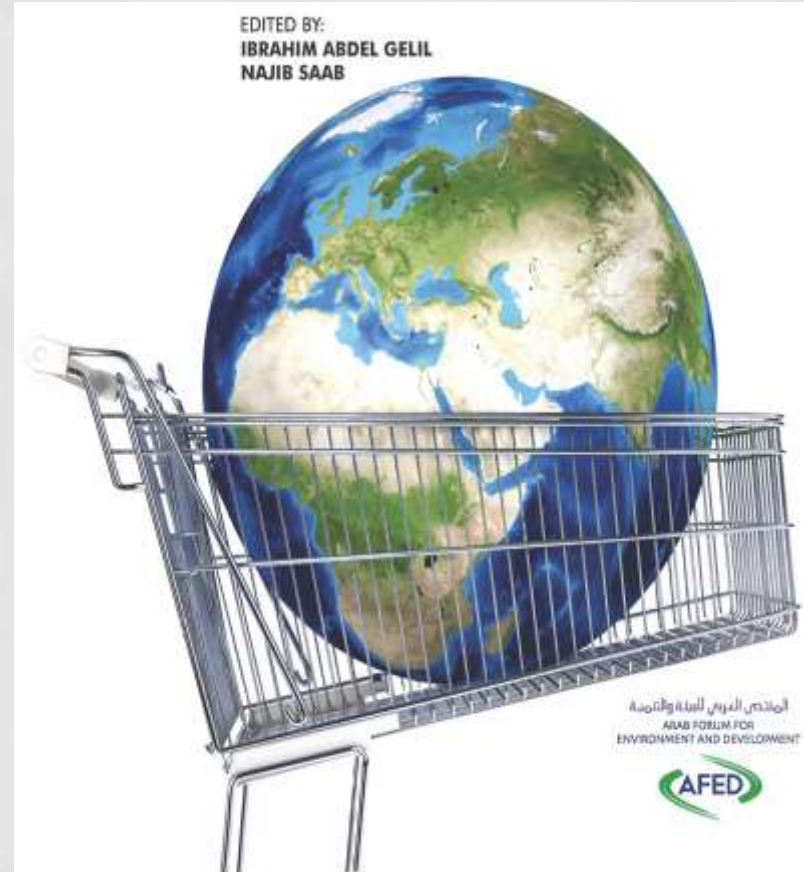


AFED 2015 Report

Energy Profile of the Arab Countries

Ibrahim Abdel Gelil

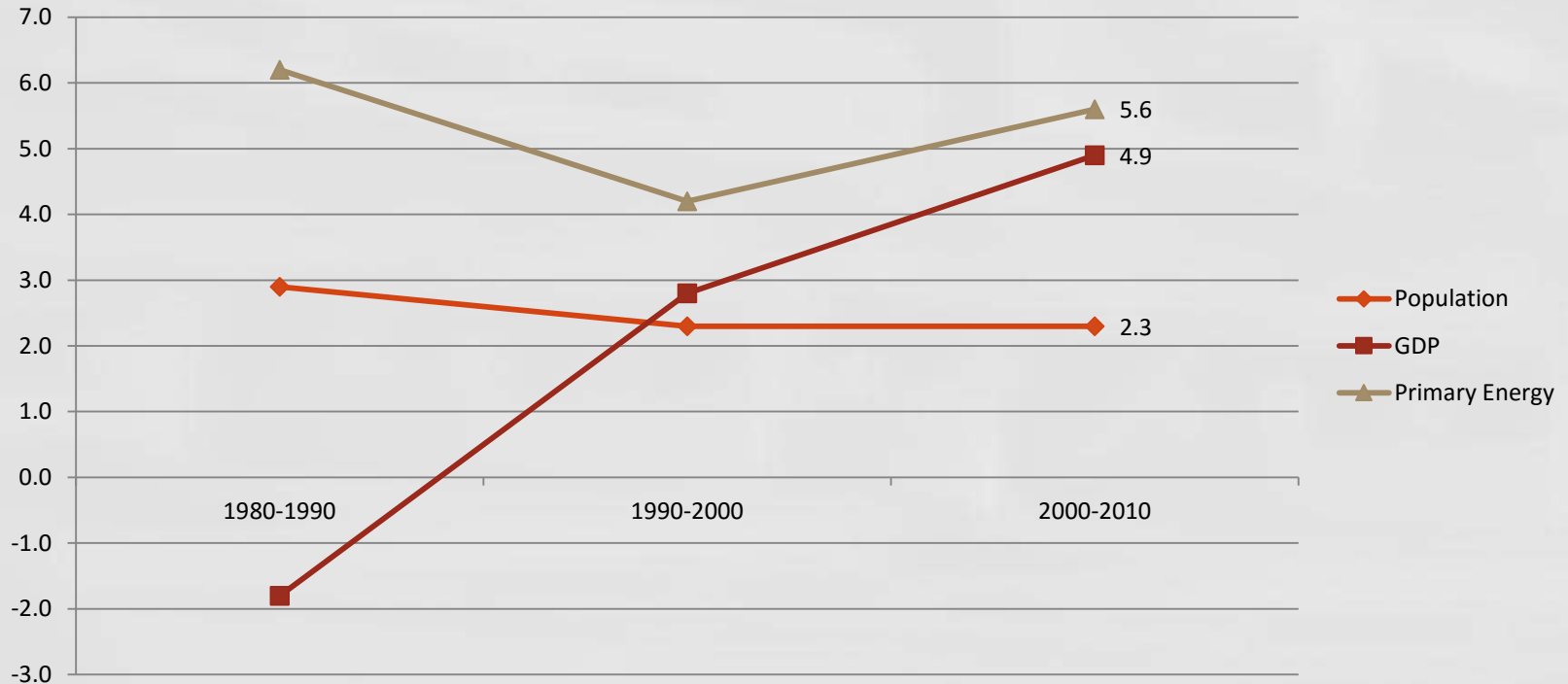
AFED 2015 Conference
16-17 November, 2015
Beirut



