



ORGANIZACIÓN | LATIN AMERICAN | ORGANIZAÇÃO | ORGANISATION  
LATINOAMERICANA | ENERGY | LATINO-AMERICANA | LATINO-AMERICAINE  
DE ENERGÍA | ORGANIZATION | DE ENERGIA | D'ENERGIE

# Latin America and Caribbean Energy Security Profile for Oil and Natural Gas

## The 5<sup>th</sup> APEC Oil and Gas Security Network Forum

Marcela Reinoso

10 -12 April 2019  
Sendai City, Miyagi, Japan

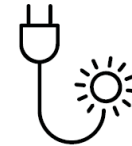
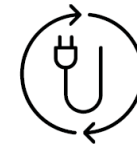
Nos une la **energía**  
Energy joins us

A decorative graphic in the bottom right corner consisting of a grid of blue and green dots forming a wave-like pattern.

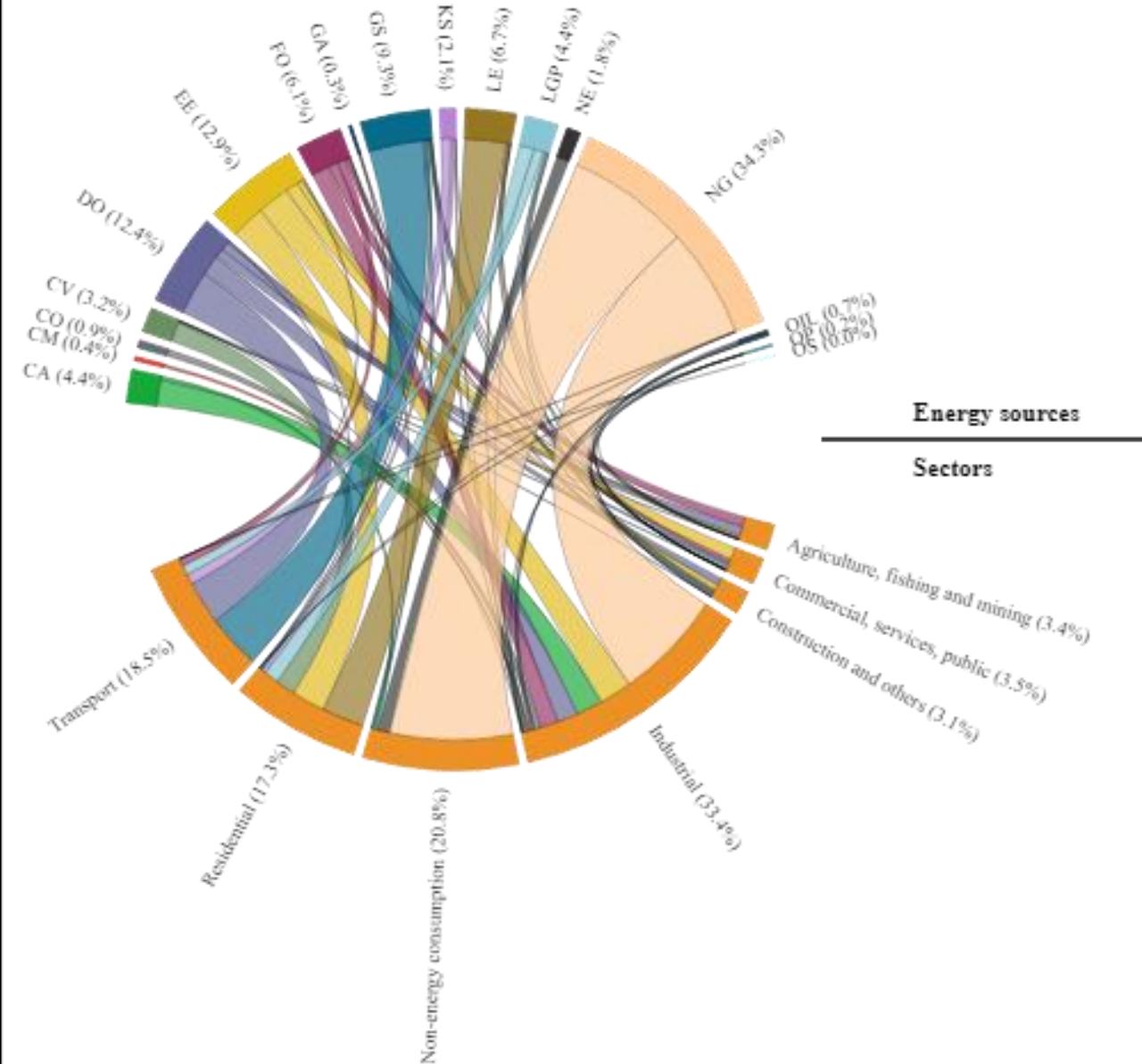


Intergovernmental organization which main purpose is the integration, protection, conservation, commercialization and defense of the energy resources of the region.

Areas of action:



# ¿How do Latin American and Caribbean countries consume energy? 2007-2017 Analysis



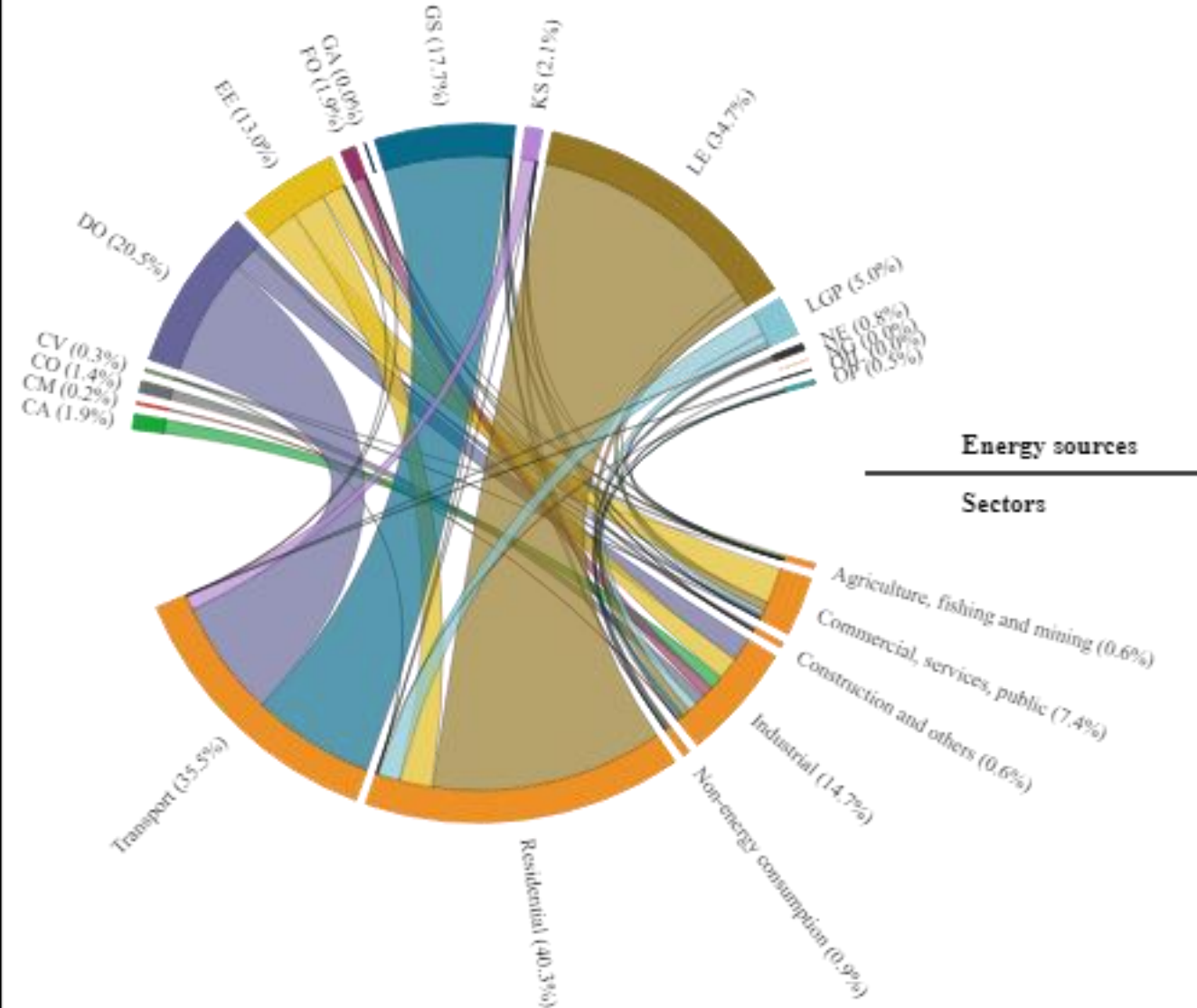
## Caribbean:

- The industrial sector is the main energy consumer.
- The consumption in the transport sector is increasing.

