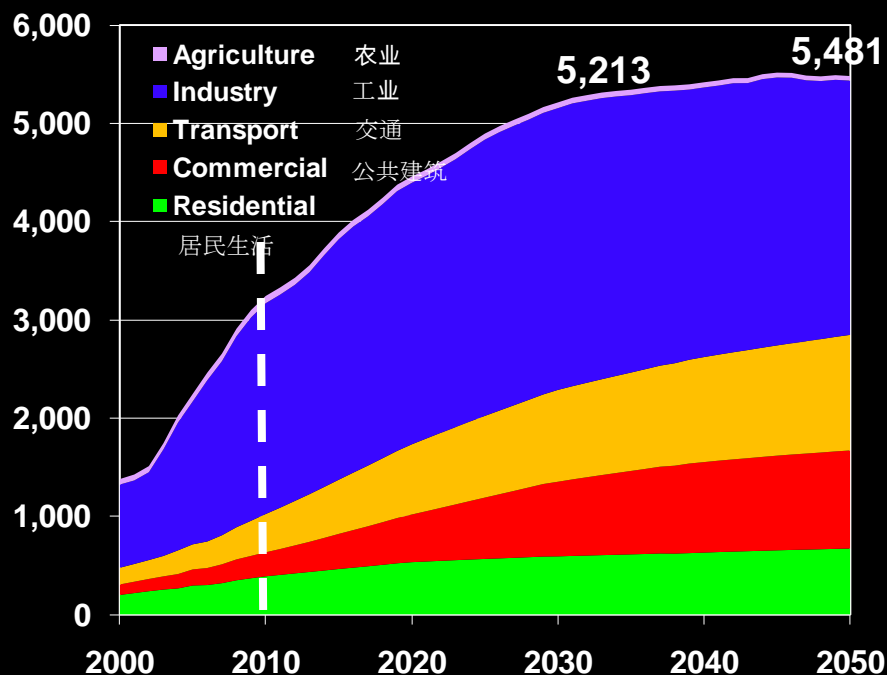


各行业一次能源消耗

Total Primary Energy Use by Sector

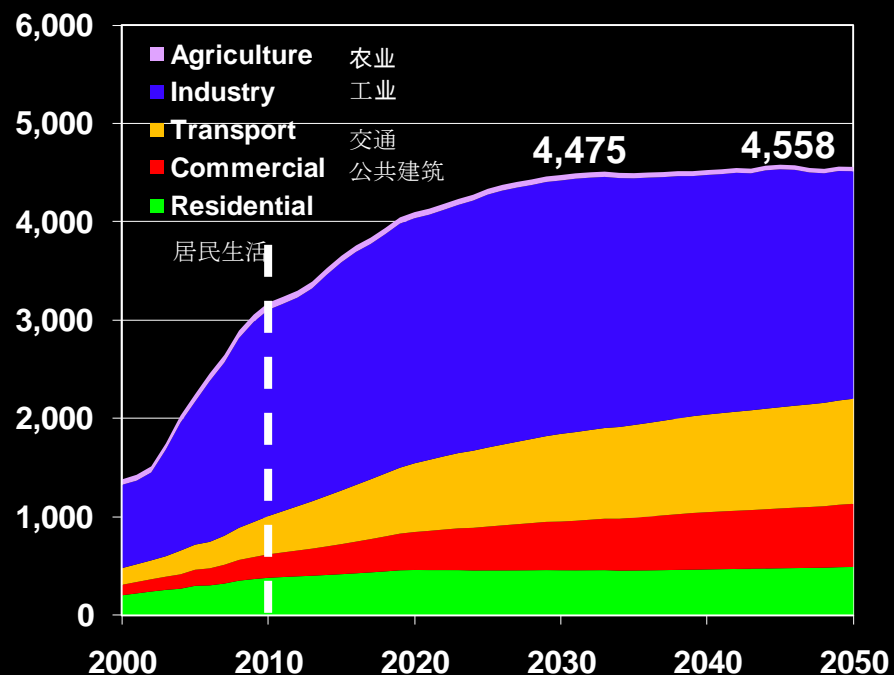
持续改进

