



**IEA/ASEAN Workshop**

**“Oil Security and Emergency Preparedness”**

**1-2 September 2003**

**Global Oil Outlook and the  
Longer Term Security Challenges**

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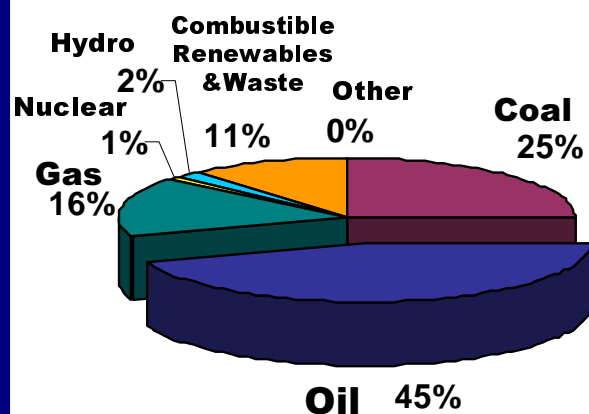


- **Why Energy Security?**
  - ◆ **Vital to Sustain Social and Economic Activities**
  - ◆ **3E (Energy Security, Environmental Protection and Economic Growth)**
  
- **Why Oil Security?**
  - ◆ **The Largest commodity traded world wide**
  - ◆ **Oil remains the dominant fuel**
  
- **Why Emergency Preparedness?**
  - ◆ **Past experiences**
  
- **Who should do what?**



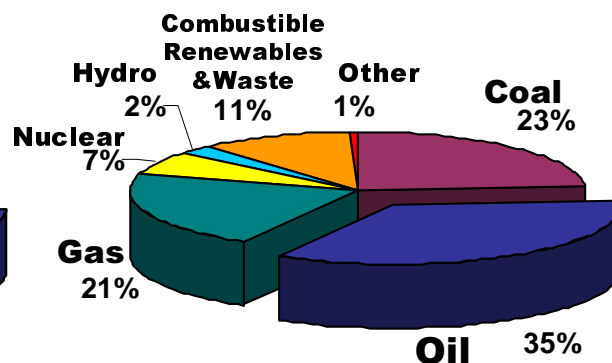
# Fuel Shares of Total Primary Energy Supply