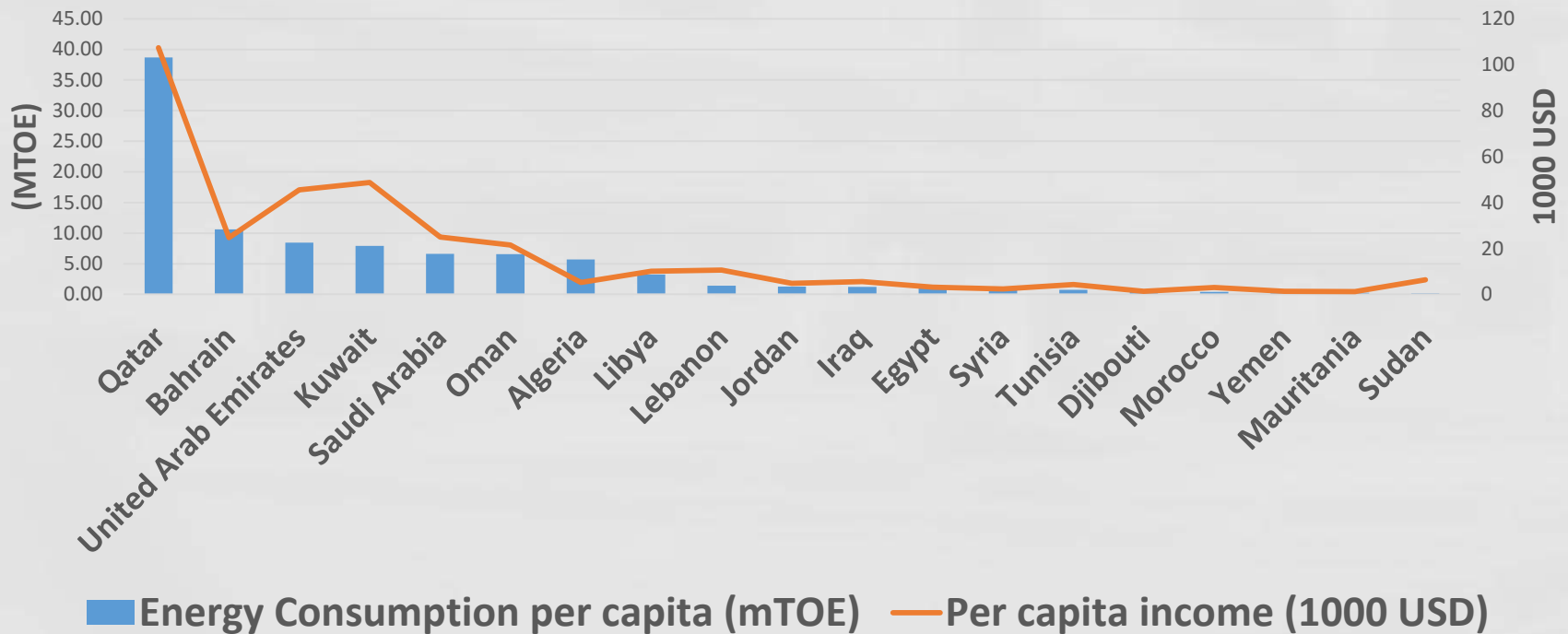
Outline

- Trends in consumption
- Consumption Patterns
- Energy Pricing Policies
- Energy Efficiency
- Renewable Energy
- Conclusions

