The engine of energy demand growth moves to South Asia

Primary energy demand, 2035 (Mtoe)

China is the main driver of increasing energy demand in the current decade, but India takes over in the 2020s as the principal source of growth.
China becomes the largest consumer of oil by 2030, as OECD oil use drops; demand is concentrated in transport, where diesel use surges by 5.5 mb/d, & petrochemicals.
Government support in China and low gas prices in the United States help gas make inroads, though it stays confined to selected markets.
Petrochemicals production is shifting away from Europe and Japan towards China, the Middle East and to some extent to the United States.
Two chapters to the oil production story

Contribution to global oil production growth

Middle East
- 2013-2025
- 2025-2035

Brazil

United States

Rest of the world

The United States (light tight oil) & Brazil (deepwater) step up until the mid-2020s, but the Middle East is critical to the longer-term oil outlook
An energy boost to the economy?

Share of global export market for energy-intensive goods

The US, together with key emerging economies, increases its export market share for energy-intensive goods, while the EU and Japan see a sharp decline.
Emissions off track in the run-up to the 2015 climate summit in France

Cumulative energy-related CO₂ emissions

Non-OECD countries account for a rising share of emissions, although 2035 per capita levels are only half of OECD
Four measures can stop emissions growth by 2020

Emissions savings in the 4-for-2 °C Scenario, 2020

Partial removal of fossil-fuel subsidies: 12%
Reduce methane releases from upstream oil and gas: 18%
Limit use of inefficient coal power plants: 21%
Implement selected energy efficiency policies: 49%

Source: WEO Special Report 2013

Four measures can stop the growth in emissions by 2020 at no net economic cost, reducing emissions by 3.1 Gt, 80% of the savings required for a 2 °C path
China, then India, drive the growing dominance of Asia in global energy demand & trade

Technology is opening up new oil resources, but the Middle East remains central to the longer-term outlook

Regional price gaps & concerns over competitiveness are here to stay, but there are ways to react – with efficiency first in line

Four measures can stop emissions growth by 2020 and keep the 2°C target alive, without harming economic growth