

The MENA Power Paradox: Why Cooling and Desalination Demand an Accelerated \$1 Trillion Grid Overhaul

IEA forecasts a 50% surge in MENA electricity demand by 2035, with cooling and desalination alone driving 40% of the growth and demanding a multi-trillion-dollar overhaul of the region's power mix and grid.

THE SHORT ANSWER

Why does MENA need a massive grid overhaul by 2035?

The IEA forecasts MENA electricity demand will surge 50% by 2035, equivalent to adding the combined current consumption of Spain and Germany, with cooling and desalination driving about 40% of that growth. Meeting it requires over 110 GW of new gas capacity, a tenfold increase in solar PV, and a multi-trillion-dollar overhaul of grid, storage and cross-border interconnection infrastructure.

In this briefing

01

02

03

04

FIG.54.02 · DATA

FIGURES AS STATED IN THE FULL DOSSIER; ESTIMATES MARKED AS SUCH.

What matters

- 01 MENA electricity demand is set to surge 50% by 2035, per the IEA, equal to adding Spain and Germany's combined consumption.
- 02 Cooling and desalination together will drive about 40% of the region's electricity demand growth over the next decade.
- 03 Cooling already accounts for nearly half of MENA's peak electricity demand, as regional temperatures rise more than twice the global average rate.
- 04 Gas and oil generate over 90% of MENA electricity today, with oil-fired power alone consuming 1.8 million barrels per day.
- 05 Gas-fired capacity is set to rise by over 110 GW by 2035, meeting roughly half of new demand, while solar PV capacity is on course for a tenfold increase.

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