**1973**



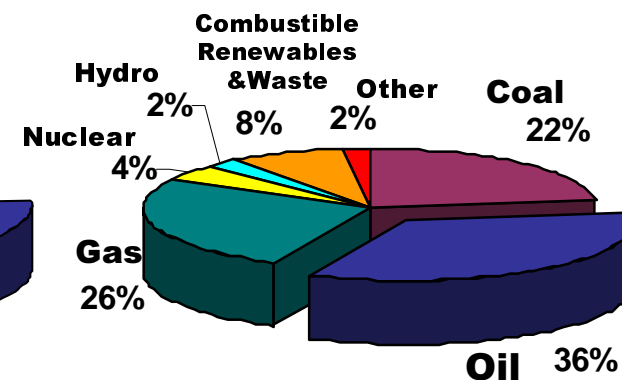
6,040 Mtoe

**2000**



9,963 Mtoe

**2030**



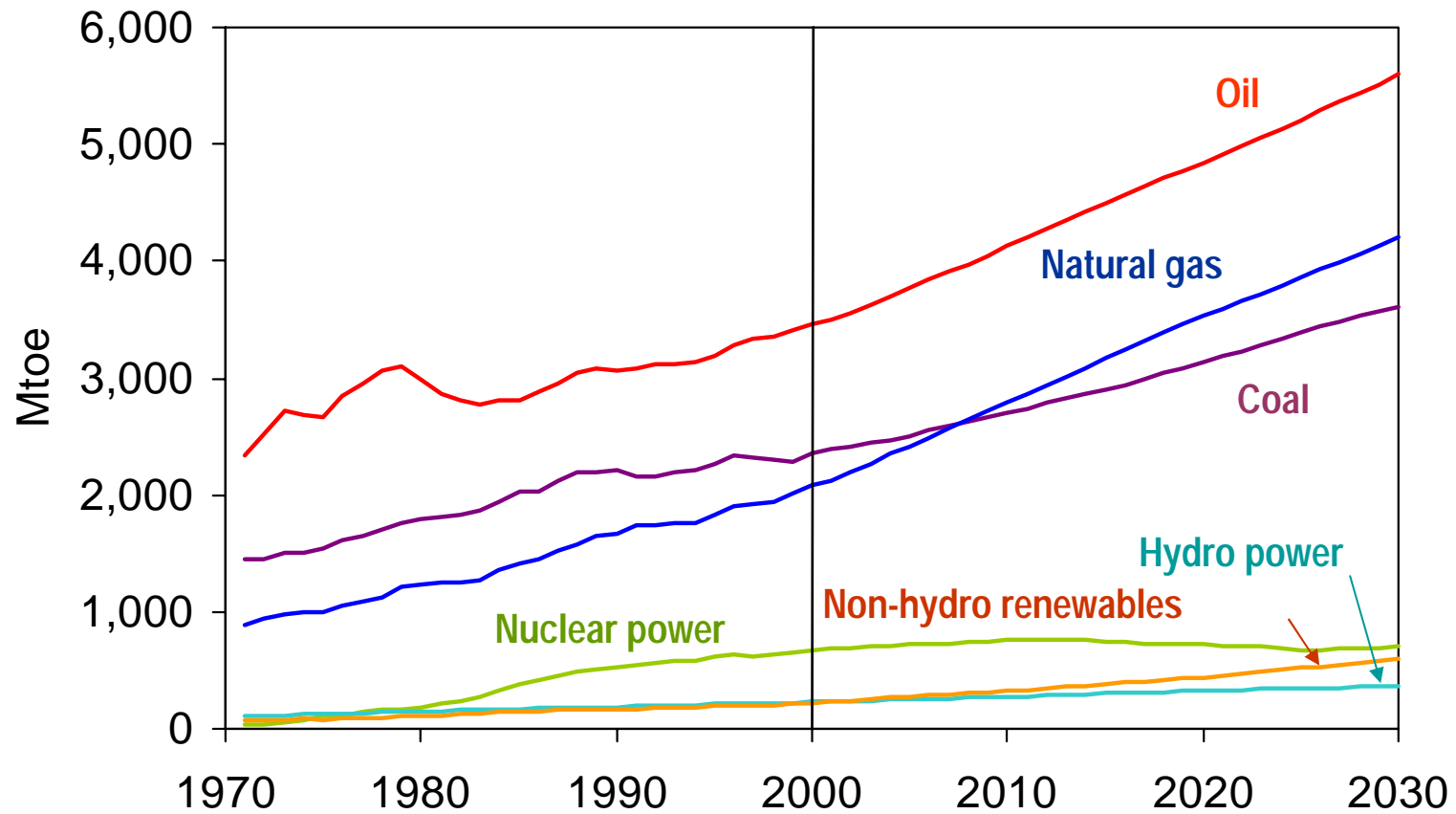
16,128 Mtoe

\*Exclude international marine bunkers and electricity trade

\*\*Other includes geothermal, solar, wind, heat, etc.



