



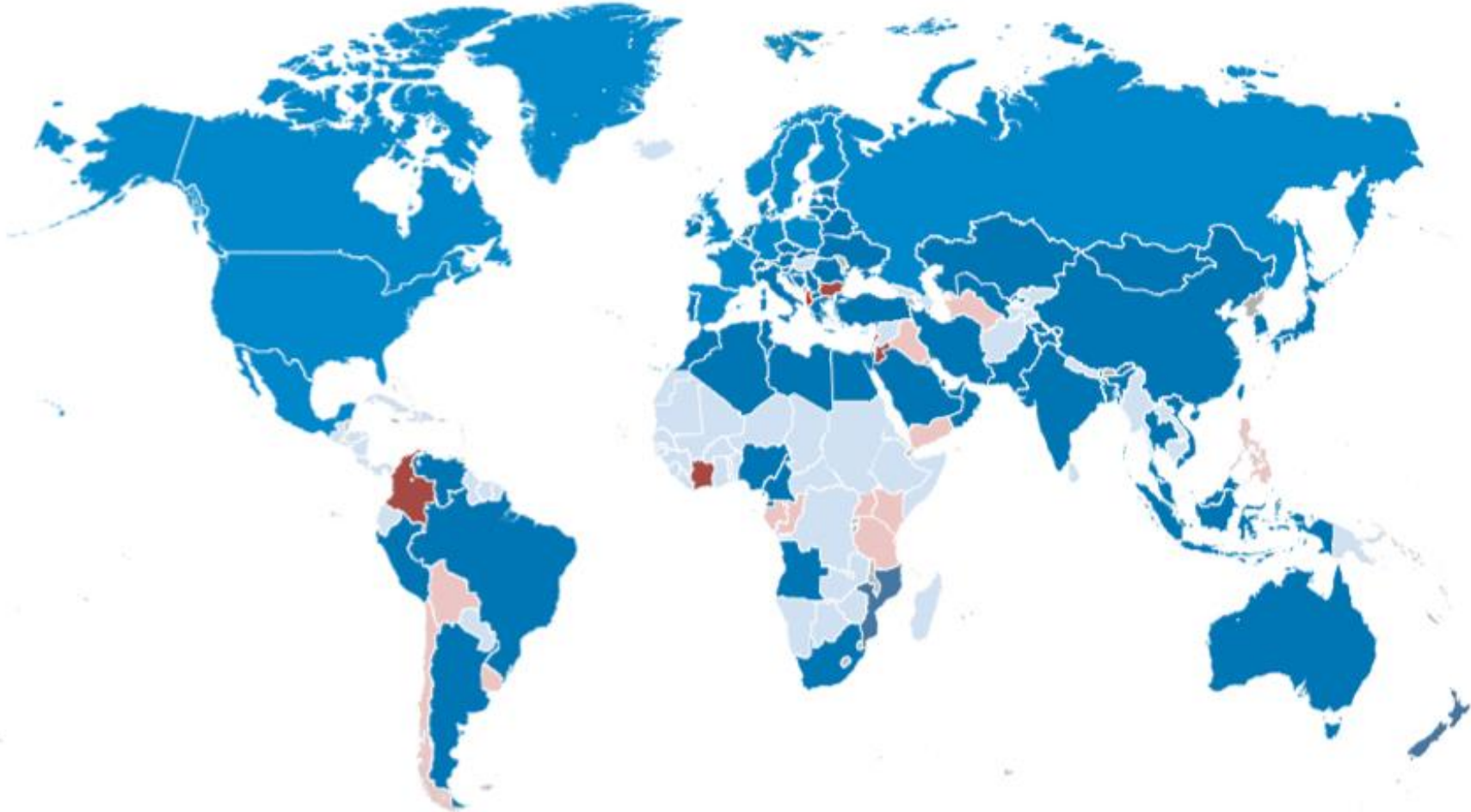
Tuesday, 27 January 2015

Global outlook on Gas and LNG

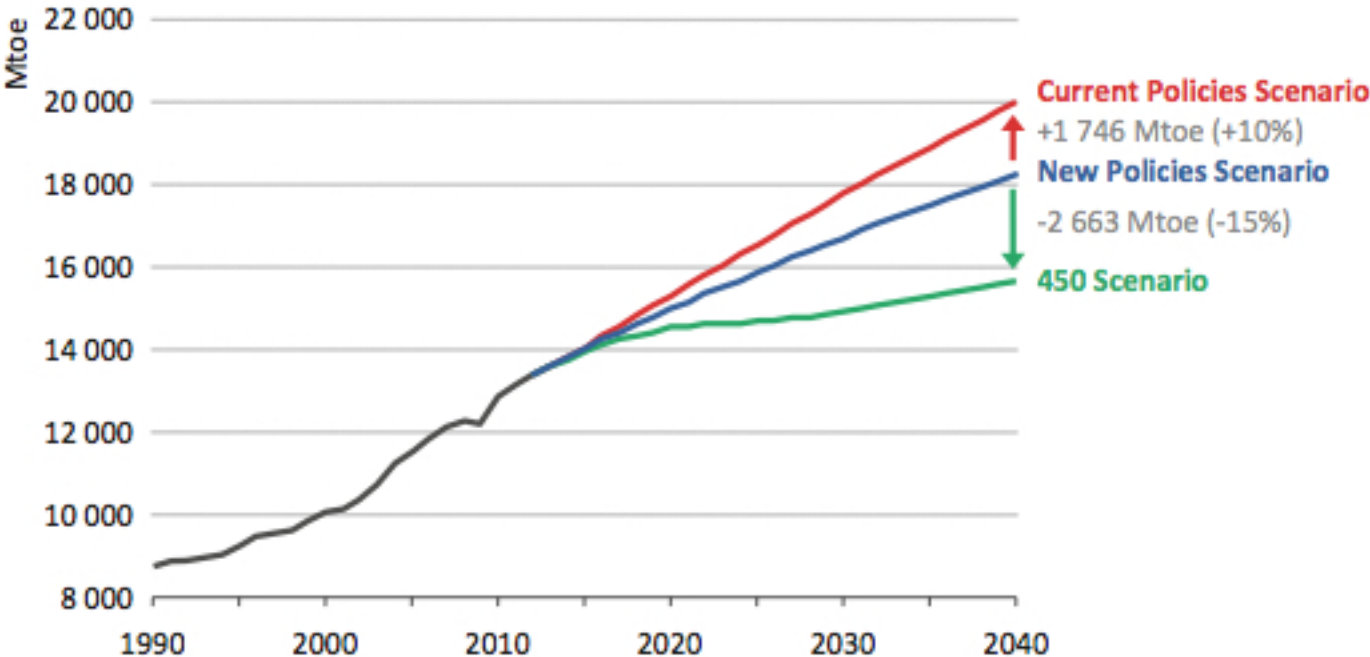
Jérôme Ferrier
President IGU

IGU is the voice of 95 % of the Global Gas Market

91 Member Countries, 43 Associate Members