Continued Improvement



加速改进

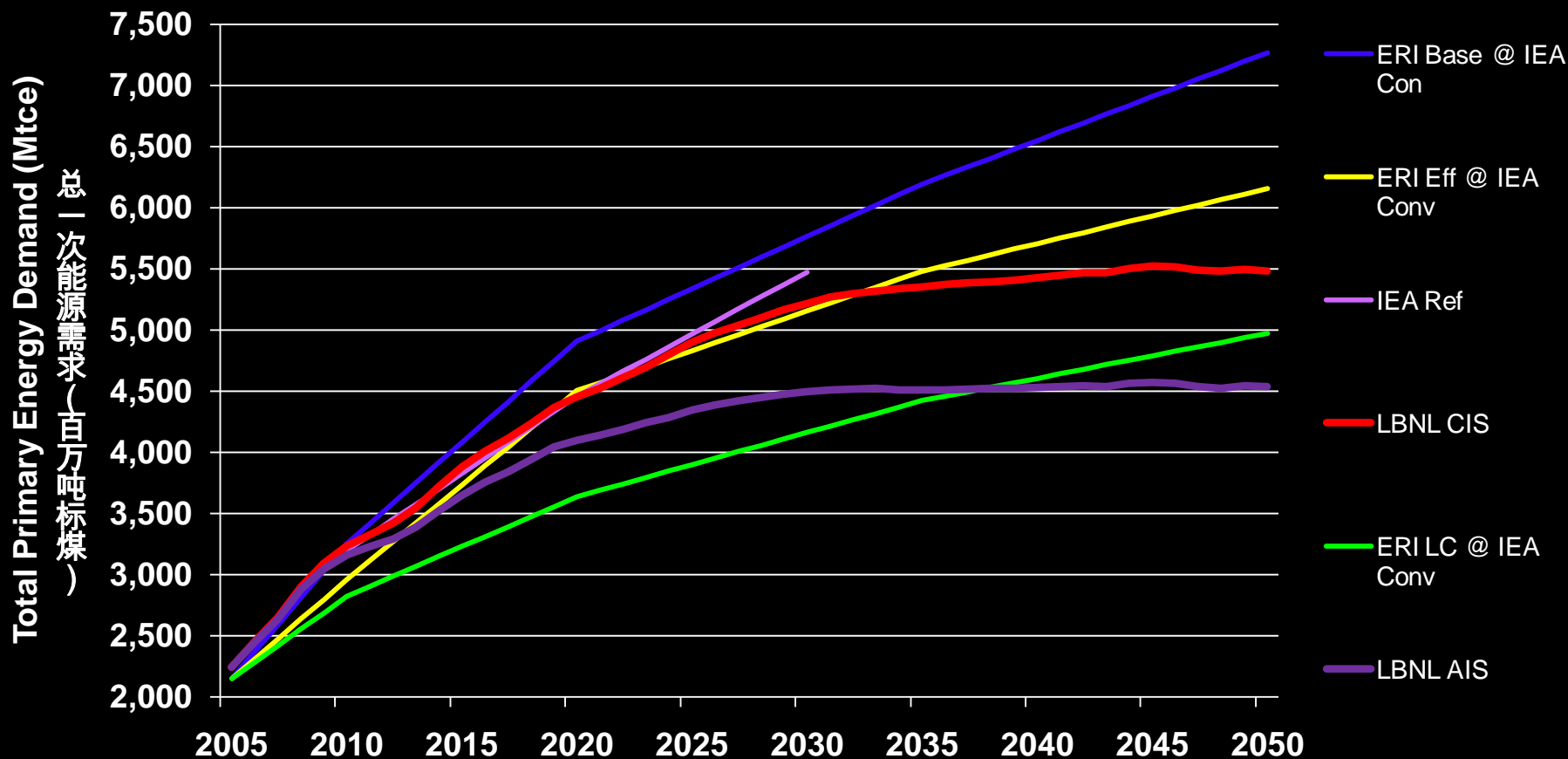
Accelerated Improvement



一次能源消耗 (百万吨标煤)
Primary Energy Use (Mtce)

