



INNOVATING TO CAPTURE MORE EFFICIENCY, FASTER

G20 ENERGY EFFICIENCY FORUM

Jon Creyts | 6 September 2016 | Beijing



Transforming global energy use to create a clean, prosperous, and secure low-carbon future.

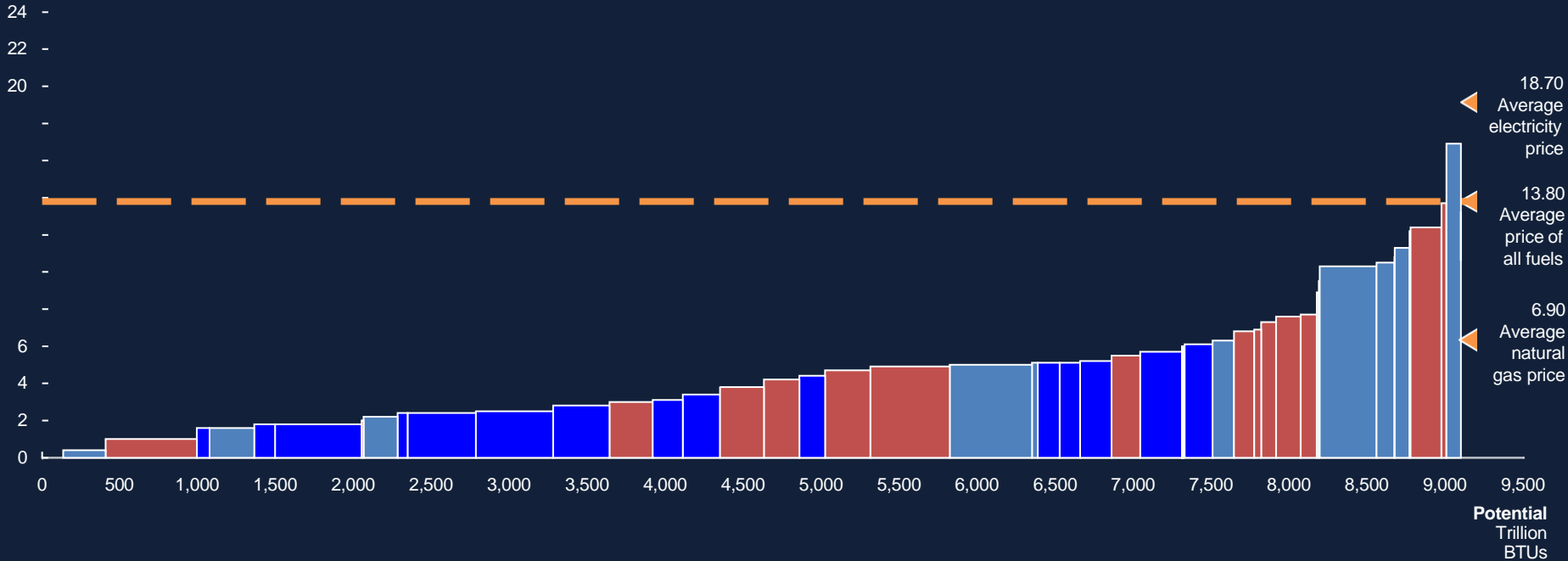


**ENERGY
EFFICIENCY IS
WORTH
CAPTURING**

ENERGY EFFICIENCY IS A COMPELLING RESOURCE

US Buildings Energy Efficiency Potential, 2020