Growth of Energy has been always higher than that of population and GDP



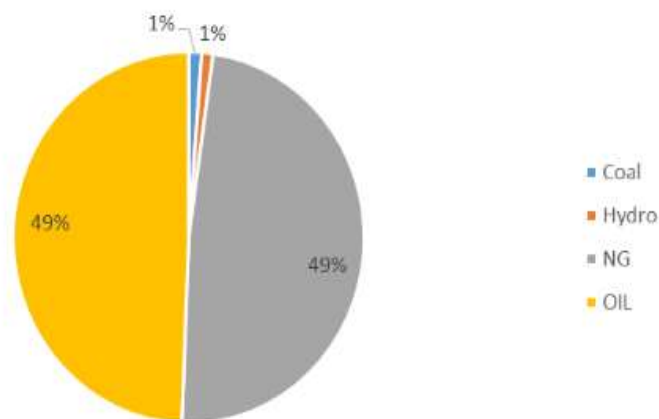
Per capita income is driving energy consumption. Disparities go in parallel



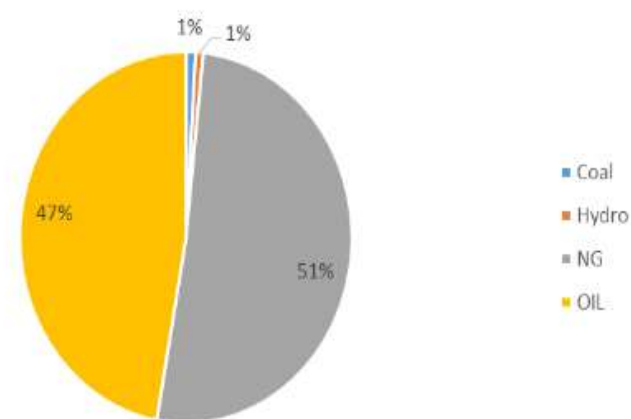
Primary Energy Consumption is dominated by Oil and Gas

Slight shift to more Gas

Energy Consumption by source (2005)

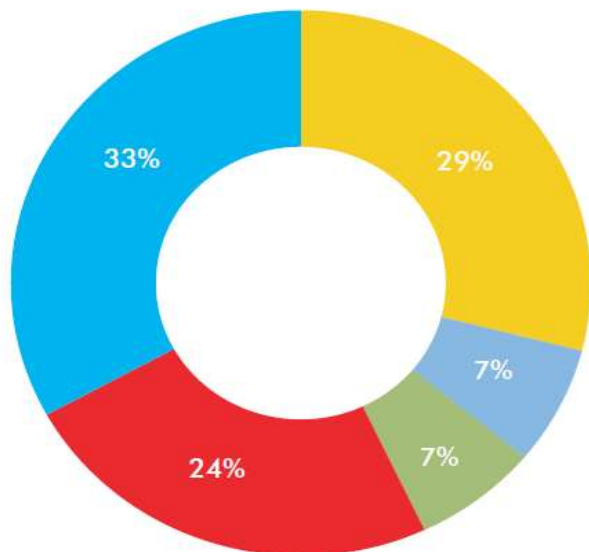


Energy Consumption by Source (2013)