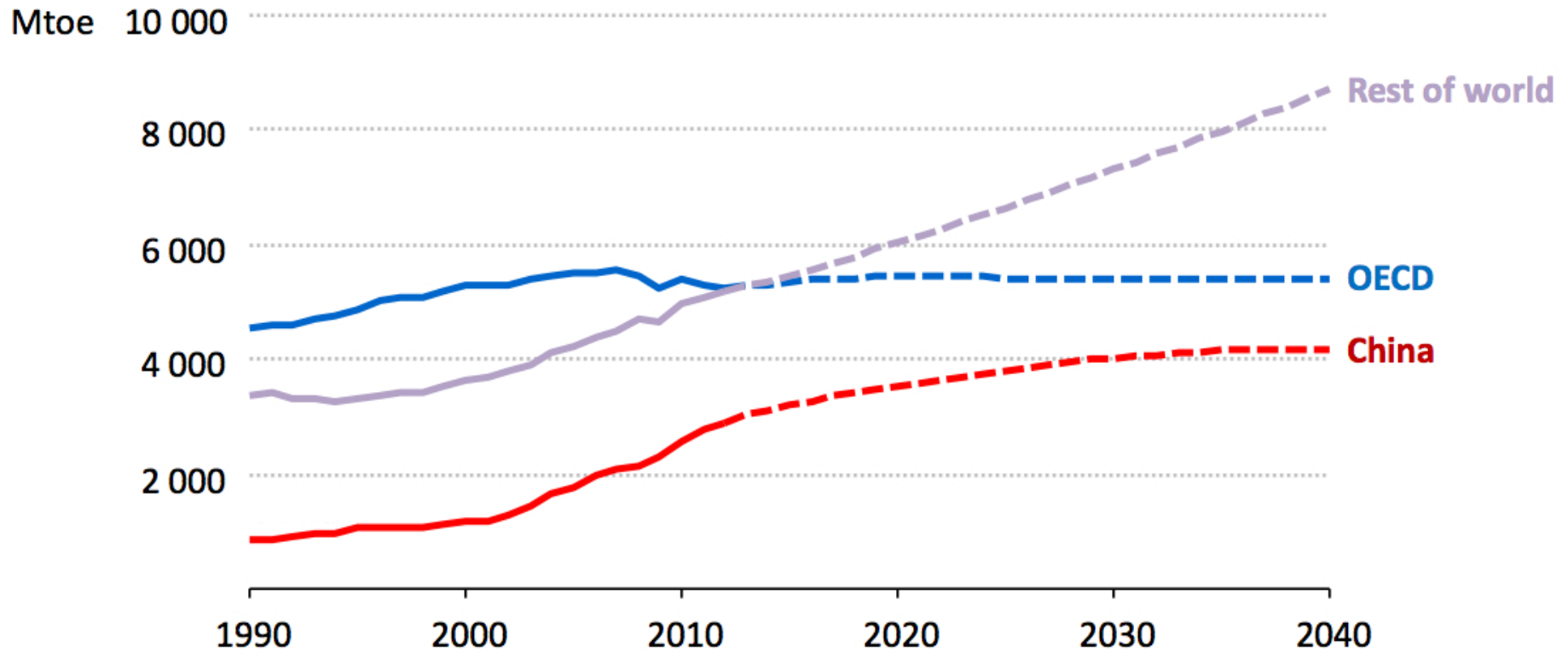


World primary energy demand by scenario 1990-2040



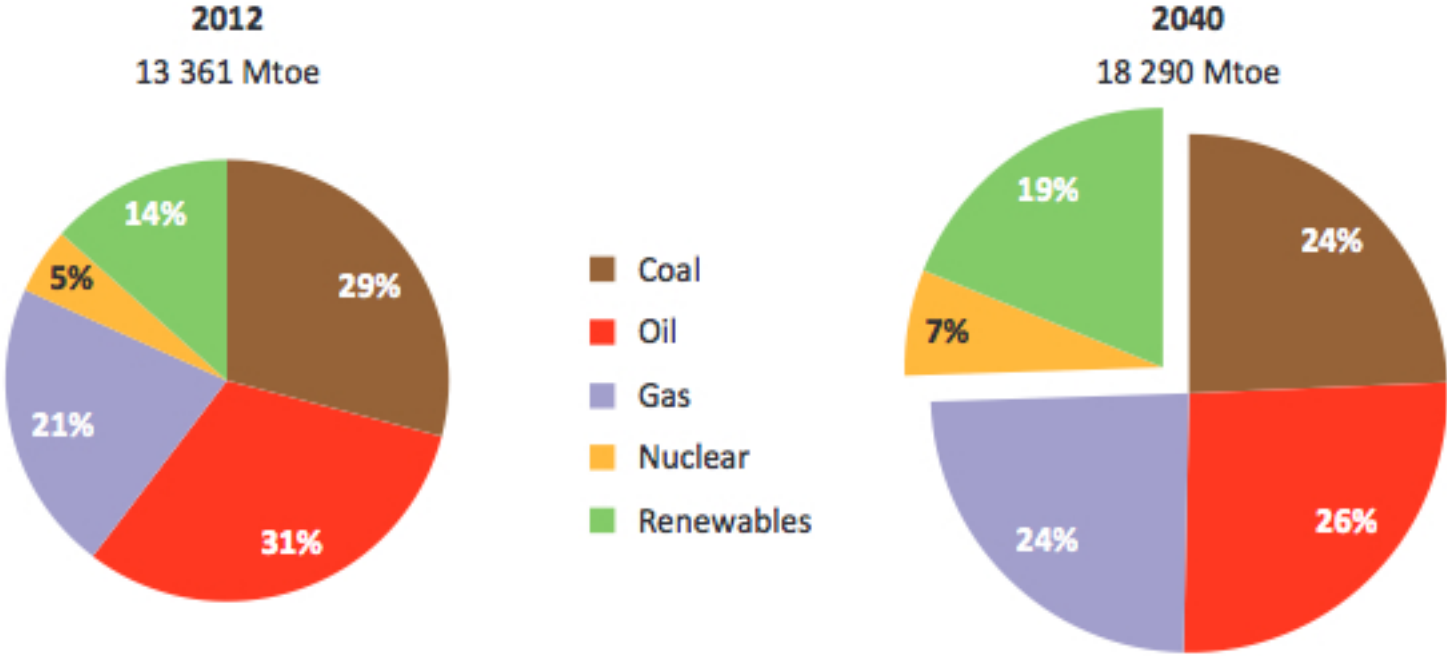
Source: IEA WEO 2014

Energy demand by region 1990-2040



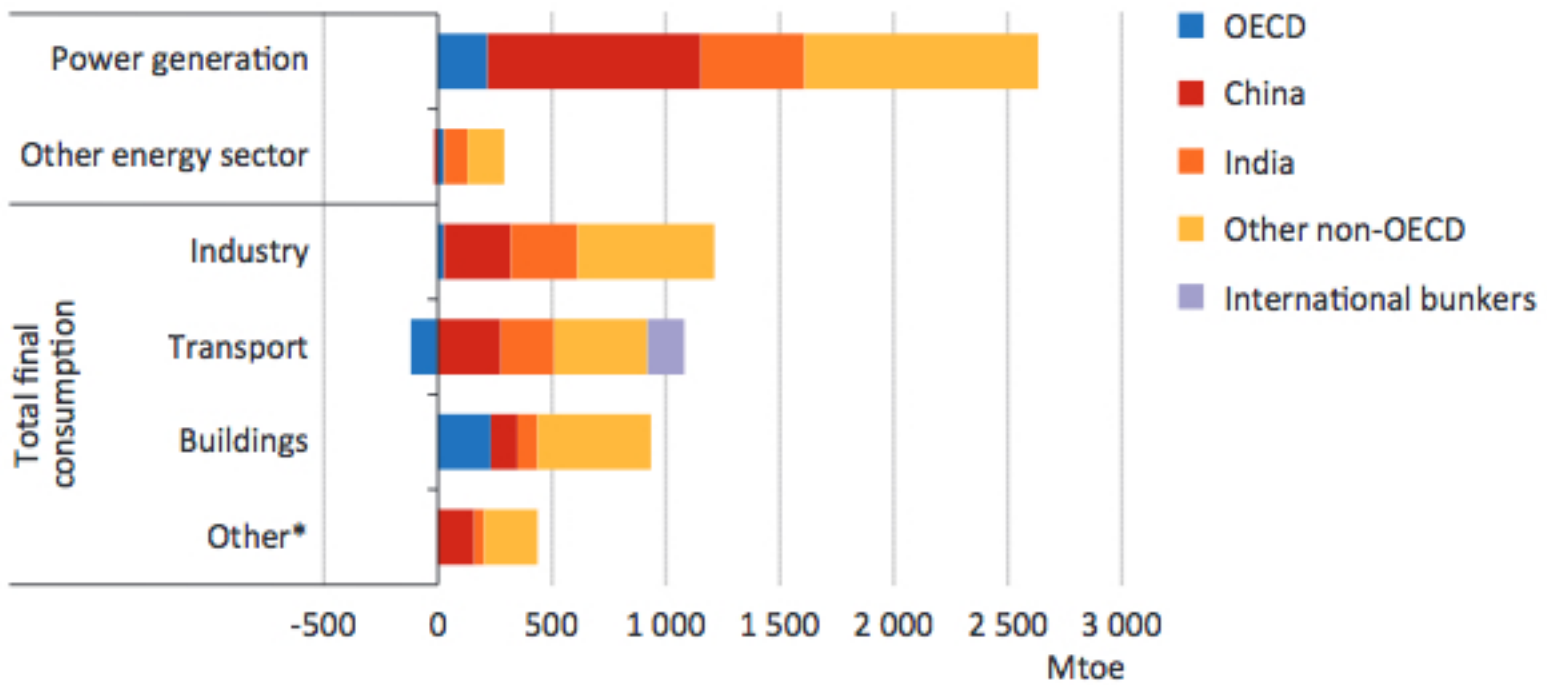
