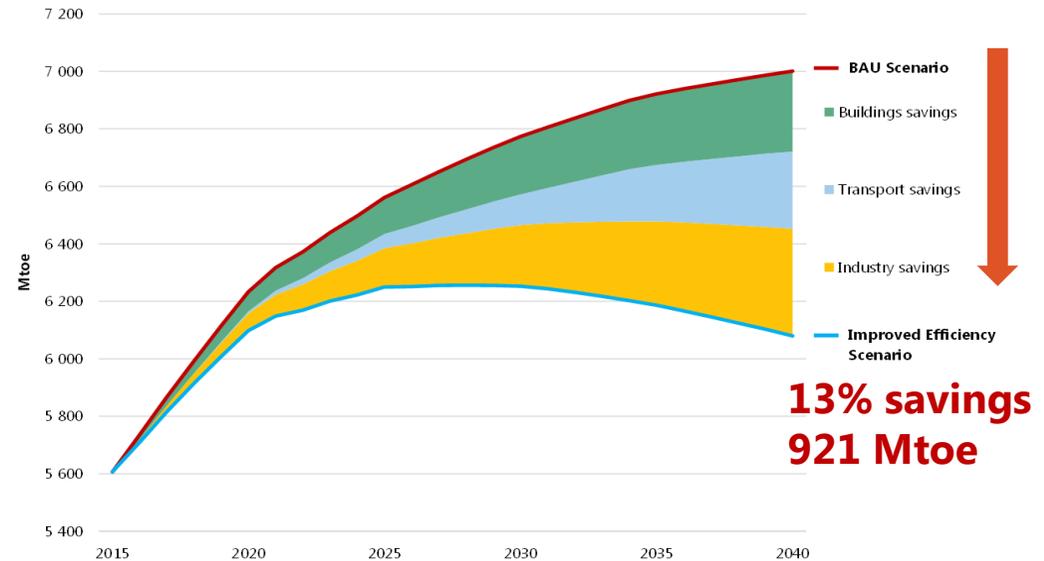
Improved Efficiency Scenario

APEC's target can be met by 2032 under the Improved Efficiency Scenario

APEC Energy Intensity target

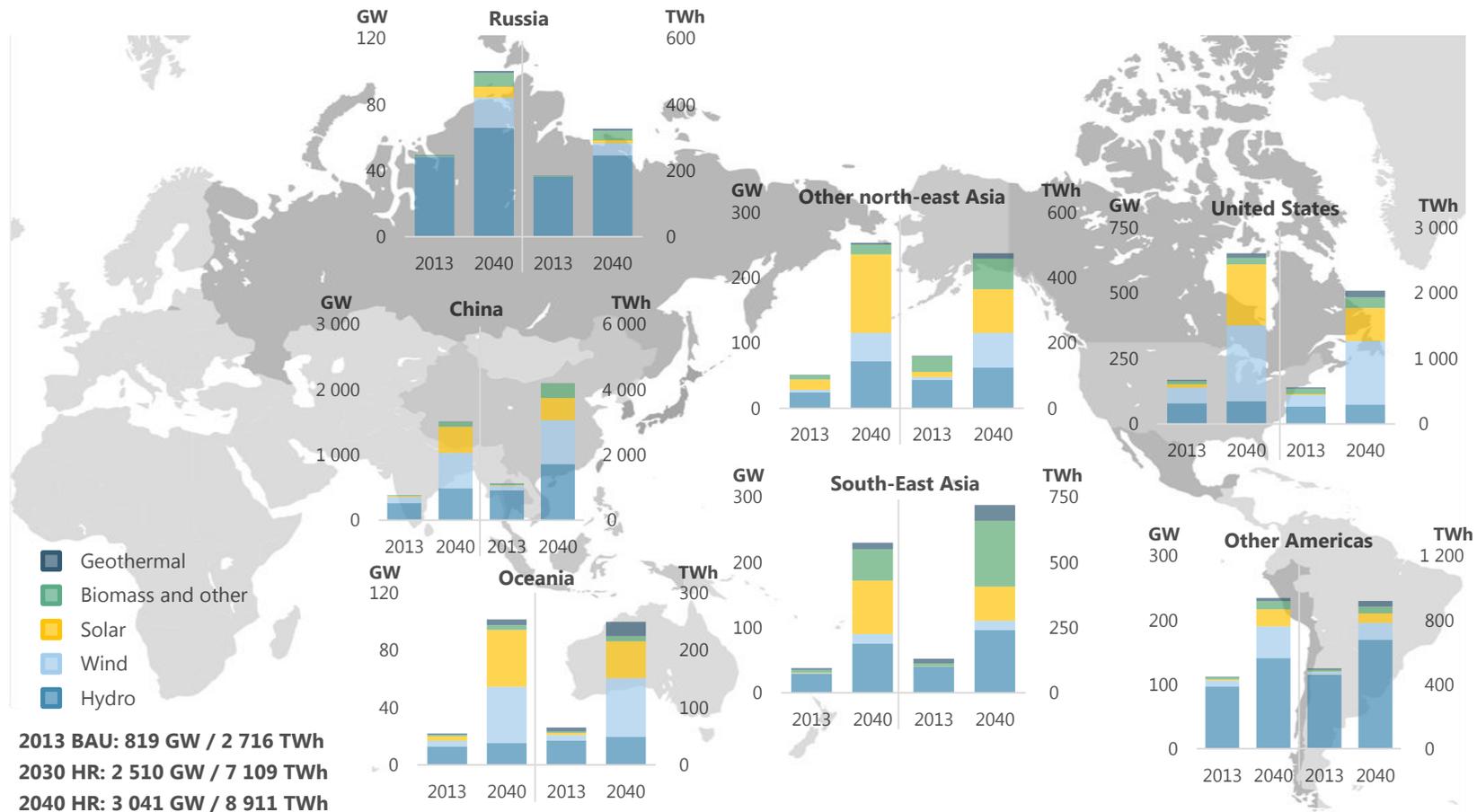


Overall results



Total savings of 921 Mtoe equivalent to the combined current demand of Russia, Japan and Korea.

