

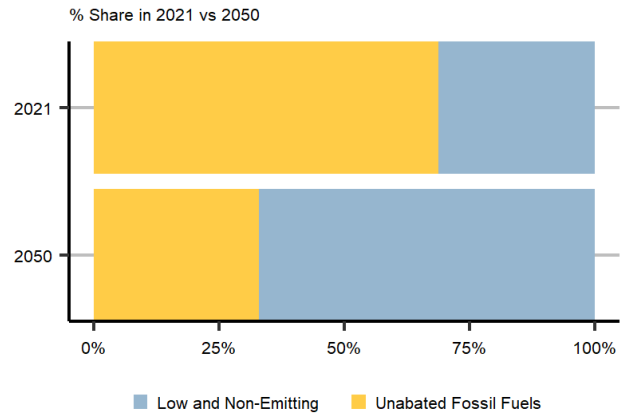
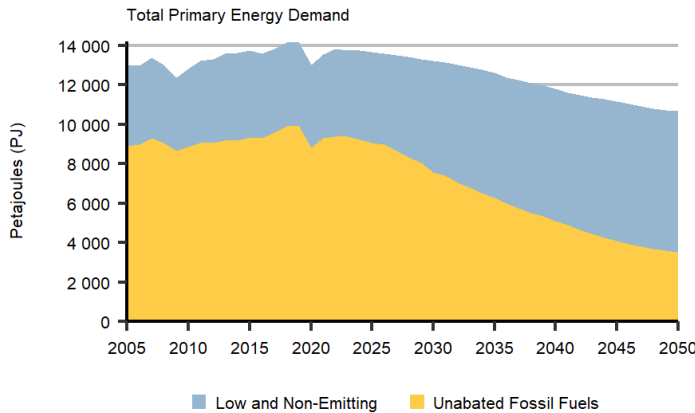


Energy Demand

Primary Energy Demand in the Evolving Policies Scenario

In the Evolving Policies Scenario, combustion of fossil fuels whose emissions are not captured falls, while use of low and non-emitting energy sources increases.

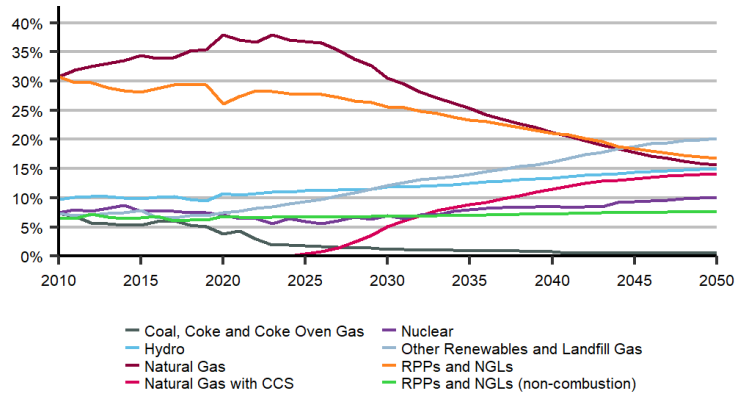
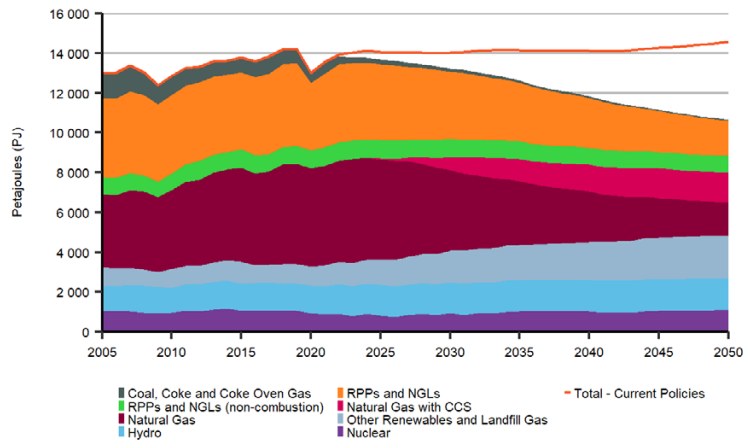
Unabated fossil fuel use falls 60% by 2050 from current levels.



Primary Energy Demand by Fuel and Share of Total Demand - Evolving Policies Scenario

In the Evolving Policies Scenario, total primary demand falls 21%, from 2021 to 2050, driven by reductions in fossil fuel use. In the Current Policies Scenario, total primary demand increases by 7.5% from 2021 to 2050.