Source: IEA WEO 2014

Fuel shares in the global energy mix 2012-2040



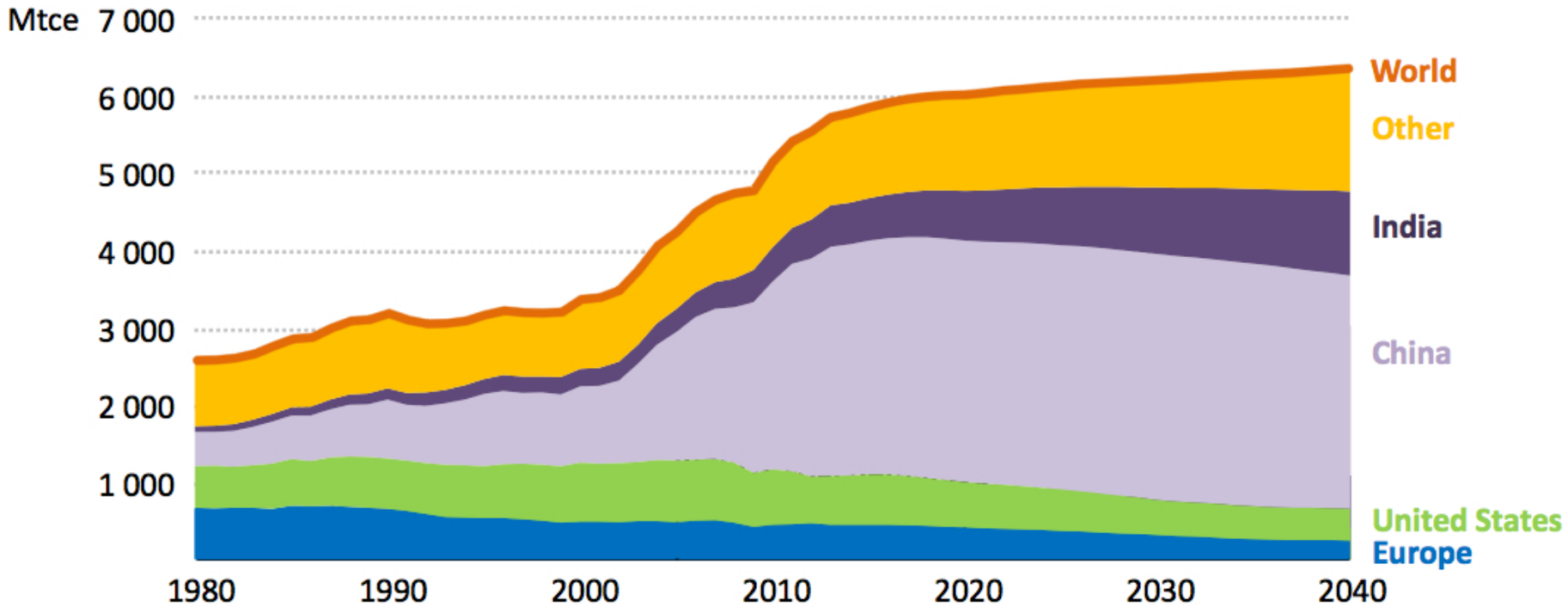
Source: IEA WEO 2014

Changes in energy demand by sector and region 2012-2040



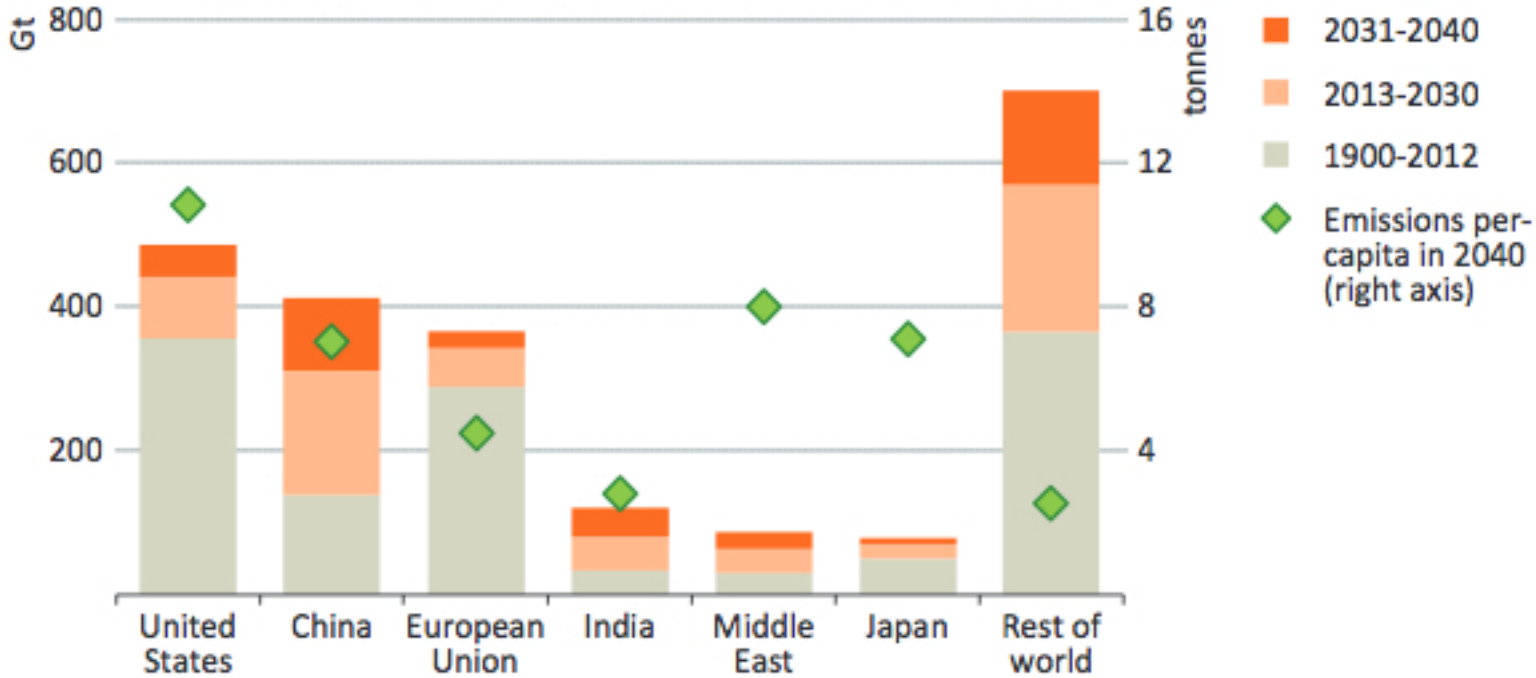
Source: IEA WEO 2014