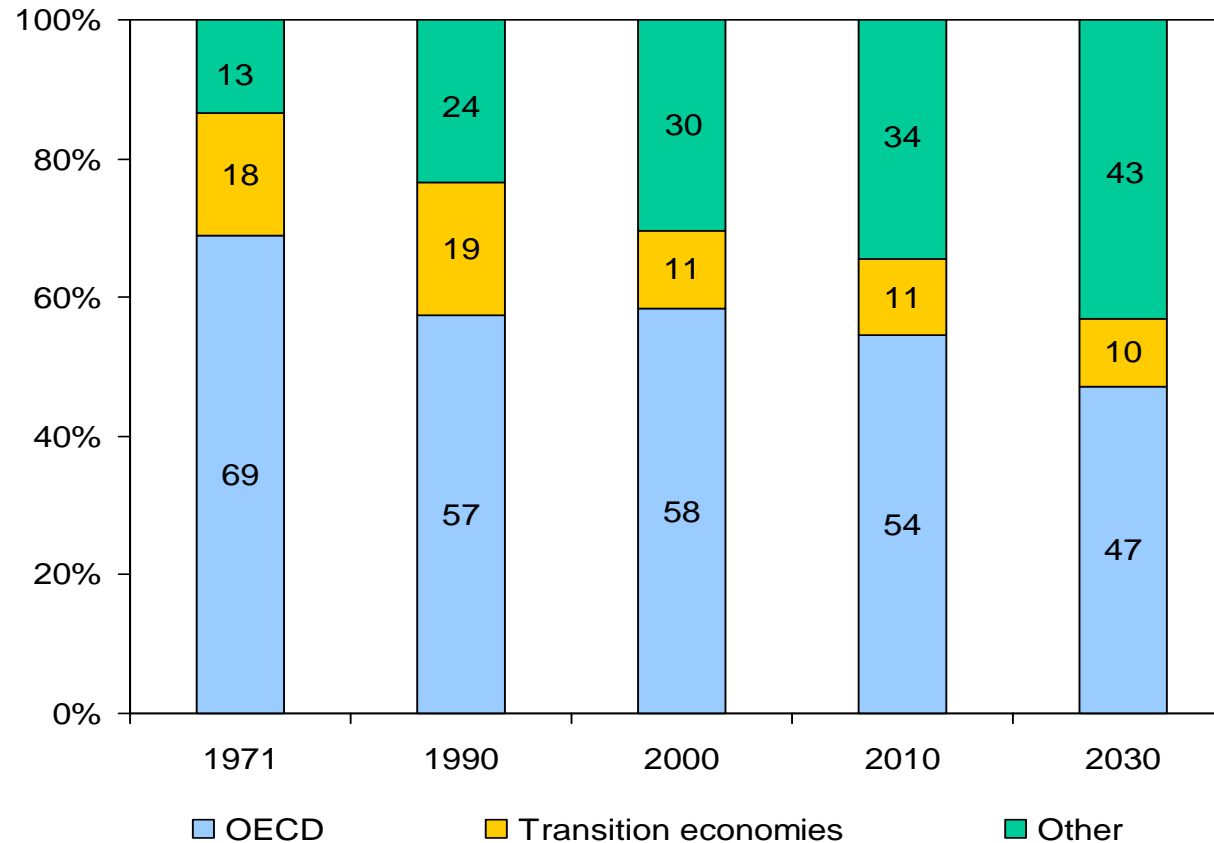
# World Primary Energy Trend



**Gas grows fastest in absolute terms & non-hydro renewables fastest in % terms, but oil remains the dominant fuel in 2030**



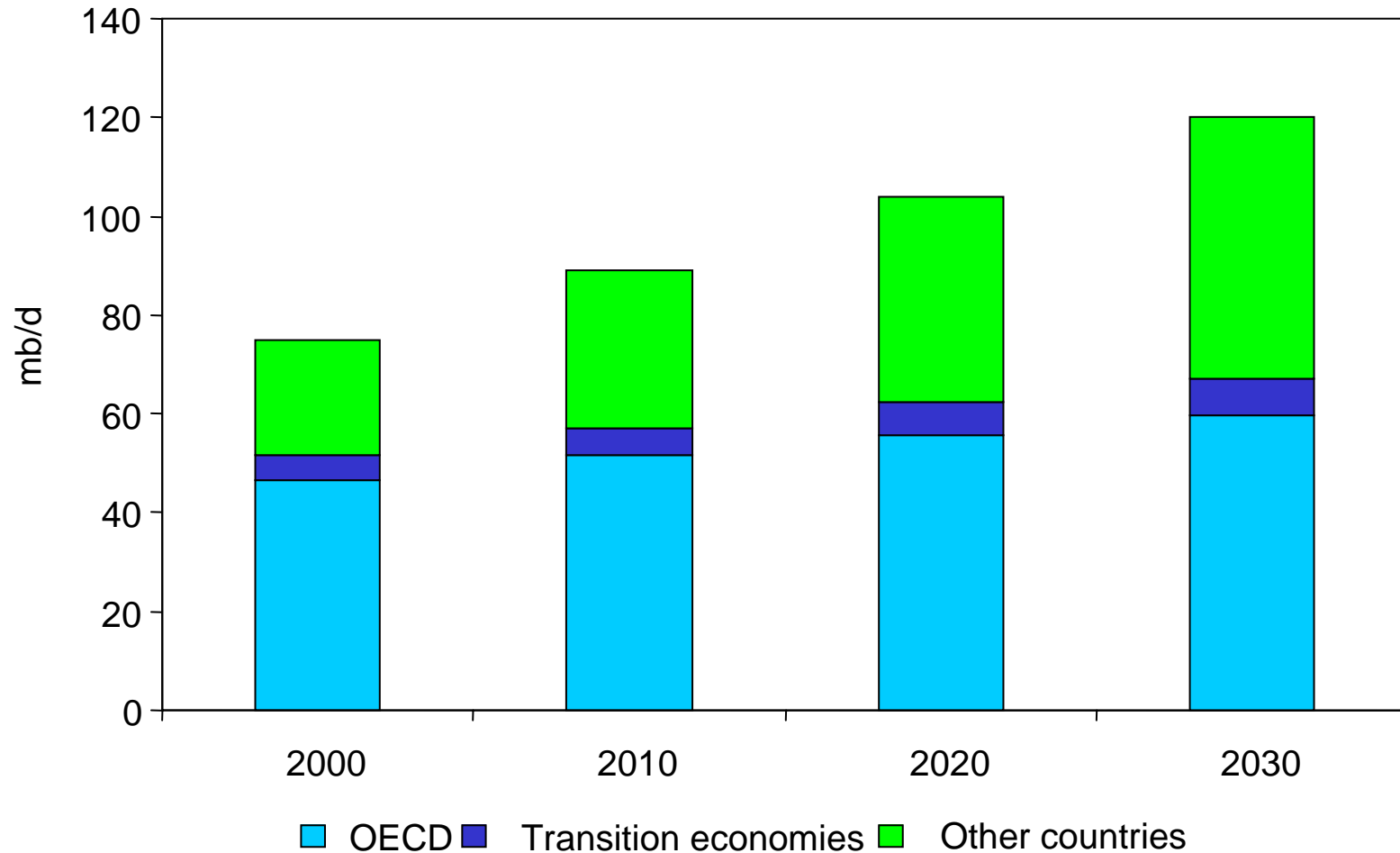
# Increase in Demand Driven by Non-OECD Countries