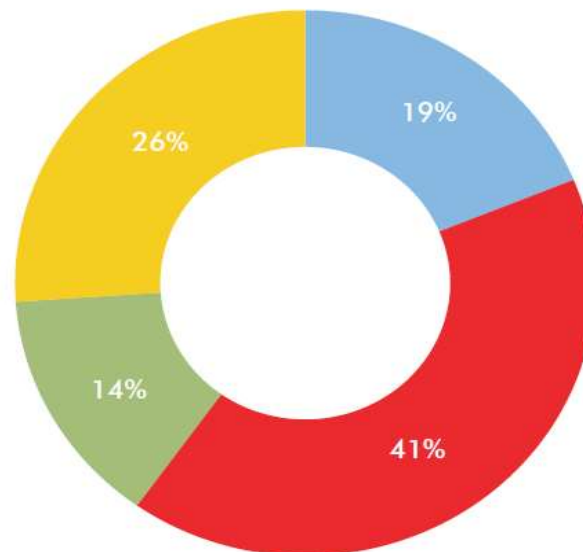
Sectors' Contribution to Consumption

Final energy consumption
in 13 Arab countries in 2009



Industry Other Tertiary Residential Transport

Electricity consumption
in 18 Arab countries in 2011



Other Residential Commercial Industry

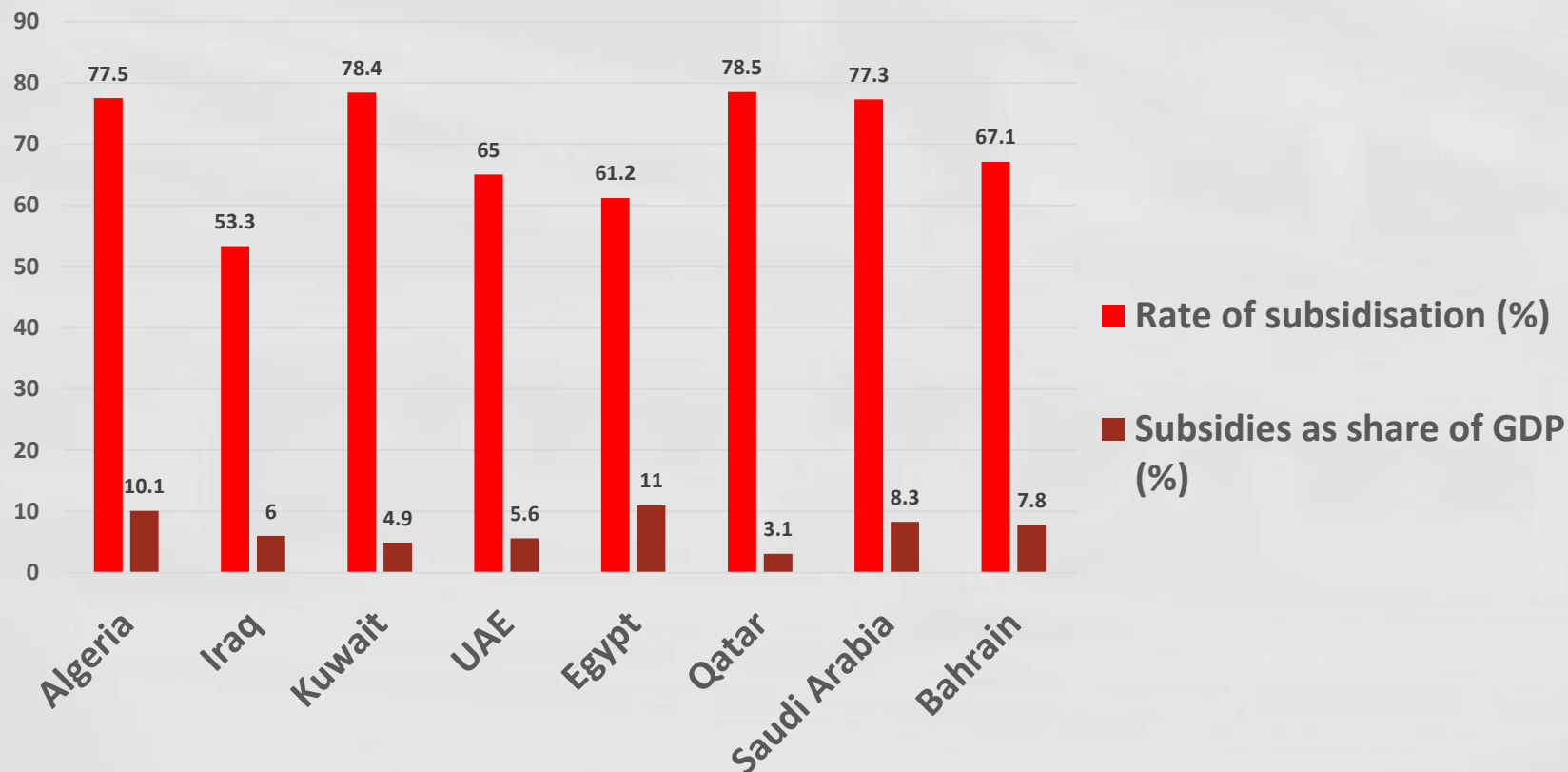
Source: RCREEE & Plan Bleu study (2012); AUE (2011)