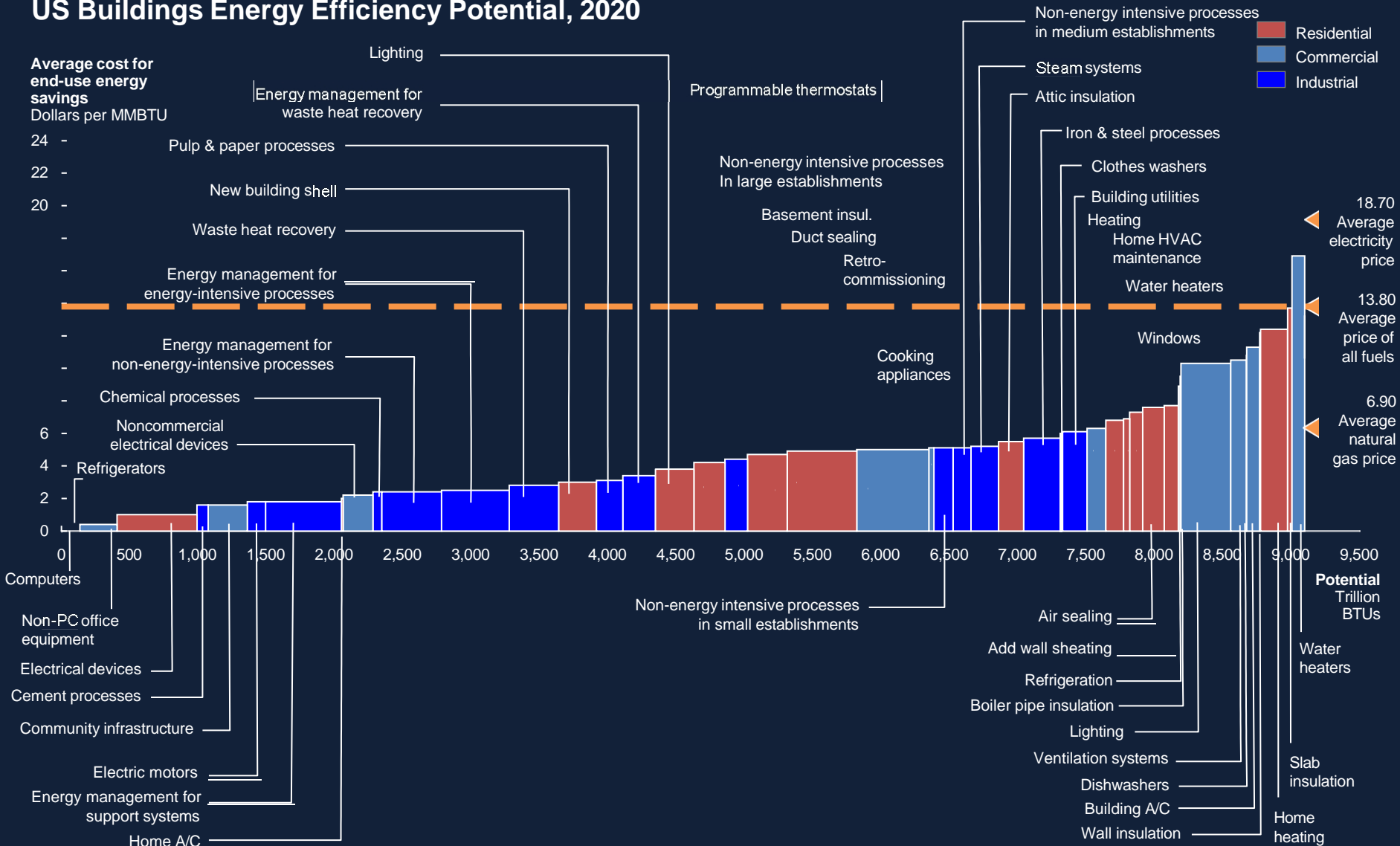
Average cost for end-use energy savings
Dollars per MMBTU



- 23% of total projected energy use could be saved economically
- 1.1 gigatons of carbon dioxide emissions averted
- \$520 billion investment for \$1.2 trillion savings
- Similar opportunity exists in every country globally

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SOURCE: Creyts et al, McKinsey, 2009.



