



Session 5: APERC Research Activities

C. APEC Energy Overview 2014 and 2015

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Asia-Pacific
Economic Cooperation



Outline of Presentation

Project Context

The 2014 Overview
- Points to Consider

Quick Analysis of the 2014 Overview
- GDP, TPES, TFEC

Expected Time Frame for 2014 and
2015

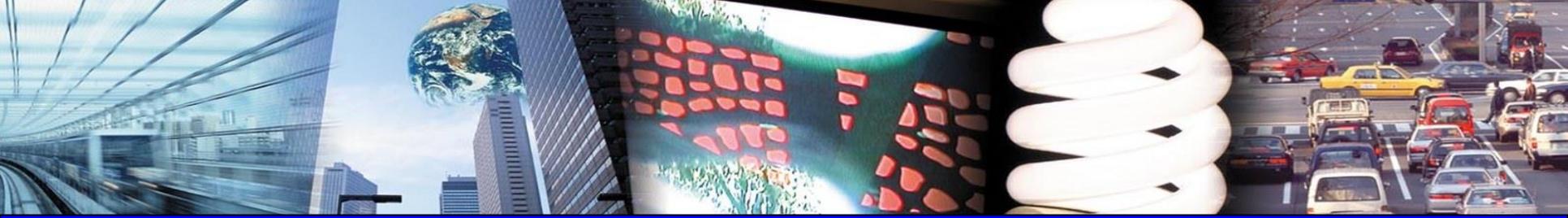


Project Context

- ❑ proposed by Australia during the EGEDA meeting held in Japan last March 2000 and approved at the EWG 19 meeting in April 2000;
- ❑ Since 2000, 13 editions posted at the website; drafting of the current edition ongoing;

APEC Energy Overview serves as a venue

- ❖ *to share (latest) information on government energy policies of member economies;*
- ❖ *provide useful information and insights to policy makers in the region; and*
- ❖ *Promoting the use of EGEDA data*



The 2014 Overview

❑ ***Introduction***

- Key data and economic profile (2012); energy reserves

❑ ***Energy Supply and Consumption for 2012***

- Primary energy supply
- Final energy consumption

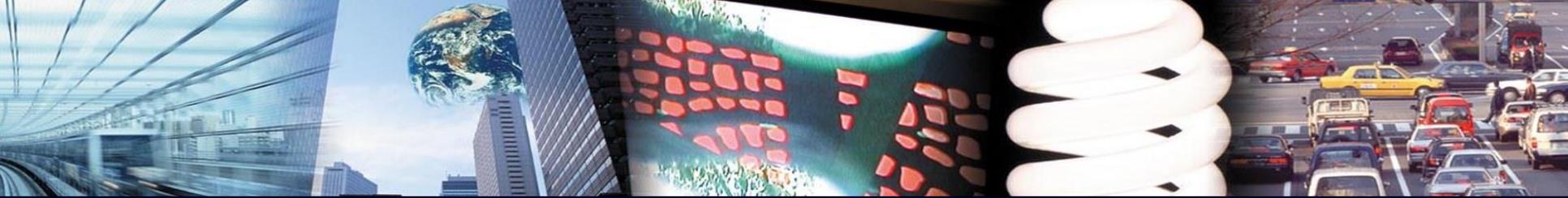
❑ ***Energy Intensity Analysis (additional feature)***

❑ ***Policy Overview (can be the latest)***

- Energy policy goals, objectives and strategies

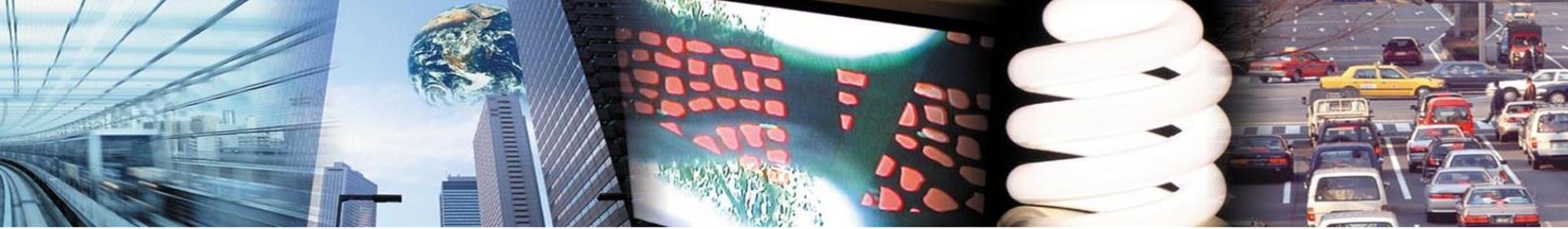
❑ ***Notable Energy Developments***

- Changes to policies, regulations and programs
- Energy projects and infrastructure development