## Total primary energy supply facts:

- Crude Oil supply decreases in 4%.
- Natural gas supply increases in 1%.

# ¿How do Latin American and Caribbean countries consume energy? 2007-2017 Analysis



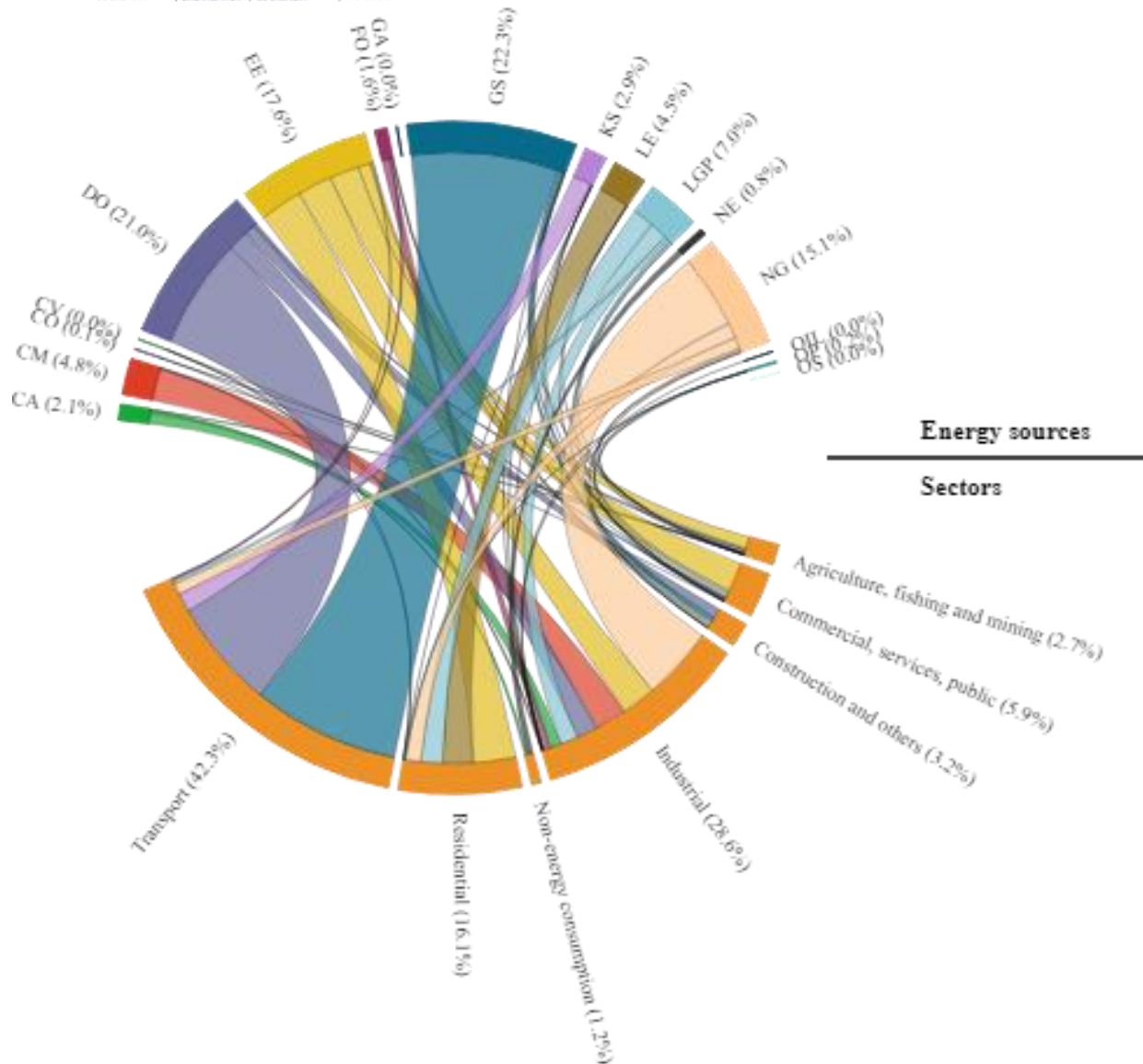
## Central America:

- The residential sector is the primarily energy consumer.
- The consumption in the transport sector is increasing.