ENERGY EFFICIENCY HAS OTHER DESIRABLE ATTRIBUTES, TOO

- Local jobs
- No emissions
- Improved energy security
- De-risked operating economics
- Resource preservation

BUT ENERGY EFFICIENCY ALSO HAS FUNDAMENTAL CHALLENGES

Requires
outlay

Capturing requires up-front cost for long-term benefit

Fragmented

Potential is spread across millions of locations and billions of devices

Low mind-
share

Improving efficiency is rarely the primary focus of any in the economy

Difficult to
measure

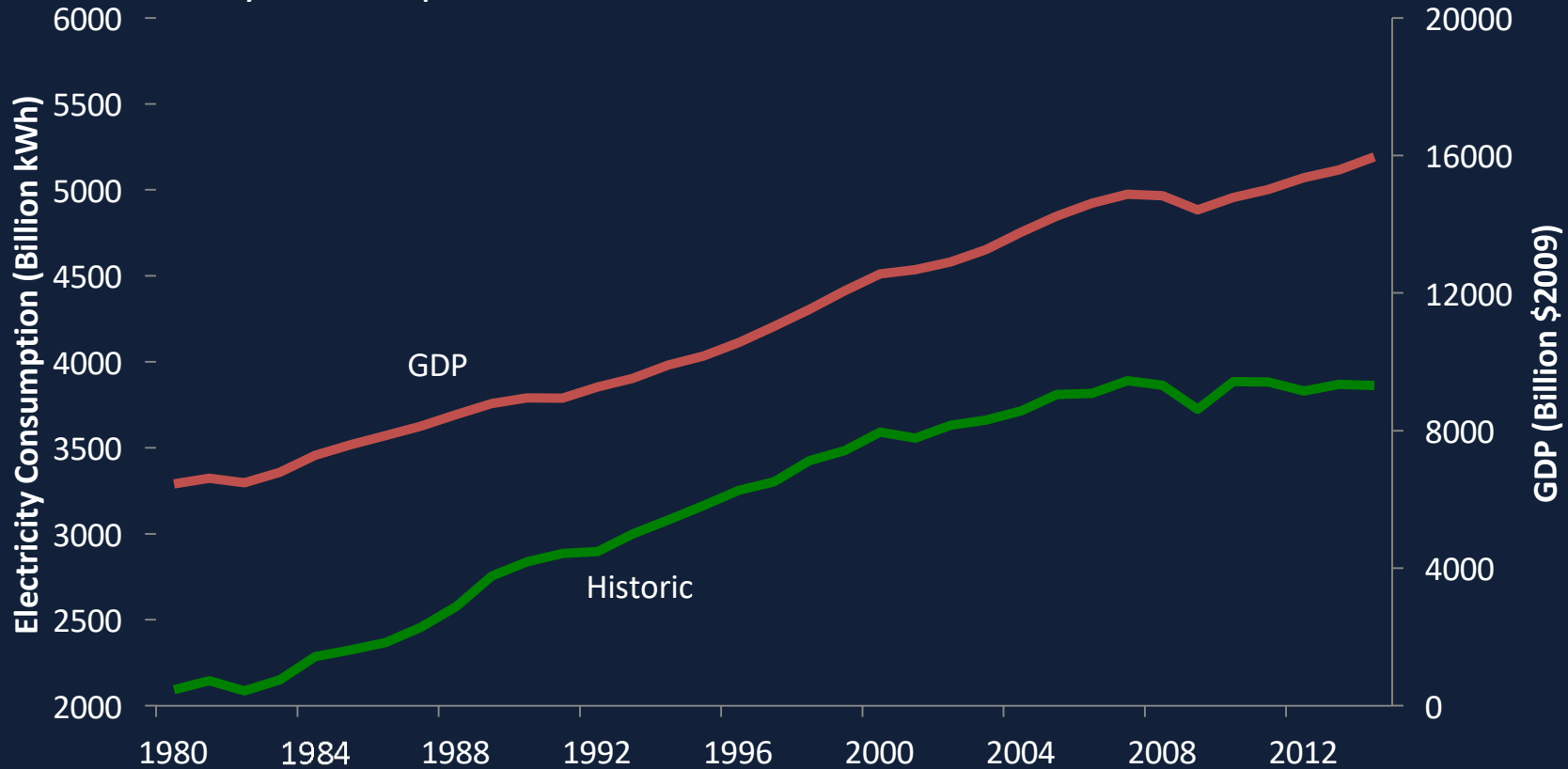
Evaluating, measuring and verifying savings is more difficult than measuring consumption