Global coal demand by region 1980-2040



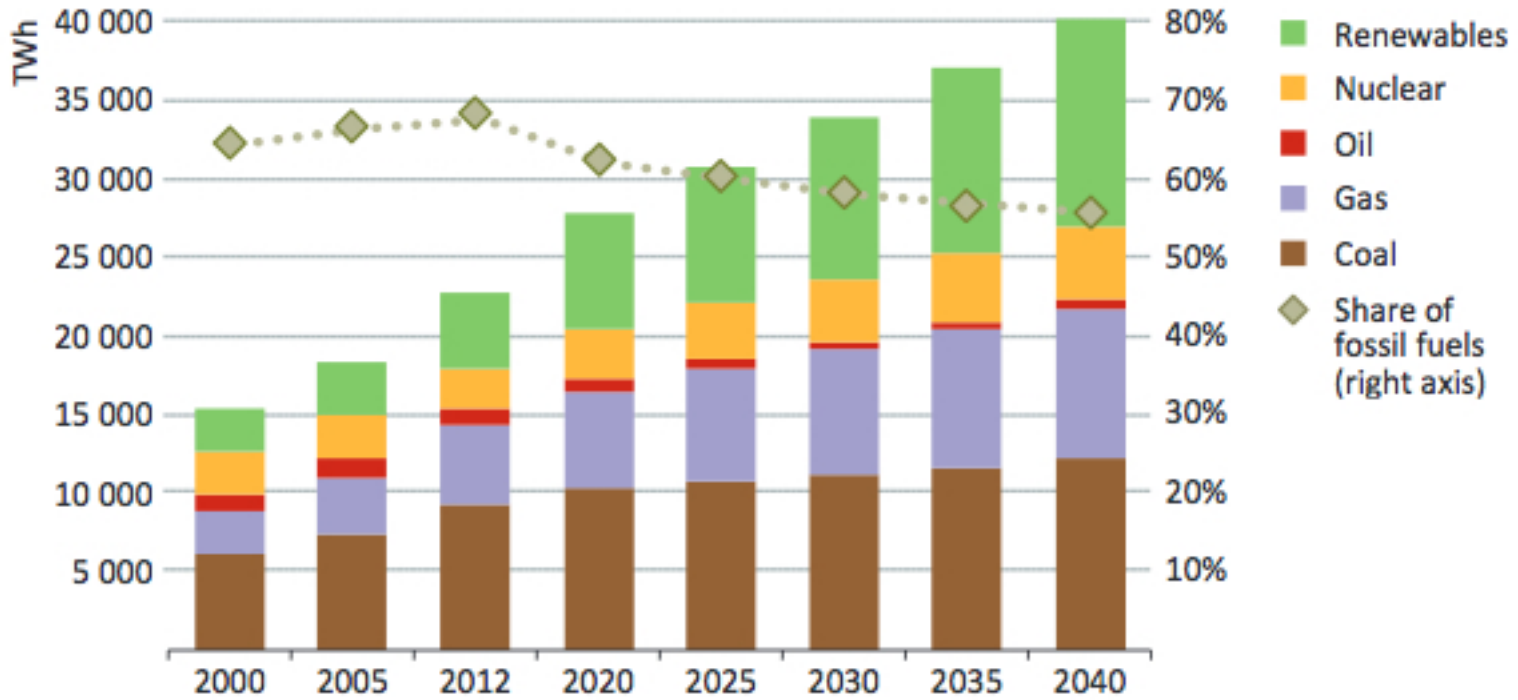
Source: IEA WEO 2014

Cumulative CO2 emissions by region 1900-2040



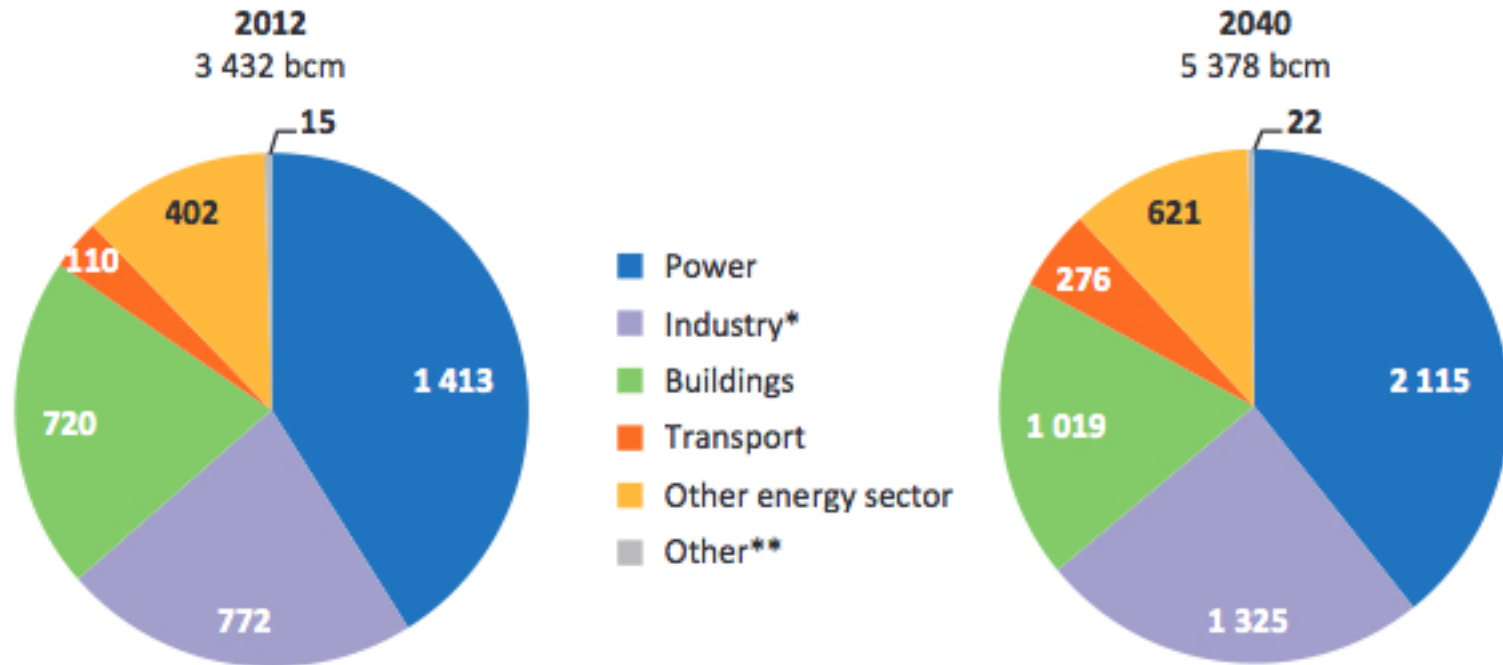
Source: IEA WEO 2014

World electricity generation by fuel type 2000-2040 (TWh)