## Total primary energy supply facts:

- Crude oil supply decreases in 11%.
- Natural gas supply is marginal.

# ¿How do Latin American and Caribbean countries consume energy? 2007-2017 Analysis



## Andean Zone:

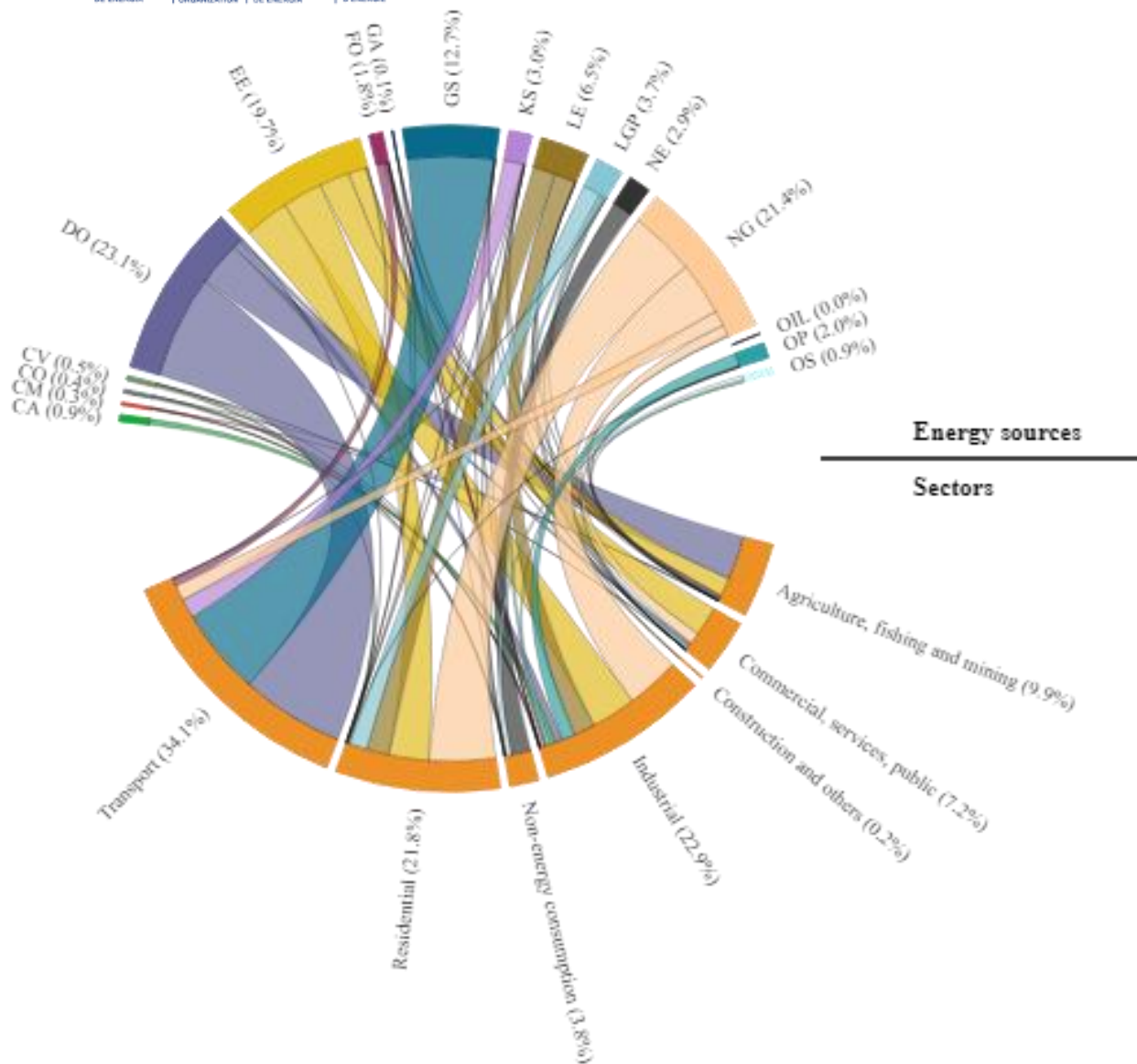
- The transport sector is the main energy consumer.
- The consumption in the industrial sector is increasing.