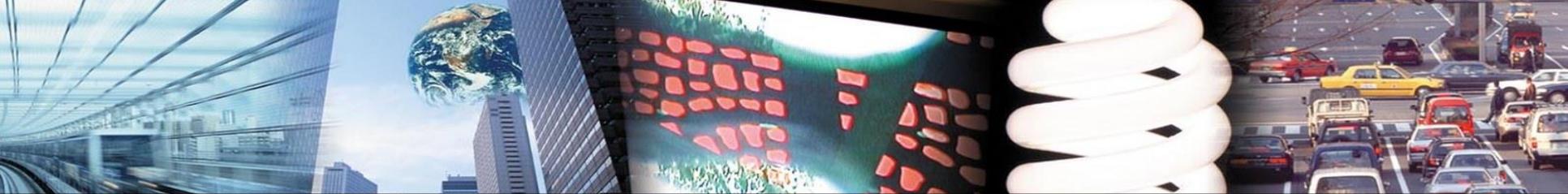


Points to Consider

- ❑ The ***Energy Intensity Analysis*** was added to show the intensity improvements over the current year and not to “impose” on the economies’ contributions to the APEC-wide energy intensity goal (which is based in 2005);
- ❑ Members are encouraged to suggest ways to improve the Overview, submit information on notable energy developments to the EWG in time for the Overview and continue to provide updated information during the review process.