Source: IEA WEO 2014

World natural gas demand by sector 2012-2040

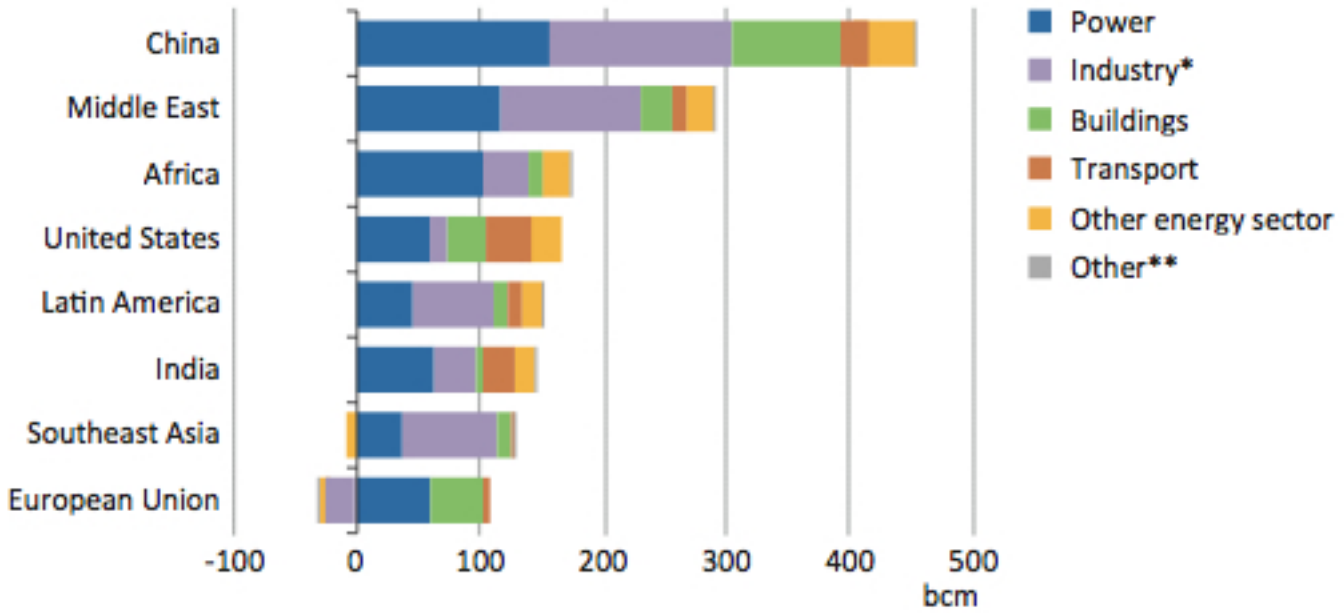


*Industry includes gas used as petrochemical feedstocks and energy consumption in coke ovens and blast furnaces.