Source: RCREEE

Pricing Policies

- Subsidies is part of the social contract (political stability)
- More subsidies in resource-rich countries (GCC, Egypt, Algeria, and Syria).
- Less Price distortions in resource-poor countries (Lebanon, Jordan, Morocco, and Palestine)
- Phasing out subsidies while alleviating its social impacts:
 - Egypt announced a five-year plan to phase out electricity subsidies.
 - Jordan eliminated fuel subsidy in 2004 over four years.
 - Morocco phased out subsidies, generating tax
 - UAE removed subsidies of transportation fuels

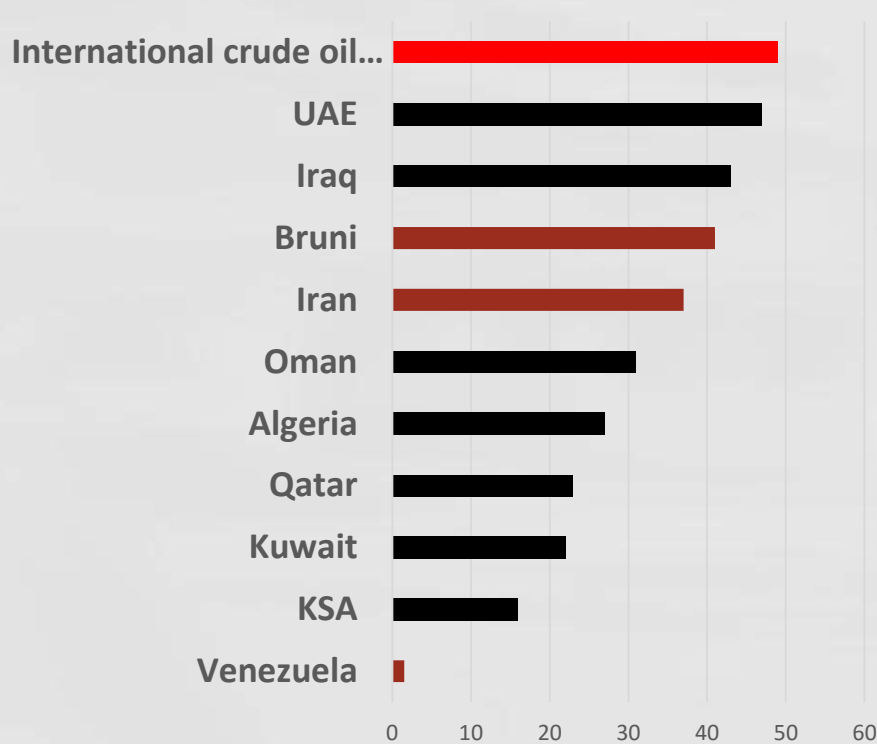
Fossil Fuel subsidies



Source: IEA (2014)

Prices of Transport Fuels

Gasoline prices (US Cents/litre)



Diesel Prices (US Cents/litre)



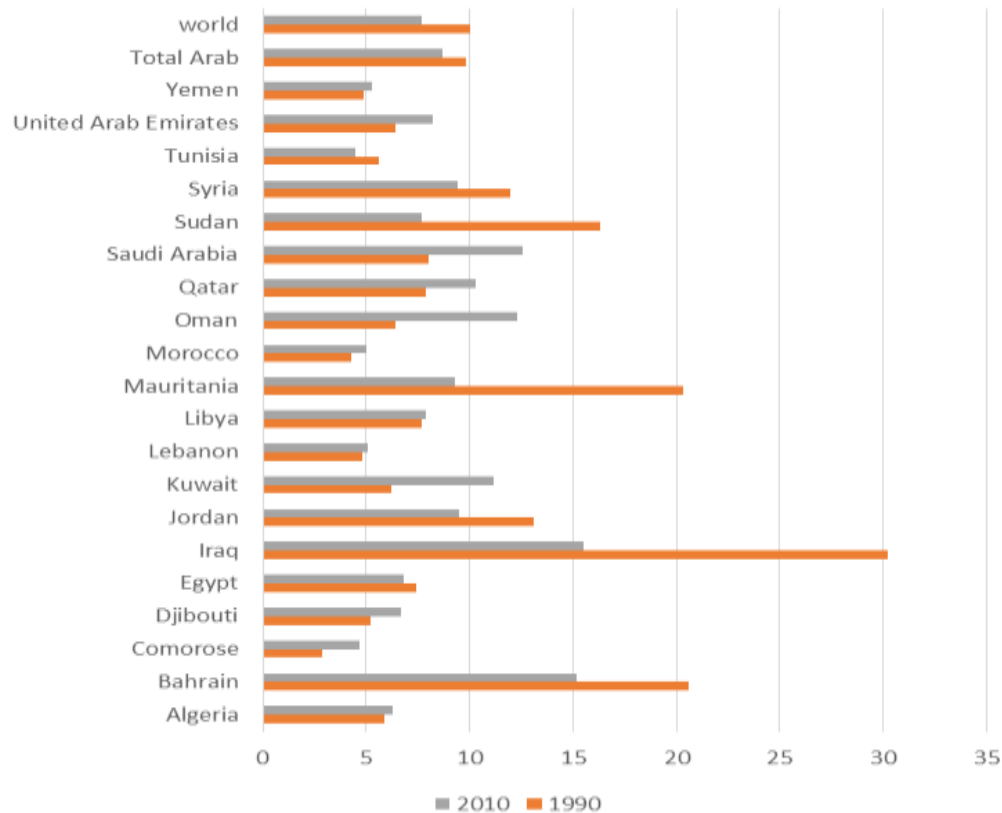
Source: GIZ (2015)