**62% of the increase in world demand between 2000 and 2030 comes from developing countries, especially in Asia**

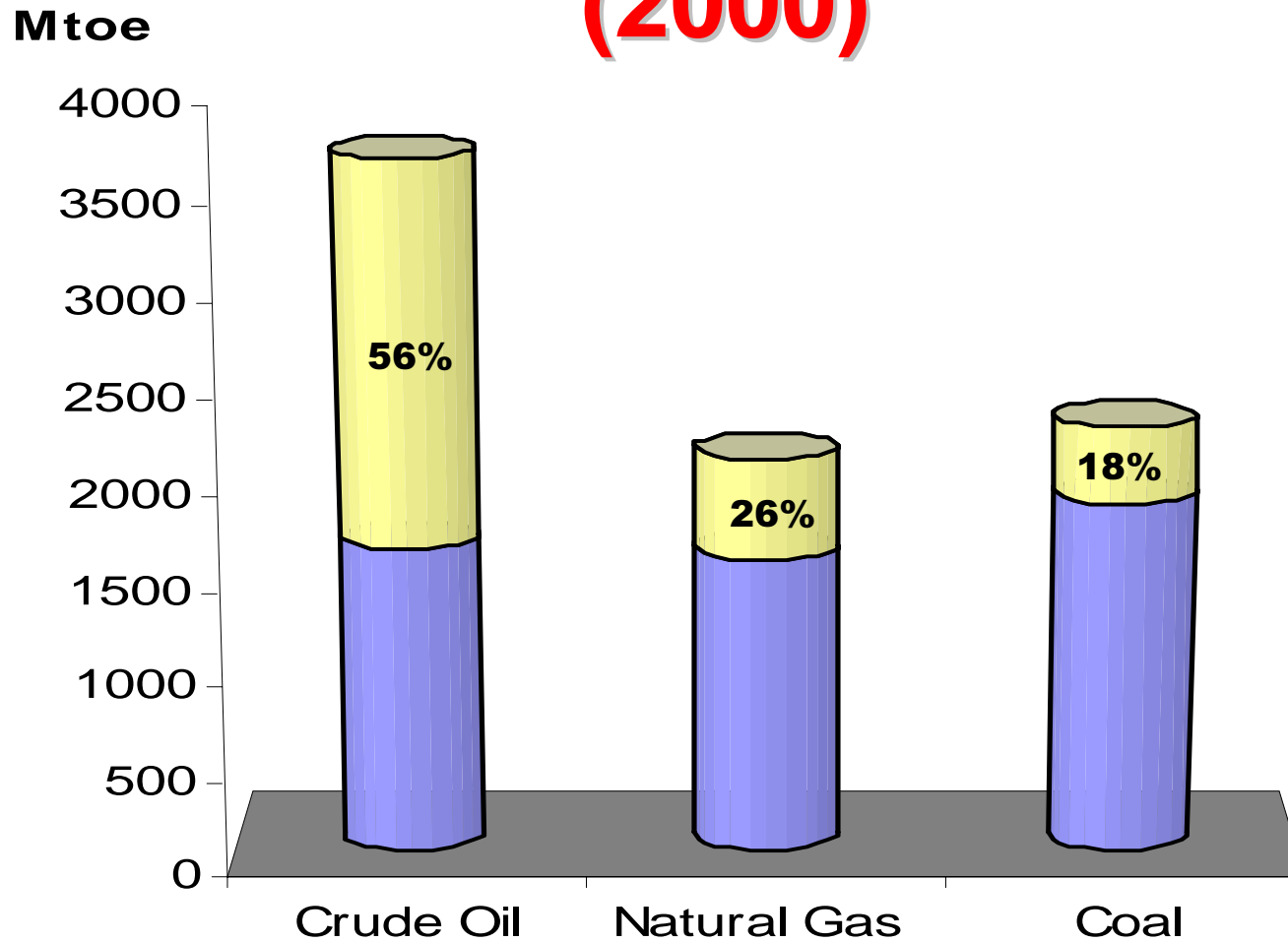


# Non-OECD Countries Drive Growth in Oil Demand