**Other includes agriculture and any other non-energy use.

Source: IEA WEO 2014

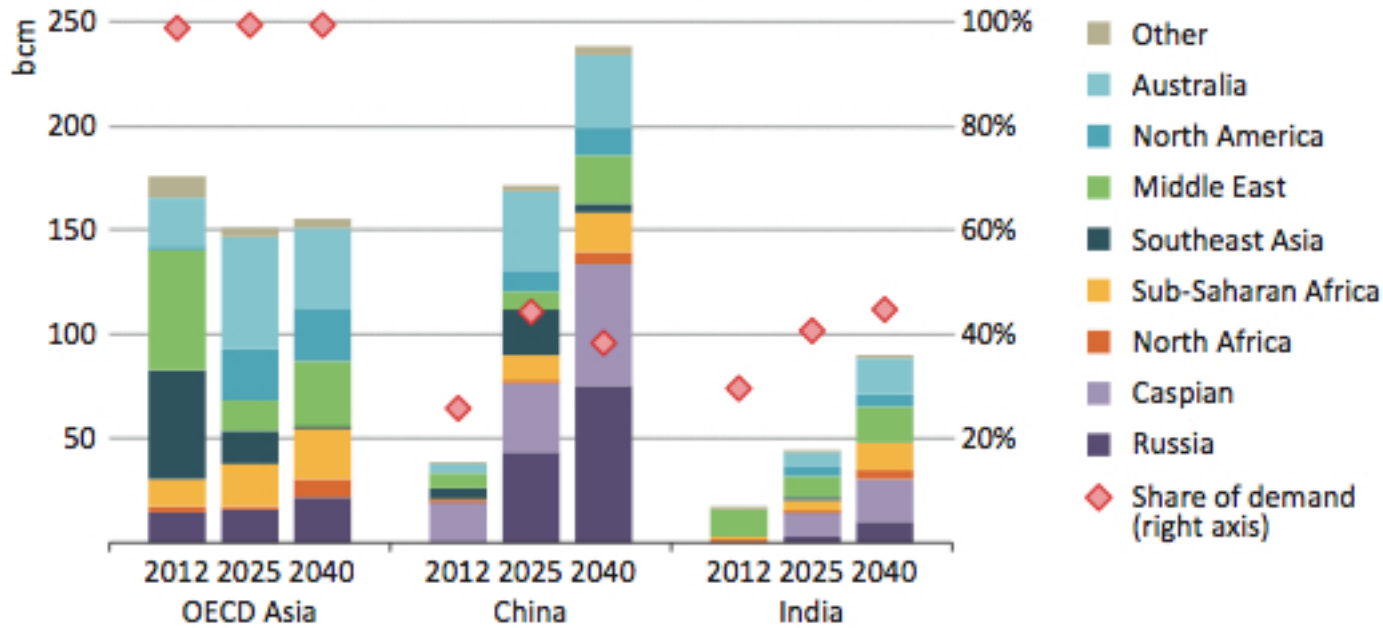
Changes in natural gas demand 2012-2040 by sector and region



*Industry includes gas used as petrochemical feedstocks and energy consumption in coke ovens and blast furnaces.
 **Other includes agriculture and any other non-energy use.

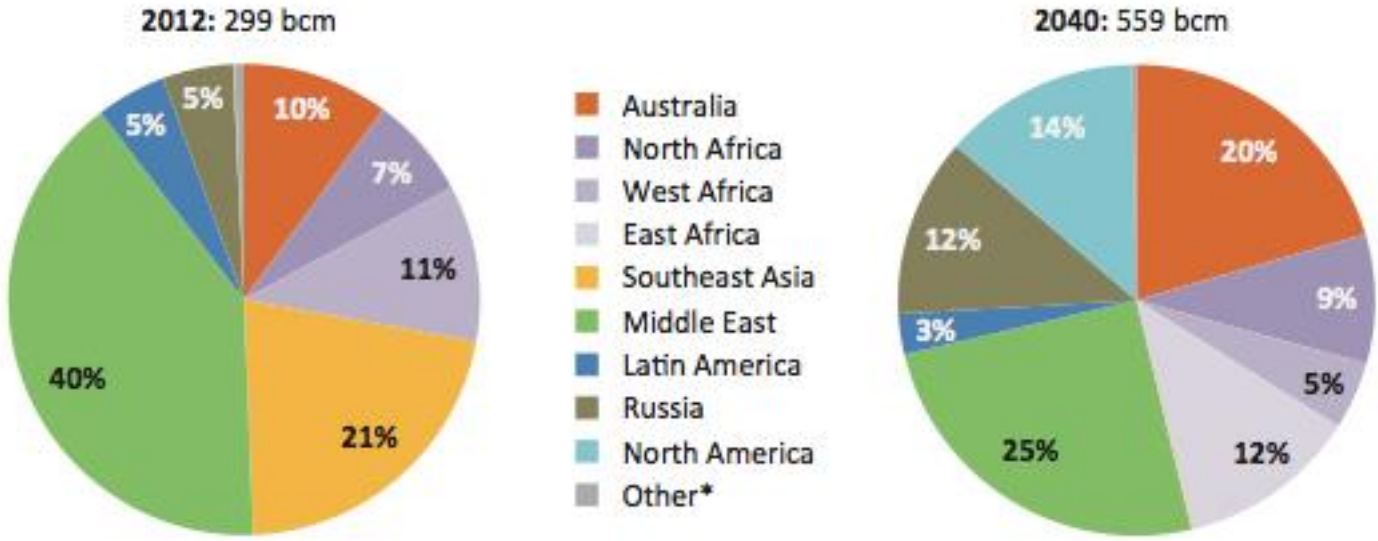
Source: IEA WEO 2014

Natural gas and LNG imports in Asia 2012 to 2025



Source: IEA WEO 2014

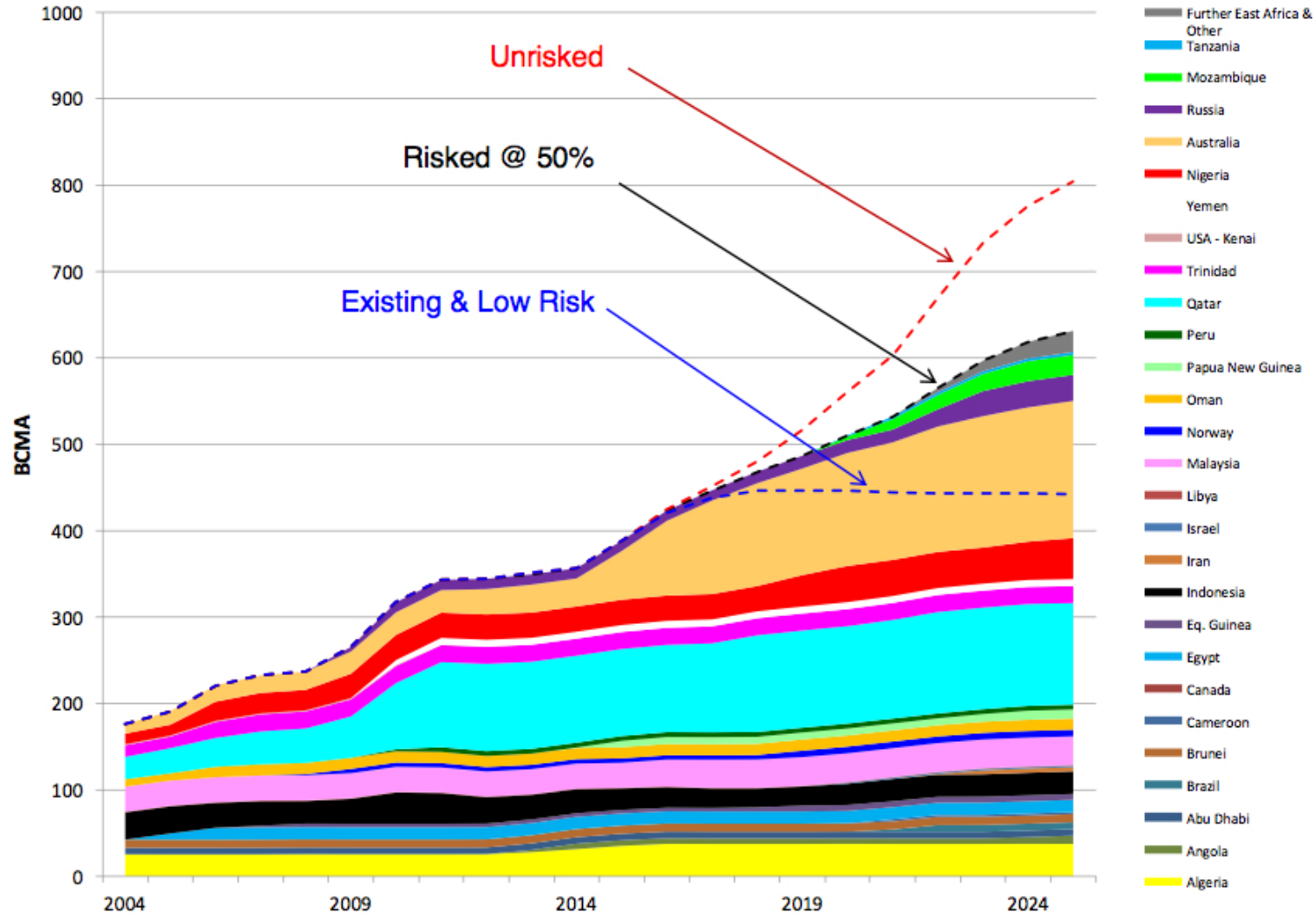
Inter-regional LNG exports by source 2012 and 2040



