

Danish Annual Gas Conference 2013

The Global Gas Strategy: the IGU way

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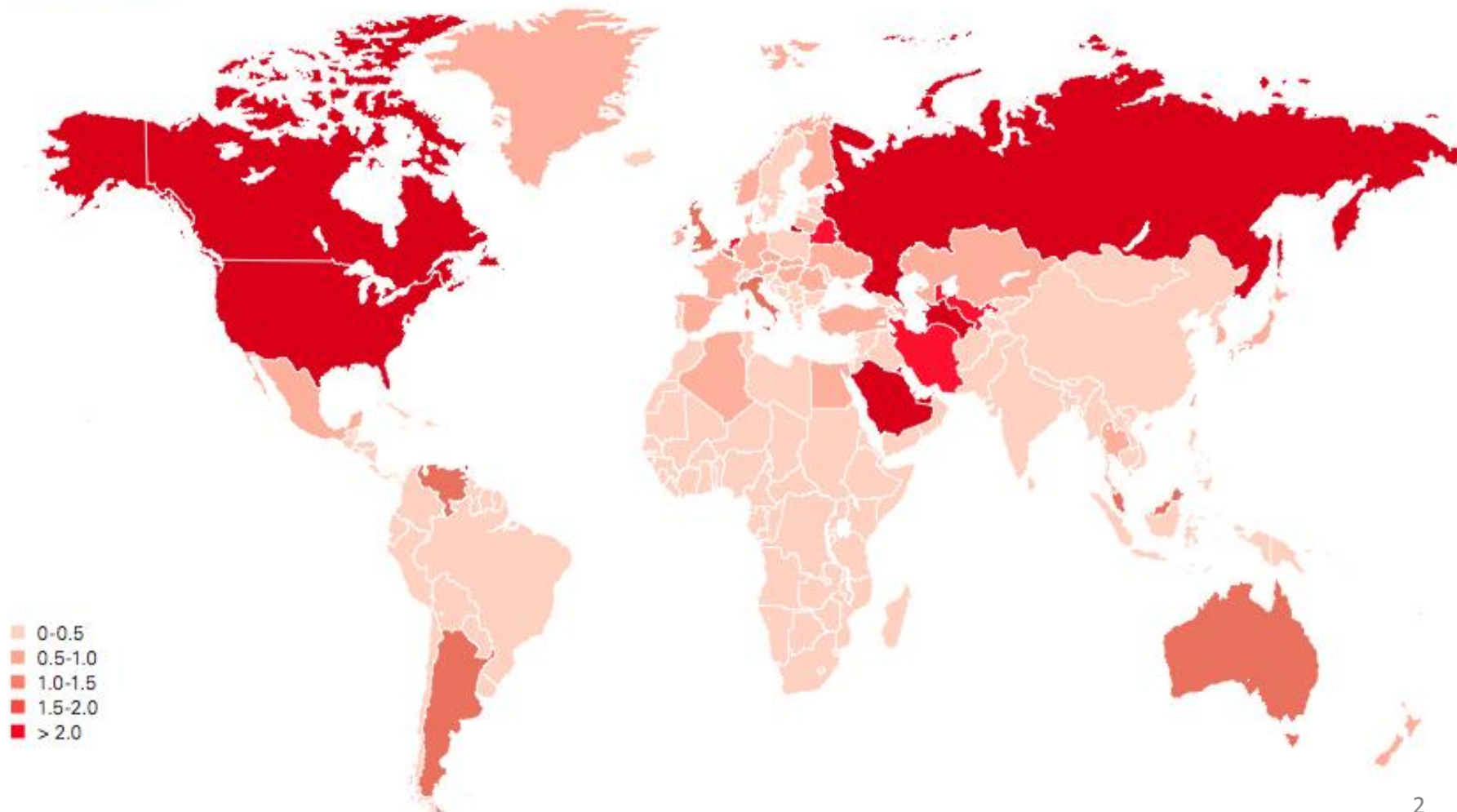
Président IGU

