



BP Energy Outlook

Country and regional insights – Middle East

The Middle East maintains its role as the world's top oil exporter, but loses share within natural gas exports as its gas consumption grows rapidly.

Fast facts

1. The Middle East remains the largest oil producing region, making up more than a third of the world's oil in 2035.
2. Natural gas accounts for more than half of the growth in the region's energy consumption
3. The share of non-fossil fuels in the region's energy mix rises from only 1% today to more than 5% by 2035.

+49%

Growth in Middle East energy consumption

8%

Share of global energy consumption in 2035

52%

Natural gas share in energy mix in 2035

37%

Share of global oil production in 2035

- In 2035, the Middle East makes up only 4% of global population, but contributes almost 8% to global energy consumption due to its high per capita energy consumption.
- Middle East energy consumption rises almost 50% by 2035, with natural gas accounting for more than half of the growth.
- Energy intensity is projected to fall (17% by 2035) having risen steadily since the mid-1970s. Nevertheless, the region still surpasses the FSU in the 2030s to become the most energy intensive region in the world.
- By 2035, fossil fuels still make up 95% of demand in 2035, with the share of natural gas rising from 50 to 52%. Oil's share falls from 48% to 42%.
- The shares of both nuclear and renewables in primary energy rise from close to zero today to 2%. Renewables growth is driven mainly by new solar capacity.
- By sector, industry remains the largest part of final energy consumption with a 42% market share in 2035.
- Energy used in power generation grows by 54%, with growth dominated by gas. Electricity supply rises by 94% due to improving power plant efficiency.
- Oil consumption rises by 34% or 3 Mb/d. Non-combusted fuel use (largely for new petrochemicals plants) provides more than half of the net growth (1.7 Mb/d)
- Oil production is expected to rise by 29% or 9 Mb/d by 2035, with growth in Saudi Arabia, Iraq and Iran.
- The Middle East remains the world's largest oil producing region; its share of global supply rises from 32% to 37% by 2035.
- The region also remains the world's largest oil exporter with volumes rising from 21 Mb/d in 2015 to nearly 27 Mb/d in 2035. It continues to make up more than half of all inter-regional exports.
- In contrast, liquefied natural gas (LNG) exports remain flat over the Outlook (at 12 Bcf/d) such that the Middle East share of LNG exports falls sharply from 37% today to 16% by 2035.



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	Level		Shares		Change (abs.)		Change (%)		Change (annual)*	
	2015	2035	2015	2035	1995-2015	2015-2035	1995-2015	2015-2035	1995-2015	2015-2035
Primary energy consumption (units in Mtoe unless otherwise noted)										
Total	885	1316			534	432	152%	49%	4.7%	2.0%
Oil† (Mb/d)	9	13	48%	42%	5	3	109%	34%	3.8%	1.5%
Gas (Bcf/d)	47	73	50%	52%	34	26	248%	55%	6.4%	2.2%
Coal	11	12	1%	1%	5	1	99%	12%	3.5%	0.6%
Nuclear	1	31	0%	2%	1	30	-	>1000%	-	>10%
Hydro	6	12	1%	1%	3	6	116%	100%	3.9%	3.5%
Renewables (including biofuels)	1	29	0%	2%	1	29	>1000%	>1000%	>10%	>10%
Power	287	442			184	155	179%	54%	5.3%	2.2%
Supply										
Oil (Mb/d)	30	39			10	9	50%	29%	2.1%	1.3%
Gas (Bcf/d)	60	85			45	25	315%	43%	7.4%	1.8%
Coal	1	1			0	0	0%	-18%	0%	-1.0%

*Compound annual growth rate

†Oil supply includes crude oil, shale oil, oil sands, natural gas liquids, liquid fuels derived from coal and gas, and refinery gains, but excludes biofuels. Oil demand includes consumption of all liquid hydrocarbons, but excludes biofuels.