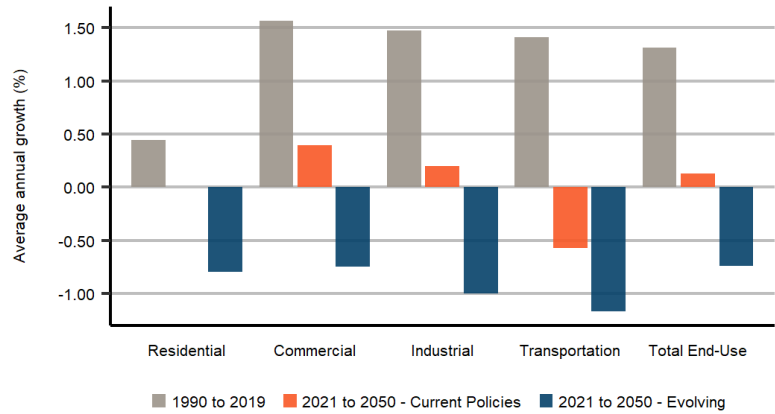
In the Evolving Policies Scenario, the relative share of refined petroleum products, coal, and natural gas without carbon capture and storage (CCS) declines. The share of non-hydro renewables and natural gas increase significantly. Demands for hydro and nuclear remain relatively stable in the projection, so their share gradually increases as total demand declines.



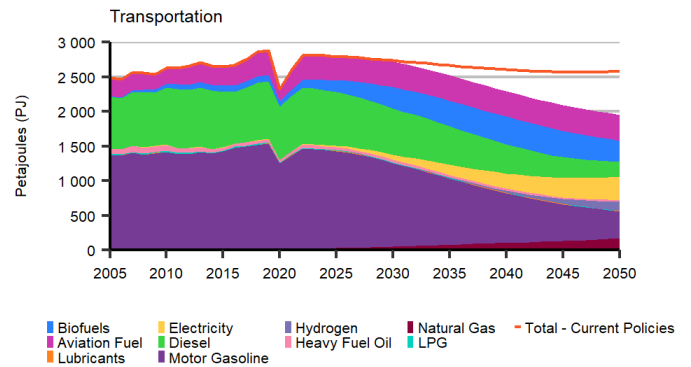
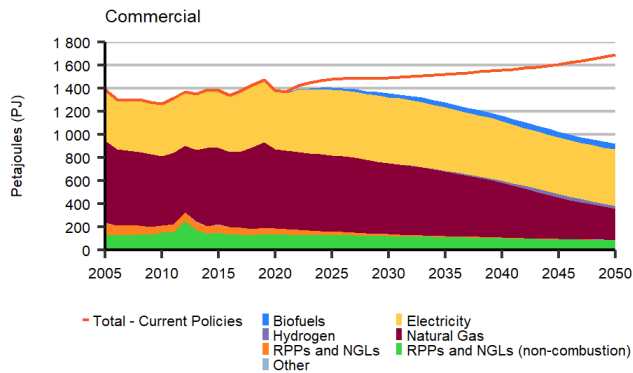
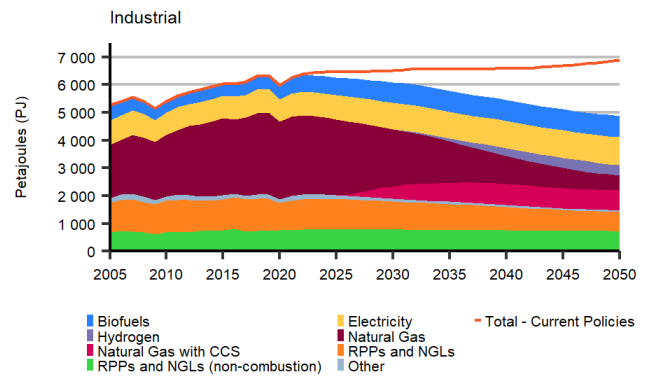
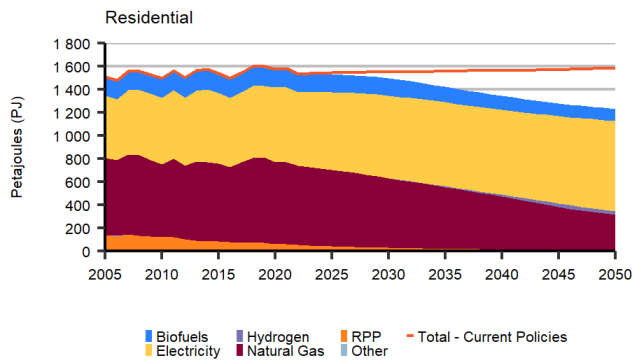
Sectoral End-Use Demand Changes - Evolving Policies Scenario

Canadian energy use demand is projected to decline to 2050. These declines result from several drivers, including macroeconomics, energy production trends, energy efficiency improvements, policies, technology advancements, and market developments.

End-use demand is energy used by final consumers. It includes electricity and excludes the fuel source used to generate the electricity.



Sectoral End-Use Demand, by Fuel - Evolving Policies Scenario



Macroeconomic Assumptions and Energy Intensity, Average Annual Growth Rates 2019 - 2050*

| | Real Gross Domestic Product (GDP) | Population | Energy Use Per Person | Energy Use Per \$ Real GDP | Fossil Fuel Use Per \$ GDP |
|-----------------------------------|-----------------------------------|------------|-----------------------|----------------------------|----------------------------|
| Evolving Policies Scenario | 1.6% | 0.8% | -1.7% | -2.4% | -3.7% |
| Current Policies Scenario | 1.6% | 0.8% | -0.7% | -1.5% | -2.1% |

*2019 instead of 2020 due to the pandemic.