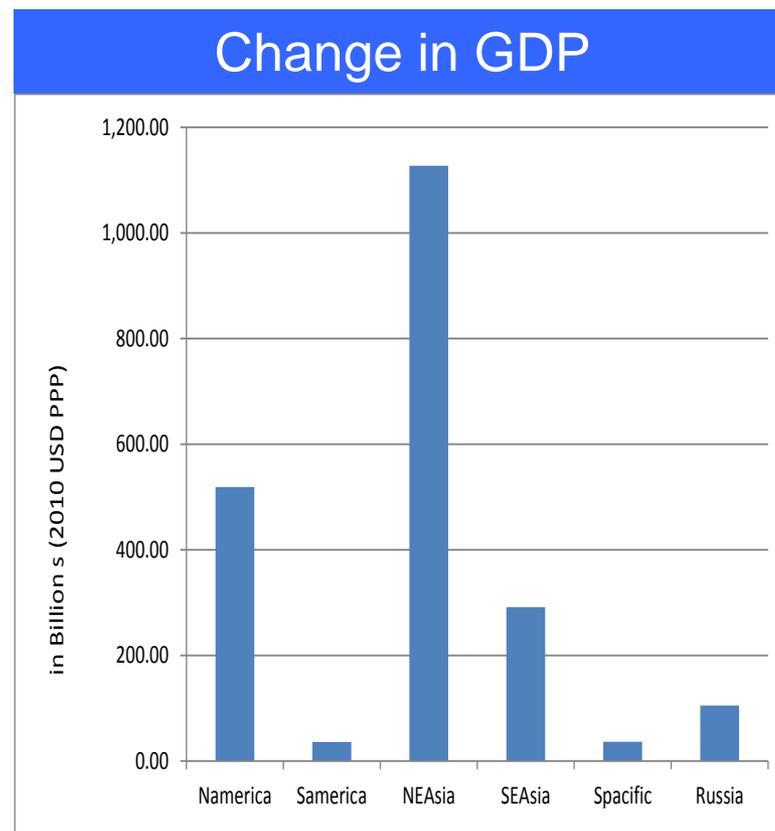


Quick Analysis of the 2014 Overview

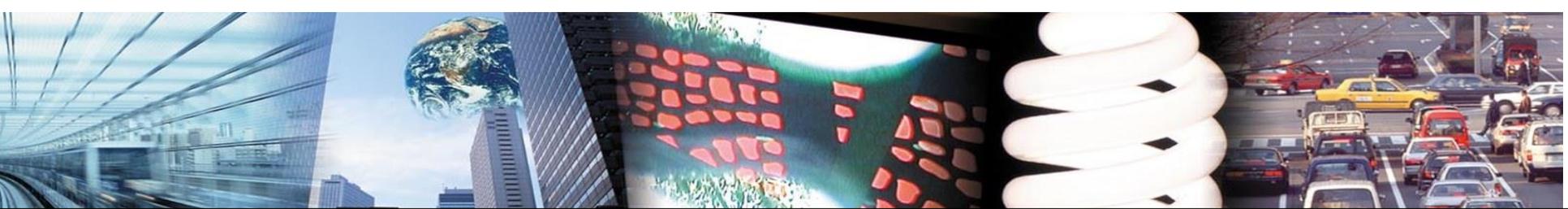


Growth in GDP brought by the robust increase in China at 7.65% from 2011 level

GDP by Region			
	2011	2012	growth
	2010 USD PPP, Billion		%
North America	18,434	18,953	2.82
South America	634	670	5.65
Northeast Asia	20,218	21,346	5.58
Southeast Asia	4,795	5,086	6.08
Oceania	1,031	1,067	3.51
Russia	3,050	3,154	3.44
APEC	30,925	31,906	4.39