* Other includes OECD Europe and Other Developing Asia; anticipated exports from this region are less than 1% of the total in both 2012 and 2040.

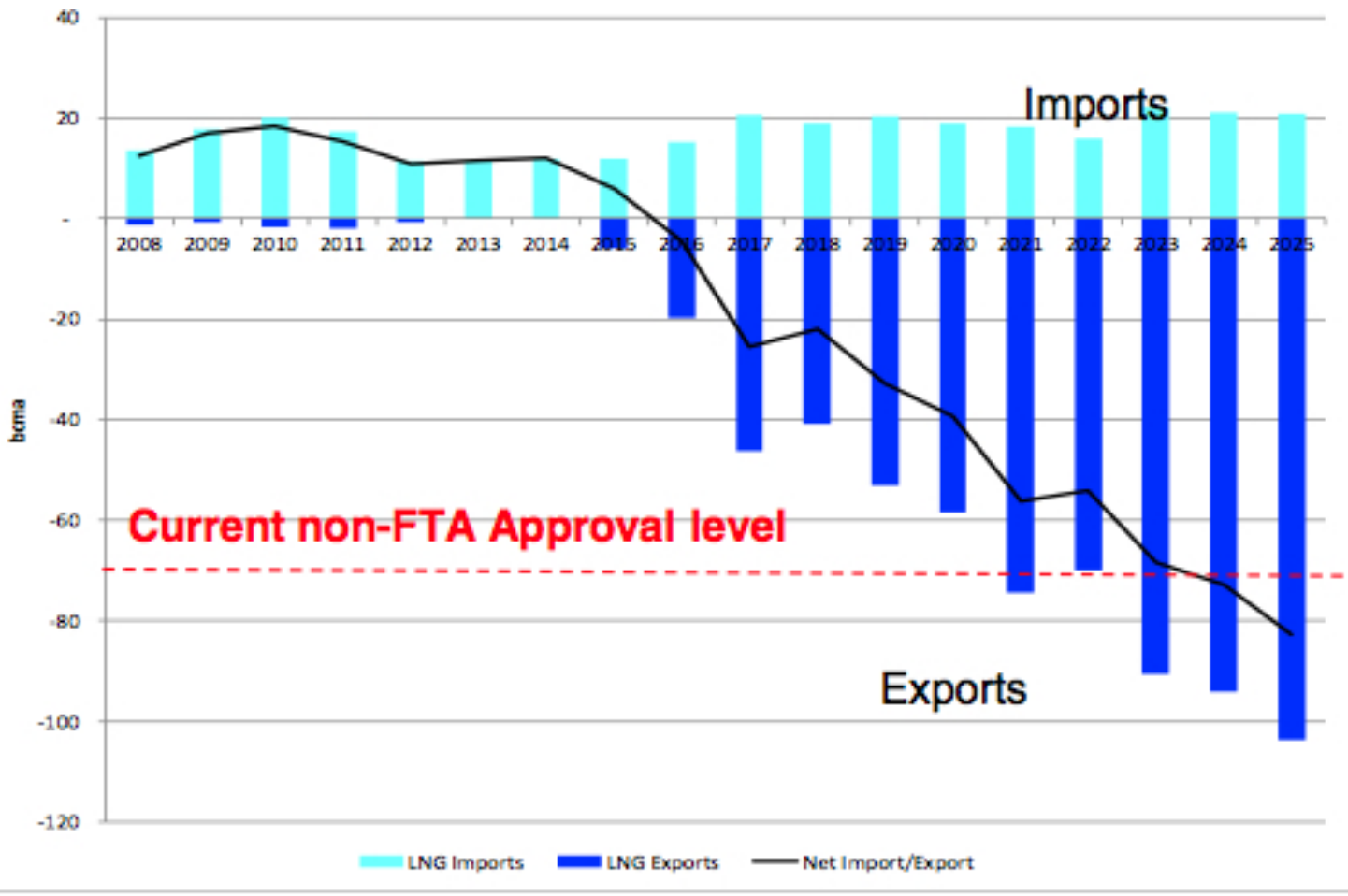
Source: IEA WEO 2014

LNG Supply (Excluding North America)