## Total primary energy supply facts:

- Crude oil supply decreases.
- Natural gas supply is bigger than crude oil supply.



# ¿How do Latin American and Caribbean countries consume energy? 2007-2017 Analysis



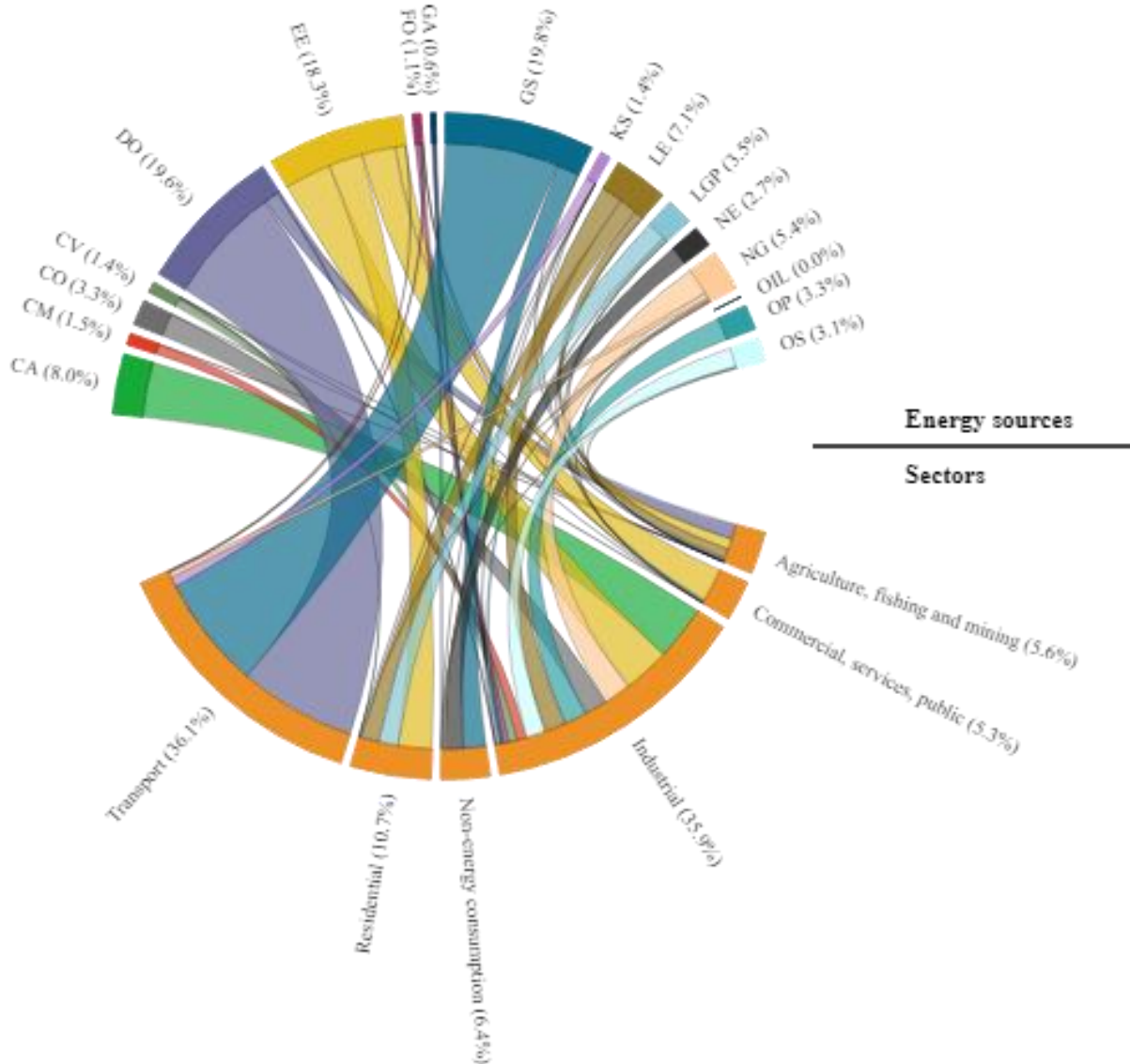
## South Cone without Brazil:

- The transport sector is the main energy consumer.
- The consumption in the industrial sector is slightly decreasing.