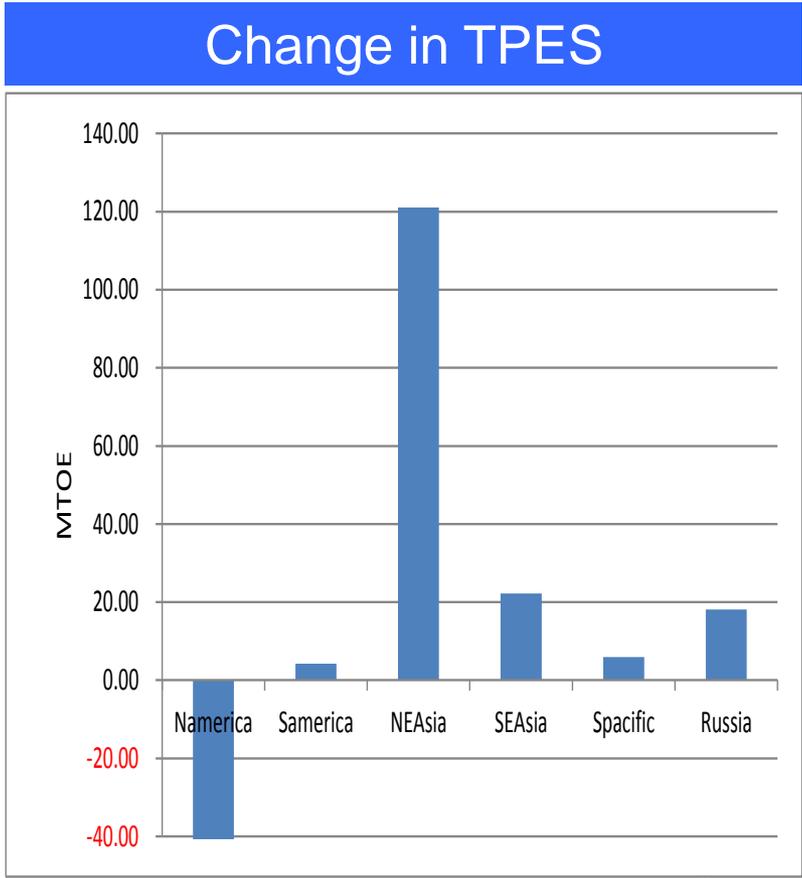


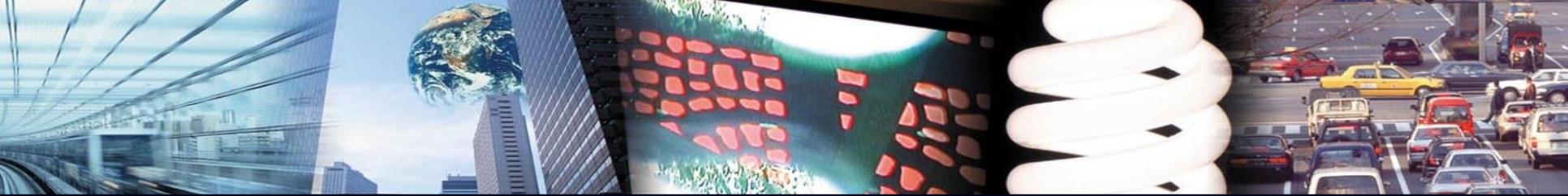
Regional Groupings per APERC suggestion;
Northeast Asia includes China



Decrease in N. America's TPES brought by decrease in USA and Canada; Increase in NE Asia due to China

TPES by Region				
	1990	2010	2012	Growth
	Mtoe			2011 vs 2012 (%)
North America	2,245.9	2,643	2,580.9	-1.8
South America	21.5	48.0	57.5	7.9
Northeast Asia	1,237.9	3,167.3	3,502.6	3.6
Southeast Asia	147.4	451.7	487.8	4.8
South Pacific	99.8	142.9	149.2	4.2
Russia	878.9	702.1	756.3	2.6
APEC	4,634	6,787	7,143	5.24



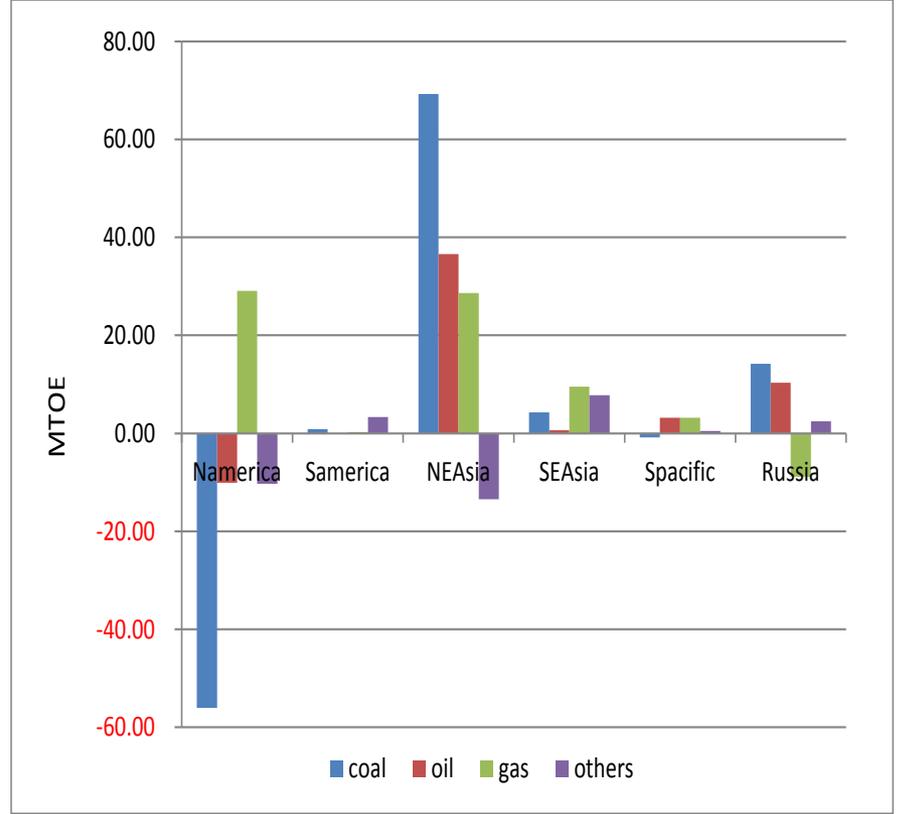


Decrease in TPES is caused by decrease of coal in NA, but coal will be huge in NEA, especially Japan and China

TPES by energy source

	1990	2010	2012	Growth
	Mtoe			2011 vs 2012 (%)
Coal	1,363	2,703	2,927	1.1
Oil	1,751	2,173	2,233	1.9
Natural Gas	998	1,488	1,614	4.0
Other	519	791	760	-1.3