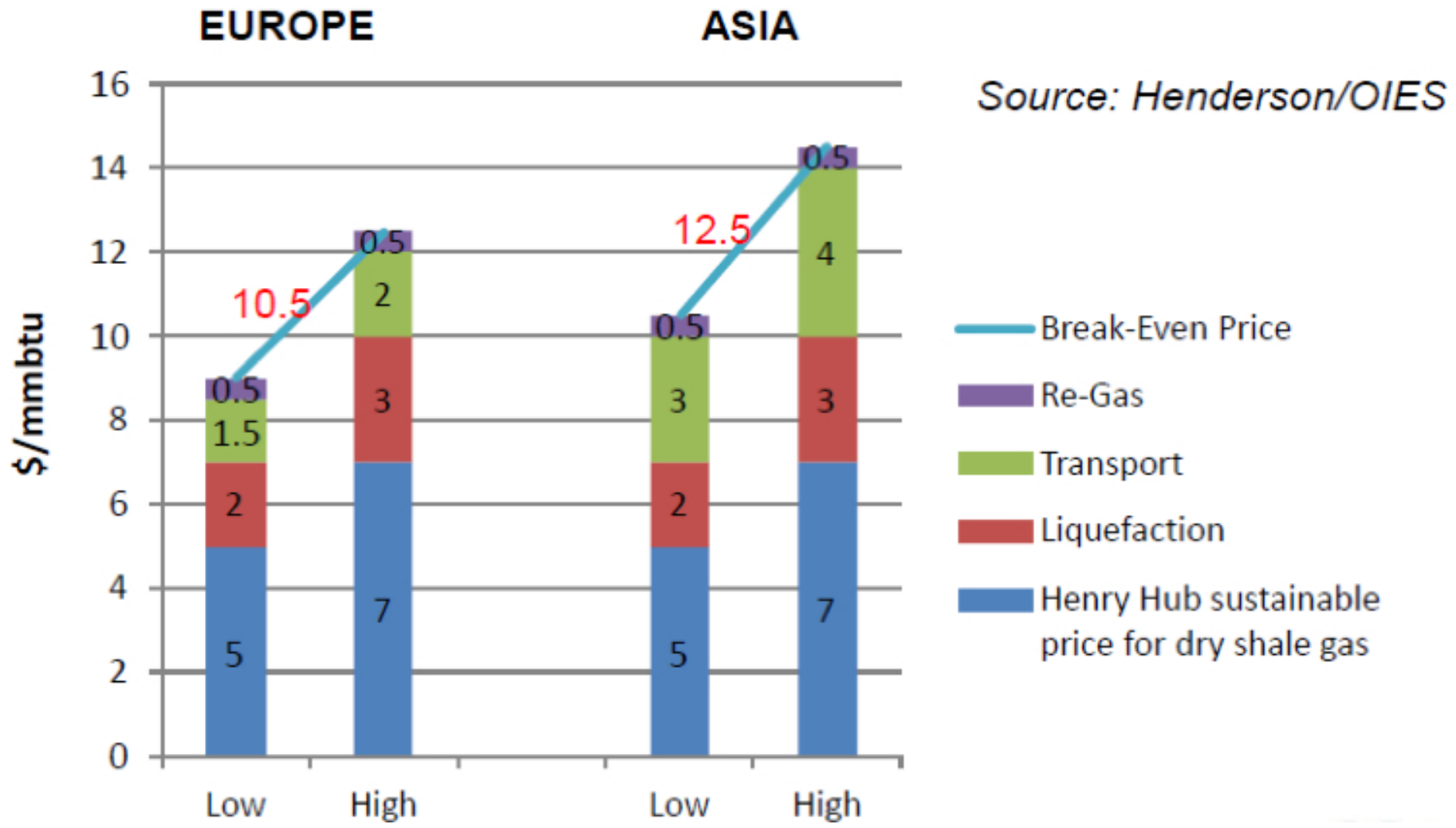


Source: Oxford Institute for Energy Studies

North American LNG Imports and Exports to 2025

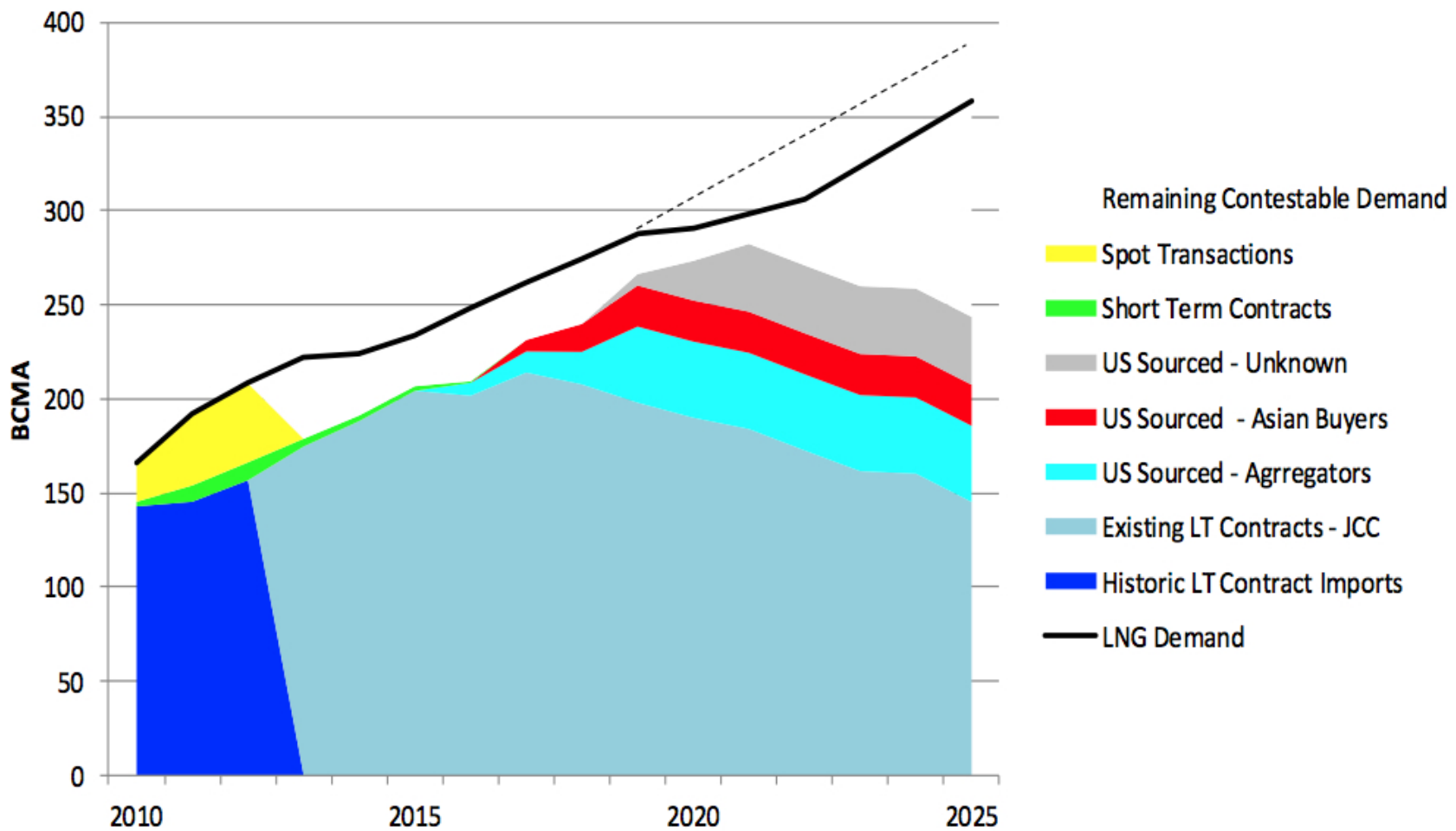


Break-even Destination Market Prices for US LNG to Europe and Asia



Source: Henderson (2013) and OIES

Asian Future LNG pricing trends to 2025



2015 World Gas Conference



26th

WORLD GAS CONFERENCE
PARIS FRANCE
1 - 5 june 2015

