The role of LNG in an unconventional world

Jérôme Ferrier
IGU President
Natural gas worldwide demand growth 2005-2020

Source: IEA, BP

WPC-IGU Gas Forum Special Session 16, 18 June 2014, Moscow
Gas demand growth to 2025 mainly driven by Asia

Source: BG Group

Global gas demand (bcma)

2.4% CAGR

Source: BG Group
Chinese Gas Demand (IEA Scenario)

Source: Oxford Institute for Energy Studies
Asian LNG Demand (Japan, Korea, Taiwan, India, China)

Source: Oxford Institute for Energy Studies
LNG Supply (Excluding North America)

Source: Oxford Institute for Energy Studies
Assessed shale oil and shale gas basins in the world

Source: IEA, Advanced Resources International
Top 10 countries with technically recoverable shale gas resources

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Shale gas (trillion cubic feet)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>1,115</td>
</tr>
<tr>
<td>2</td>
<td>Argentina</td>
<td>802</td>
</tr>
<tr>
<td>3</td>
<td>Algeria</td>
<td>707</td>
</tr>
<tr>
<td>4</td>
<td>U.S.1</td>
<td>665 (1,161)</td>
</tr>
<tr>
<td>5</td>
<td>Canada</td>
<td>573</td>
</tr>
<tr>
<td>6</td>
<td>Mexico</td>
<td>545</td>
</tr>
<tr>
<td>7</td>
<td>Australia</td>
<td>437</td>
</tr>
<tr>
<td>8</td>
<td>South Africa</td>
<td>390</td>
</tr>
<tr>
<td>9</td>
<td>Russia</td>
<td>285</td>
</tr>
<tr>
<td>10</td>
<td>Brazil</td>
<td>245</td>
</tr>
</tbody>
</table>

World Total: 7,299 (7,795)

1 EIA estimates used for ranking order. ARI estimates in parentheses.

Source: EIA, ARI June 2013
Global unconventional gas production 2010-2040

Source: IEA
Ten largest unconventional gas producers in 2035

Source: IEA
Unconventional gas production forecast in China

Source: IEA

WPC-IGU Gas Forum Special Session 16, 18 June 2014, Moscow
Impact of shale gas on international gas trade to 2035

Source: IEA
Natural gas prices in Asia, Europe and the USA
US natural gas production by source 1990 to 2040
North American LNG Imports and Exports to 2025

Source: Oxford Institute for Energy Studies
Location of coal seam gas in Australia

Coal seam gas

The map is intended as a schematic depiction of the location of sedimentary basins with predicted potential for shale oil or gas based on their gross geological characteristics. Many basins highlighted do not have proven potential for shale oil or gas, and not all of the highlighted areas are necessarily prospective. Shale oil or gas may also occur outside of the highlighted areas.

Source: ACOLA
Australian gas production forecast to 2035

Source: EIA
Asian Future LNG pricing trends to 2025

Source: Oxford Institute for Energy Studies
Conferencia mundial del gas 2015

26th
WORLD GAS CONFERENCE
PARIS FRANCE
1 - 5 june 2015