Change in TPES



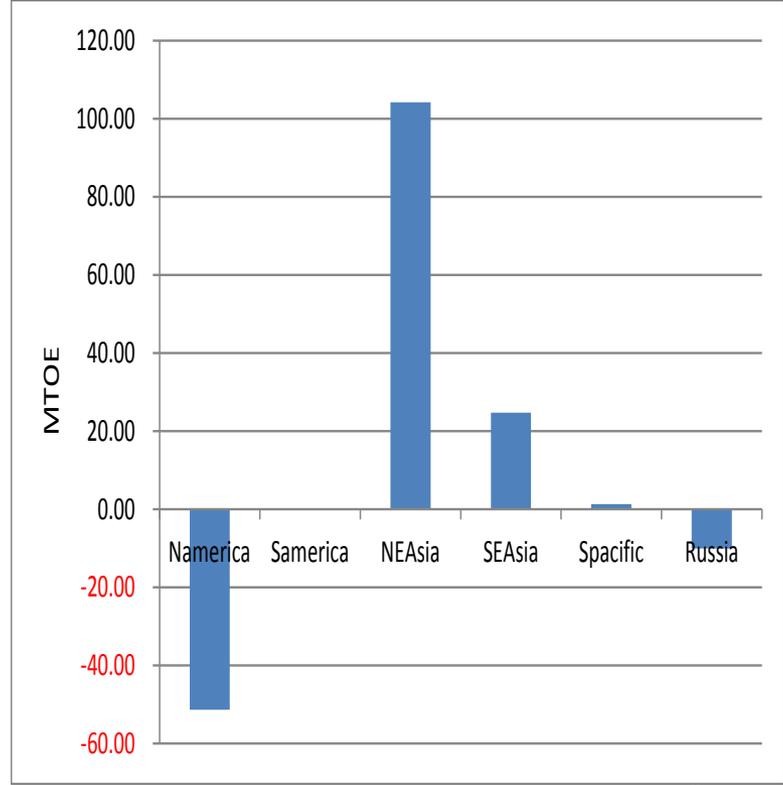


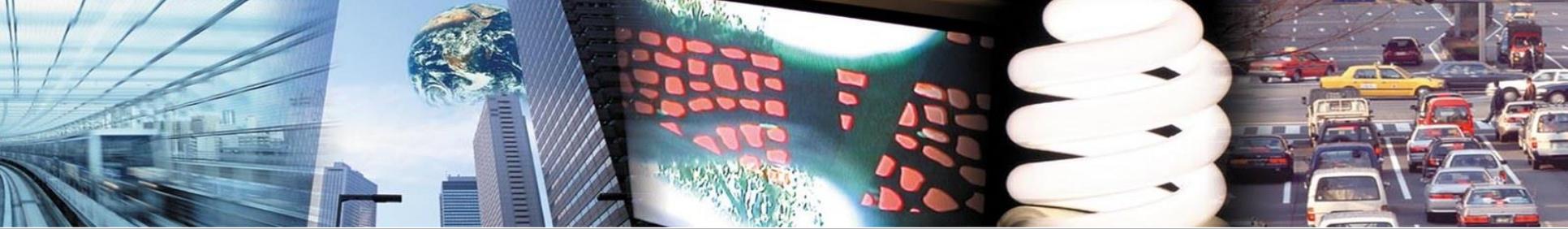
Decrease in TFEC due to USA, while increase is due to China

TFEC by region

	1990	2010	2012	growth
	Mtoe			2011 vs 2012 %
North America	1,535	1,810	1,756	-2.8
South America	17	36	40	0.1
Northeast Asia	897	1,912	2,103	5.2
Southeast Asia	97	286	318	8.4
South Pacific	67	91	93	1.74
Russia	625	441	449	6.60
APEC	3,233	4,385	4,562	4.02