The least energy efficient emerging region



Energy Intensity

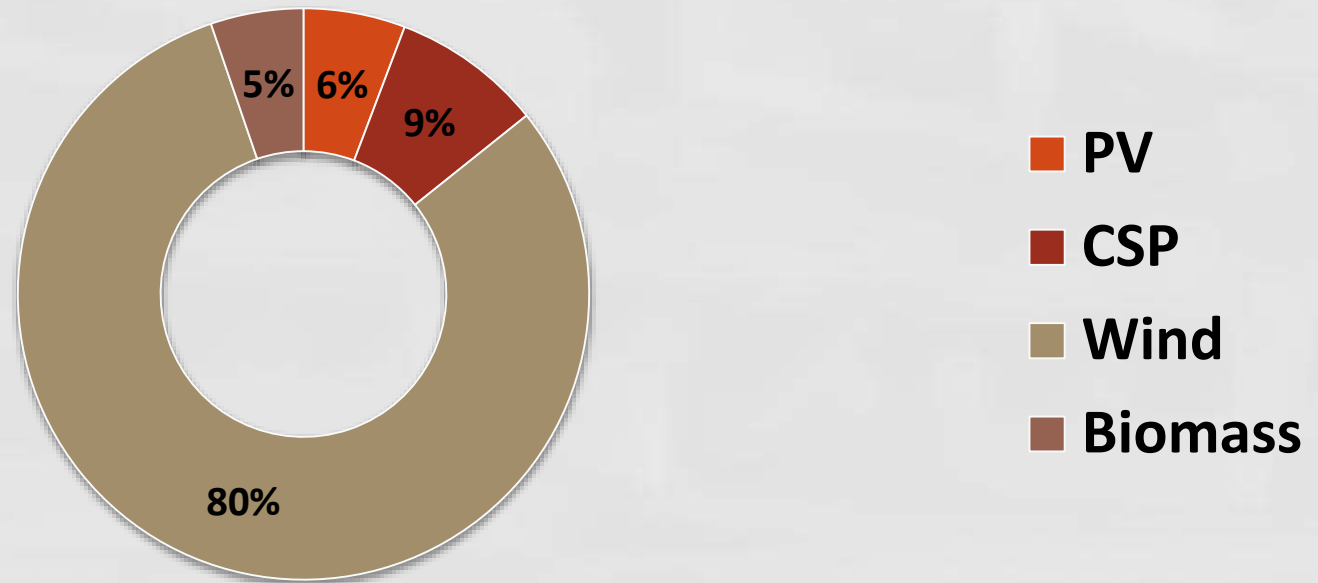
Fig. 3: Energy Intensity (MJ/\$2005 PPP)



**Average EI is
Higher than the
world average**

Source: SE4ALL

Installed Capacity of RE is dominated by Wind



RE Policies

Policies	Number of Countries
RE Target	12
RE strategy	11
FIT	5
Net metering	8
Tax reduction	8
Public investment	7
tendering	11
RE fund	7

Conclusions

- Driving forces for demand are different across countries
- Consumption patterns varies accordingly.
- Consumption is dominated by oil and gas
- Building sector is the major electricity consumer
- Subsidies promote wasteful over consumption.
- EI is higher than world average
- RE is dominated by Wind
- RE policy framework still in early stages
- A need to remove barriers to EE and RE

Thank You

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