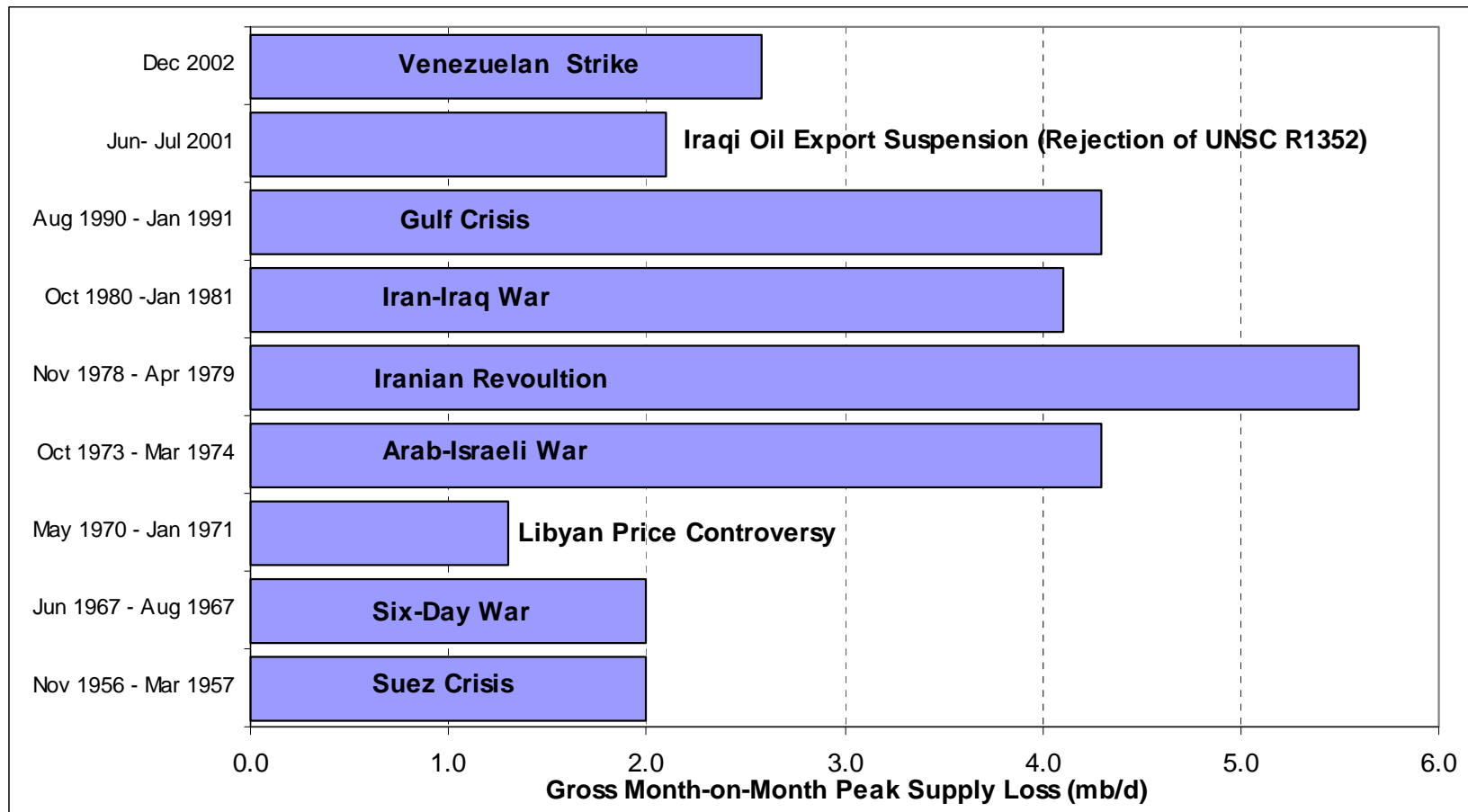


# Trade Share in Production (2000)





# Oil Supply Disruptions





# The Challenges We Face:

**Energy Security**

**Investment**

**Technology**

**Environment**

**Affordability**