总一次能源消耗：与其他主流的预测分析比较

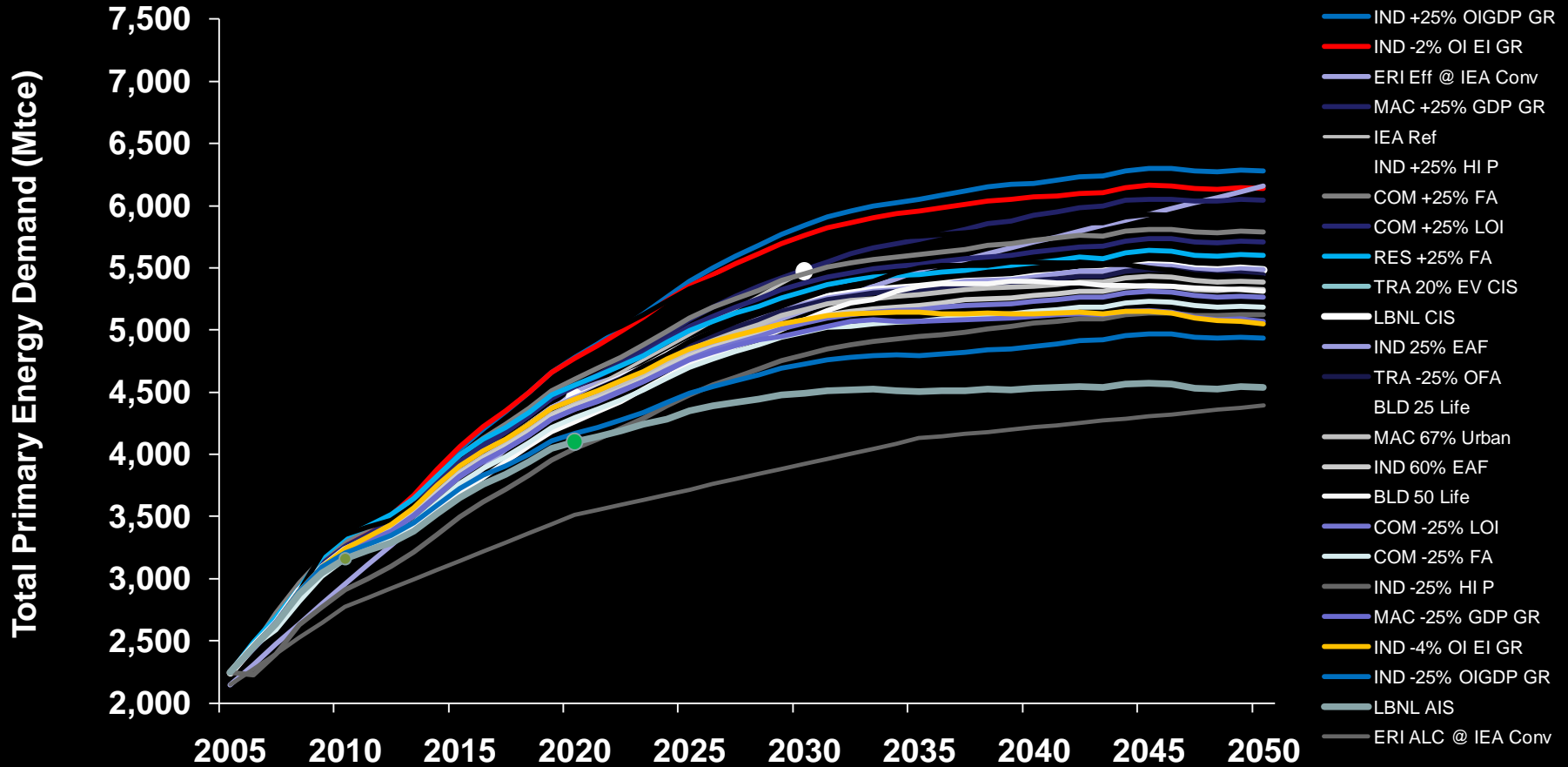
Total Primary Energy Use: Comparison with Other Mainstream Analyses



Note: Y-axis not scaled to 0.

ERI: China Energy Research Institute; IEA Conv: IEA convention for converting primary electricity; IND: Industry; OIGDP: Other Industry GDP; GR: Growth Rate; MAC: Macroeconomic; OI EI: Other Industry Energy Intensity; HI P: Heavy Industrial Production; COM: Commercial; FA: Floor Area; LOI: Lighting & Other Intensity; LC: Low Carbon; RES: Residential; EAF: Electric Arc Furnace; TRA: Transport; EV: Electric Vehicles; CIS: Continued Improvement Scenario; OFA: Ocean Freight Activity; ALC: Accelerated Low Carbon; AIS: Accelerated Improvement Scenario

Total Primary Energy Use Sensitivity Analysis



Note: Y-axis not scaled to 0.

ERI: China Energy Research Institute; IEA Conv: IEA convention for converting primary electricity; IND: Industry; OIGDP: Other Industry GDP; GR: Growth Rate; MAC: Macroeconomic; OI EI: Other Industry Energy Intensity; HI P: Heavy Industrial Production; COM: Commercial; FA: Floor Area; LOI: Lighting & Other Intensity; LC: Low Carbon; RES: Residential; EAF: Electric Arc Furnace; TRA: Transport; EV: Electric Vehicles; CIS: Continued Improvement Scenario; OFA: Ocean Freight Activity; ALC: Accelerated Low Carbon; AIS: Accelerated Improvement Scenario

结论 | Conclusions I

- 通常认为中国的二氧化碳排放将会在本世纪内持续增长，并且会成为世界最主要的排放国。我们认为不太可能出现这种情况，因为：
 - 电器、居民和商用建筑面积、公路、铁路、化肥使用等都将会在2030年的时间范围达到**饱和**
 - **城市化率**将会在2030年或2035年之后接近峰值
 - 高耗能工业的**出口**将会降低
 - **人口**增长趋缓
- It is a common belief that China's CO₂ emissions will continue to grow throughout this century and will dominate the world's emissions. We believe this is not likely to be the case because:
 - Appliances, residential and commercial floor area, roadways, railways, fertilizer use, etc. will **saturate** in the 2030 time frame
 - **Urbanization** growth rate peaks by 2030 or 2035
 - **Exports** of energy-intensive industry will decline
 - Low **population** growth