**WE ARE
CAPTURING
ENERGY
EFFICIENCY
FASTER THAN
MOST REALIZE**

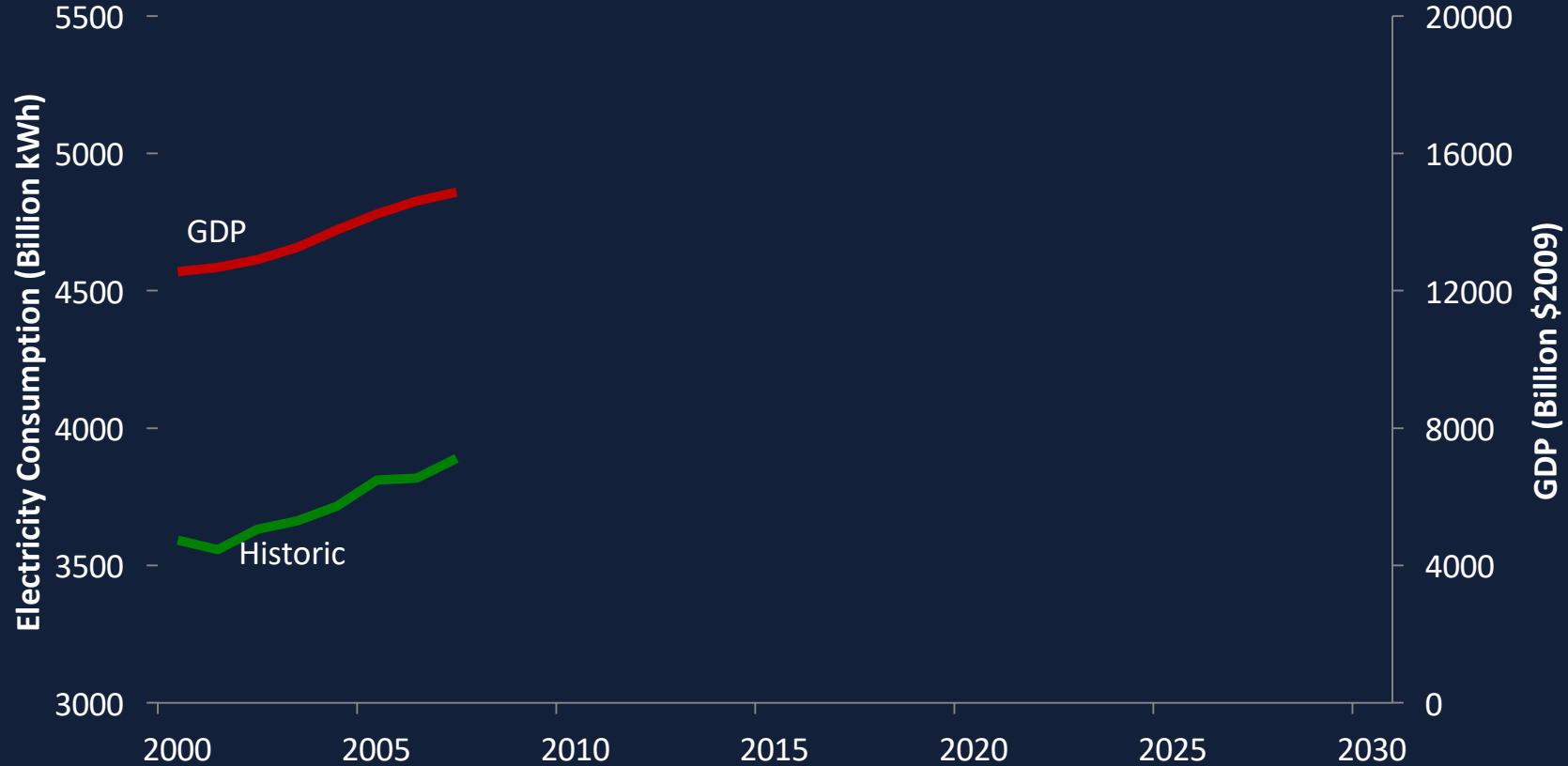
DEMAND IS FLATTENING (OR PRODUCTIVITY INCREASING)