## Total primary energy supply facts:

- Crude oil is also reducing its participation in the supply energy mix.
- Coal and other primaries are increasing their respective participation in the energy mix.

# ¿How do Latin American and Caribbean countries consume energy? 2007-2017 Analysis



## Brazil:

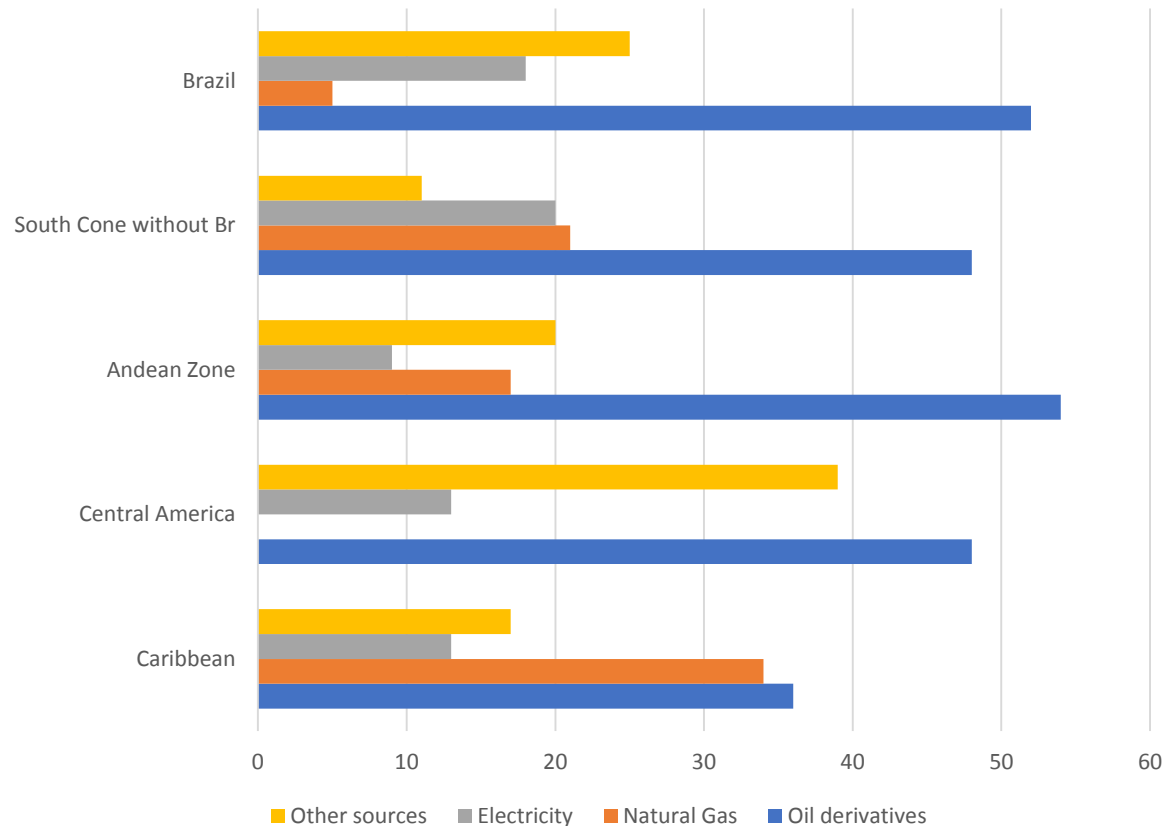
- The consumption in the transport sector has increased.
- The consumption in the industrial sector has decreased.

## Total primary energy supply facts:

- Crude oil is also reducing its participation in the supply energy mix.
- Natural gas supply participation in the energy mix has increased.