High Renewables Scenario



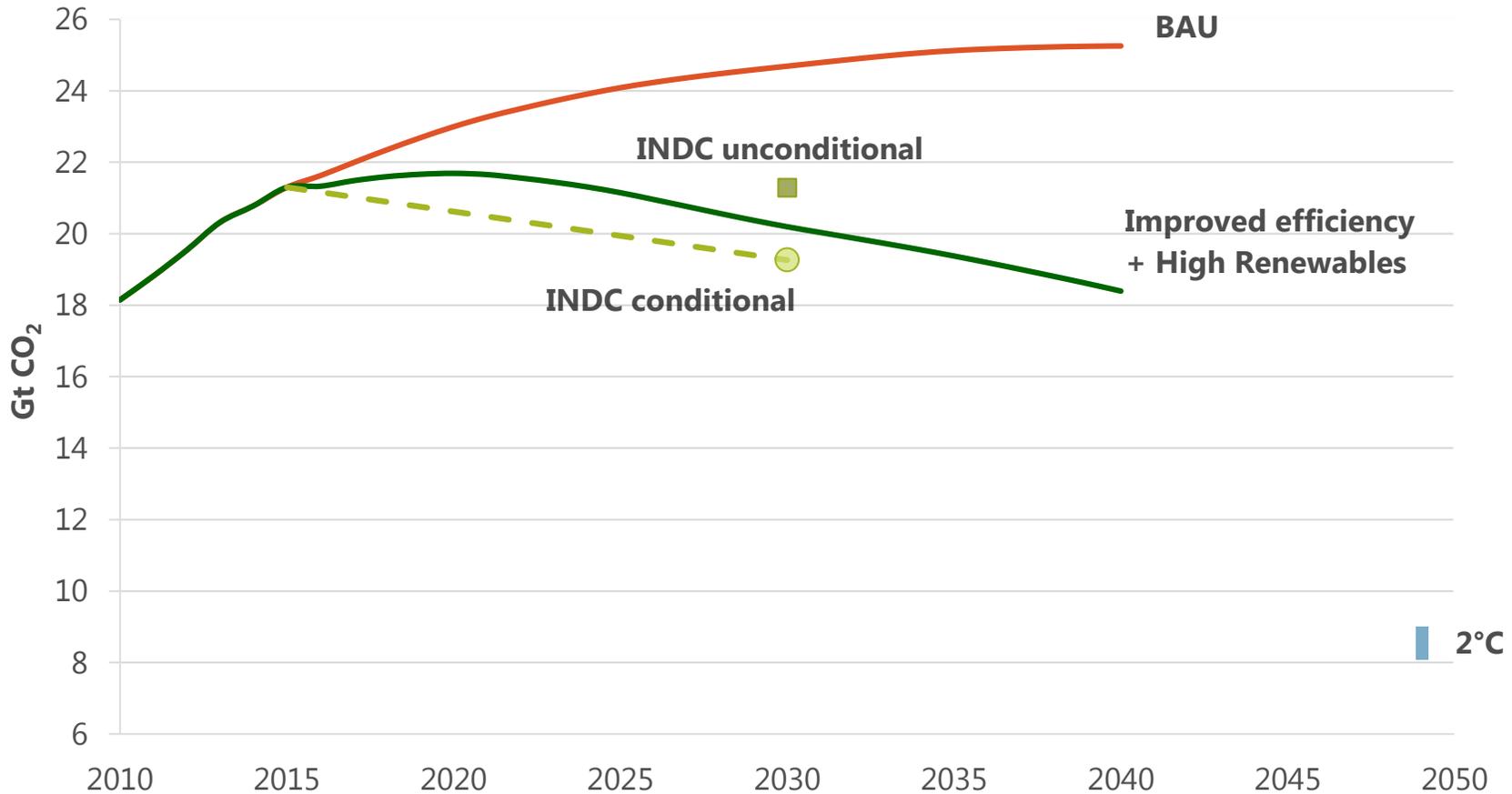
Pathway to doubling the share of renewables in power generation

Source: IEA statistics 2015 and APERC analysis

Note: this map is for illustrative purposes and is without prejudice to the status of or sovereignty over any territory, **Oceania** (Australia, New Zealand and PNG), **Other Americas** (Canada, Chile, Mexico and Peru), **Other north-east Asia** (Hong Kong, Japan, Korea and Chinese Taipei), **South-East Asia** (Brunei Darussalam, Indonesia, Malaysia, Philippines, Singapore, Thailand and Viet Nam), **BAU** = Business-as-usual, **HR** = High Renewables

APEC INDCs

Energy related CO₂ emissions



APEC economies need to raise INDC ambitions as well as APEC energy targets if the global climate goal is to be achieved



Thank you for your attention

<http://aperc.ieej.or.jp/>