US Electricity Consumption 1980 - Present



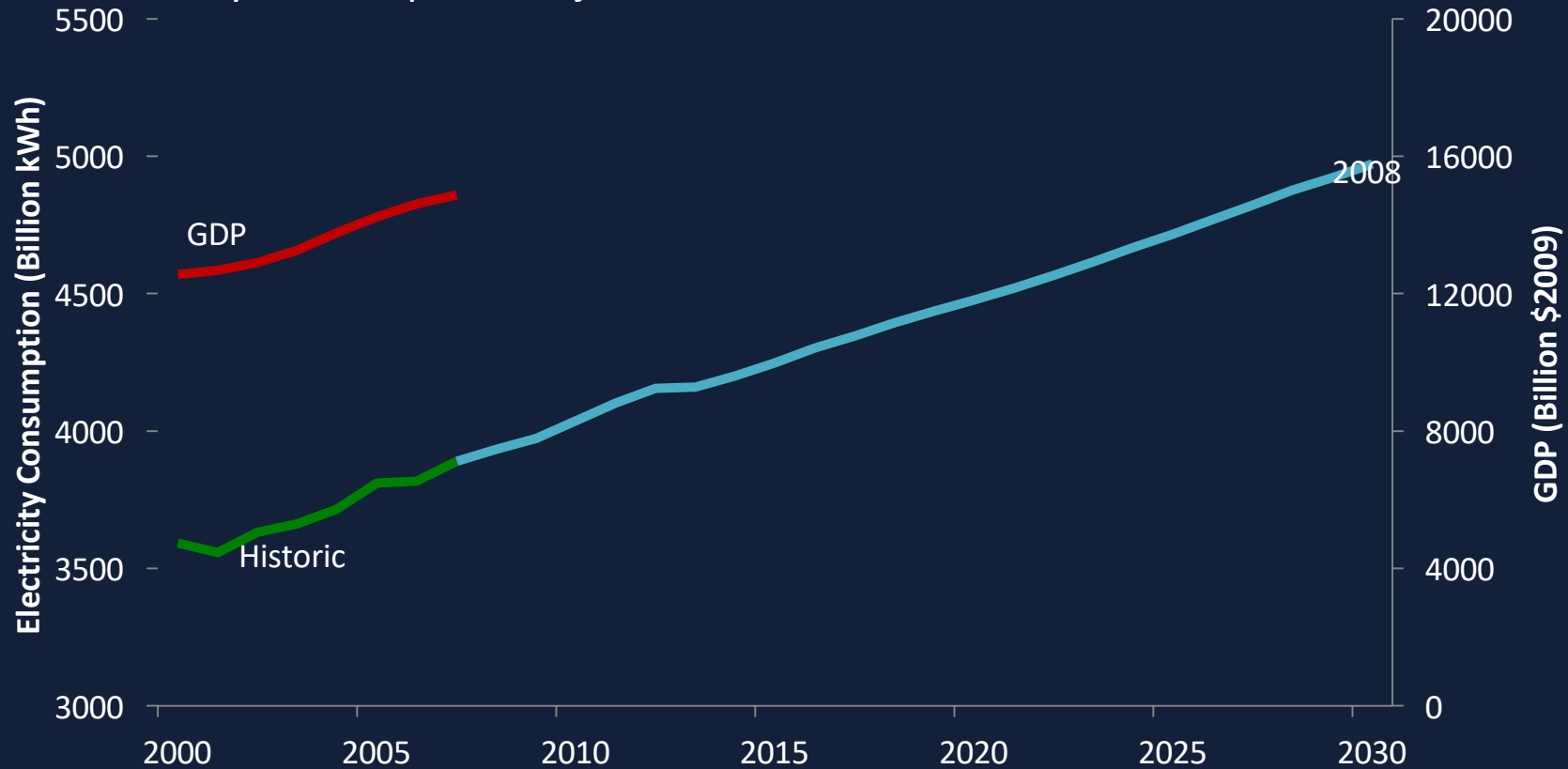
DEMAND IS FLATTENING – AND FORECASTS?

US Electricity Consumption Projections from EIA



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