# ¿How do Latin American and Caribbean supply the final consumption? 2007-2017 Analysis

Final Energy consumption supplying sources

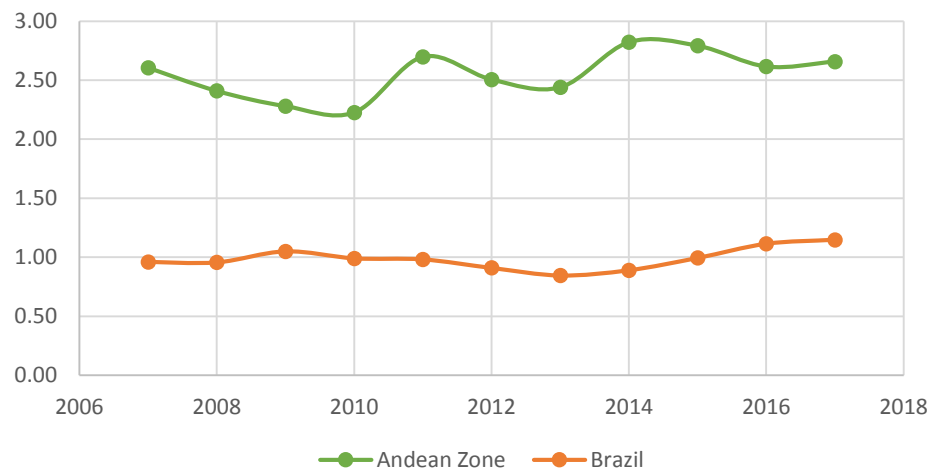


**The final consumption is supplied mainly by oil derivatives and natural gas.**



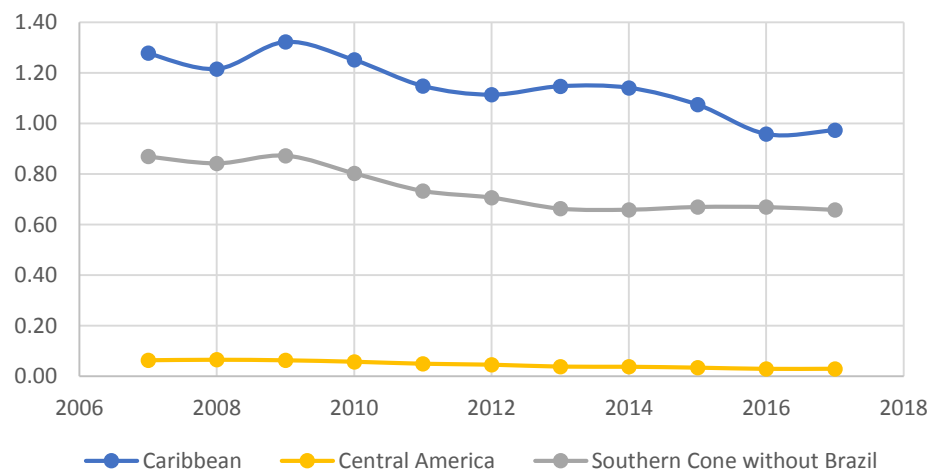
## ¿How well do Latin American and Caribbean supply oil derivatives and natural gas?

Hydrocarbon Autarky



- The Andean Zone and Brazil are theoretically self-sufficient, although, they import oil derivatives.

Hydrocarbon Autarky



- The Caribbean, Central America and South Cone without Brazil depend on importing oil, natural gas and derivatives.

## Identifying Weaknesses

- Latin America and Caribbean crude oil production peaked in 2005. Natural gas production peaked in 2014.
- Infrastructure, market and policies framework for natural gas are not homogeneously developed in the region.
- The transport sector is growing in a context where more than 40% of the fuels consumed are imported. The regional production of diesel oil and gasoline is decreasing.
- There are certain fuel exchanges in case of emergencies between neighboring countries, but there are not emergency protocols that involve regional cooperation.



ORGANIZACIÓN | LATIN AMERICAN | ORGANIZAÇÃO | ORGANISATION  
LATINOAMERICANA | ENERGY | LATINO-AMERICANA | LATINO-AMERICAINE  
DE ENERGÍA | ORGANIZATION | DE ENERGIA | D'ENERGIE

Muchas gracias

ありがとう

[marcela.reinoso@olade.org](mailto:marcela.reinoso@olade.org)

Nos une la **energía**  
Energy joins us.