Change in TFEC



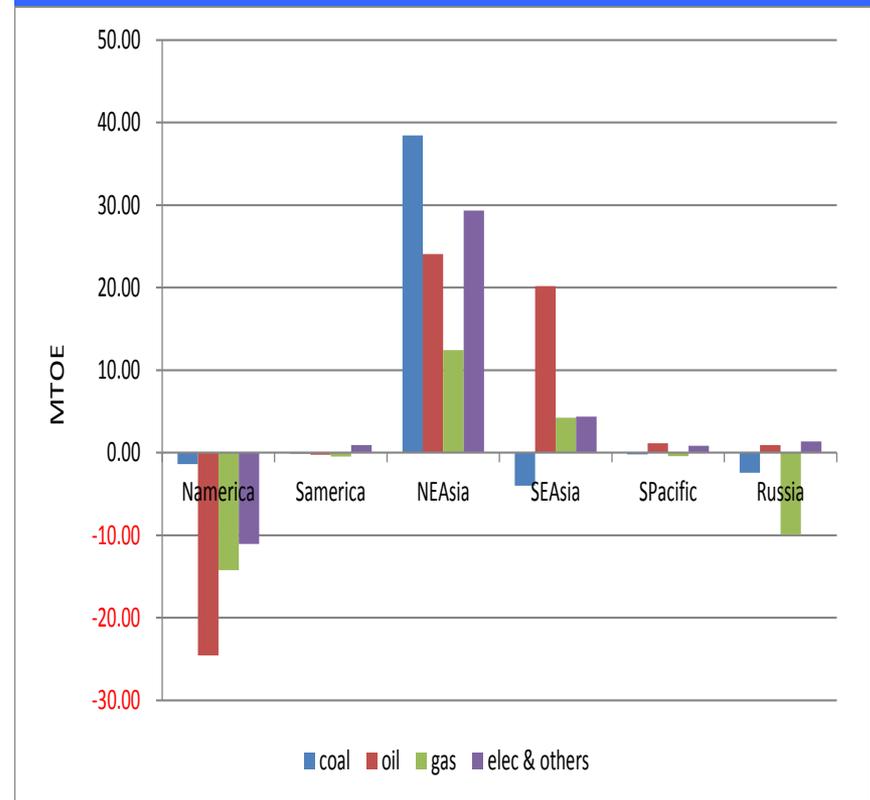


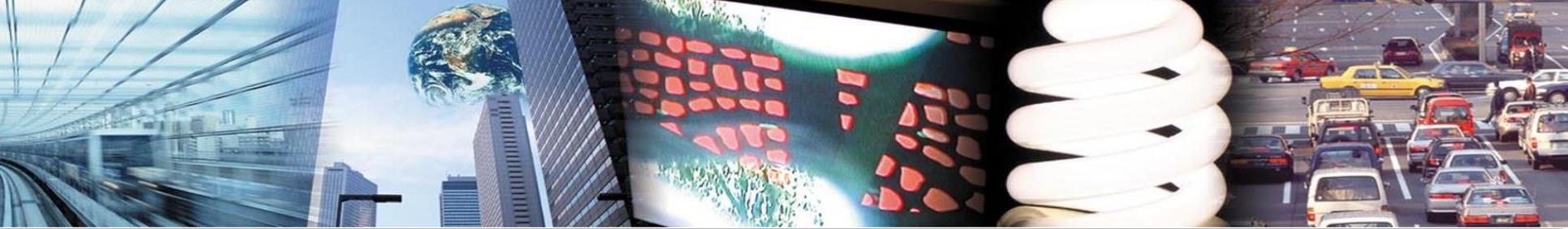
Oil use is significant in SEA; Russia's gas consumption decline

TFEC by energy source

	1990	2010	2012	growth
	Mtoe			2011 vs 2012 %
Coal	519	680	726	4.4
Oil	1,388	1,965	2,007	1.1
Natural Gas	552	684	699	-1.2
Electricity and Other	502	904	973	2.0

Change in TFEC





Expected Timeframe for 2014 APEC Overview

- ❑ First drafts to be completed by end November 2014;
- ❑ Drafts to come back from editors in early December 2014;
- ❑ First circulation to member economies by 2nd week of January 2015;
- ❑ Comments from member economies to be received by end of January 2015;
- ❑ Second round of editing if necessary in 2nd week of February 2015;
- ❑ Receive the final comments (if any) from member economies by end of February 2015, and
- ❑ Publish PDF-version of 2014 APEC Overview hopefully by end of February 2015 or 1st week of March 2015 at the latest, on APERC's website.



Thank You

**APERC looks forward to cooperating with
you in the future**

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