Natural gas: a global market under construction

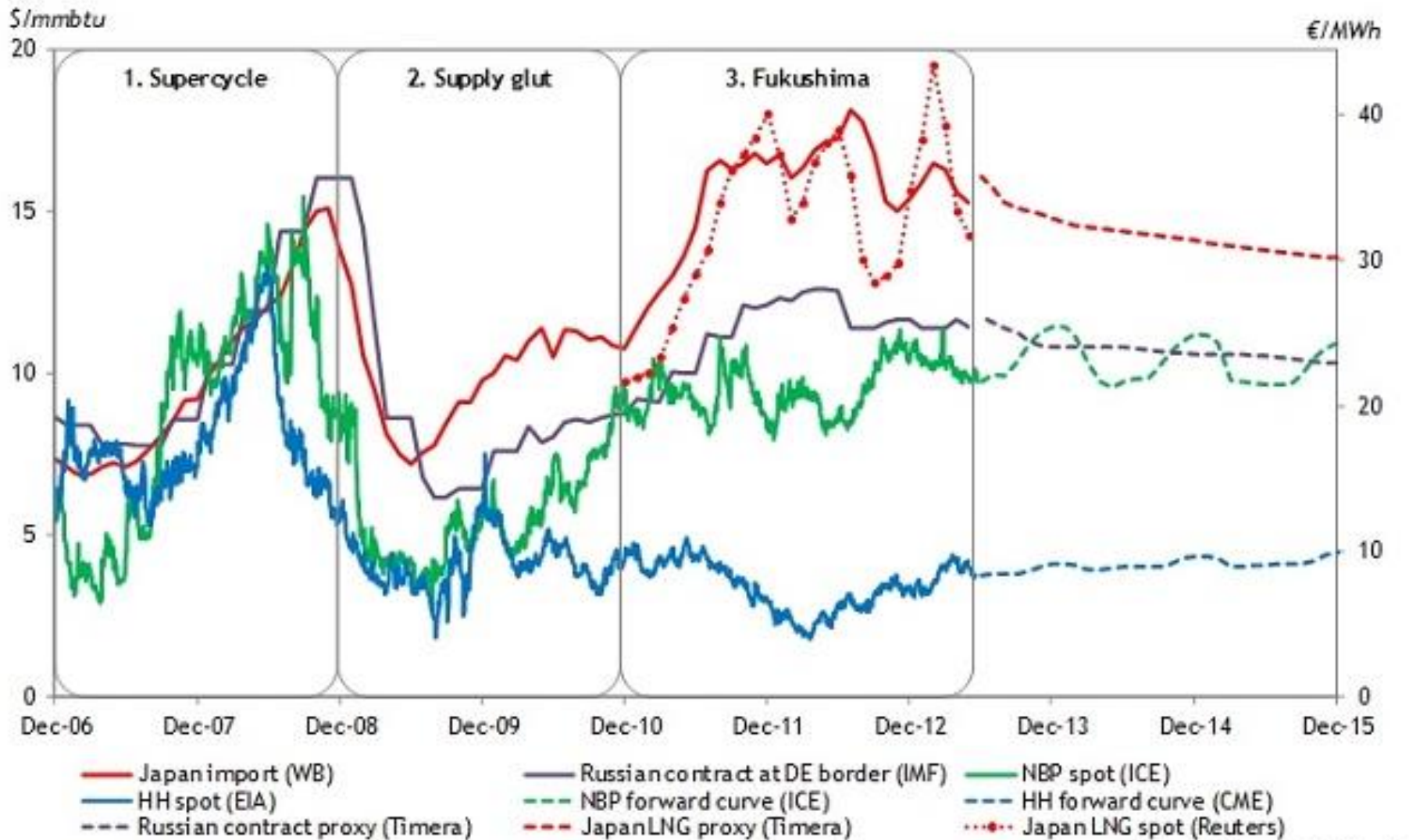
Source: BP Statistical Review 2013

Consumption per capita 2012

Tonnes oil equivalent



Natural gas prices in Asia, Europe and the USA

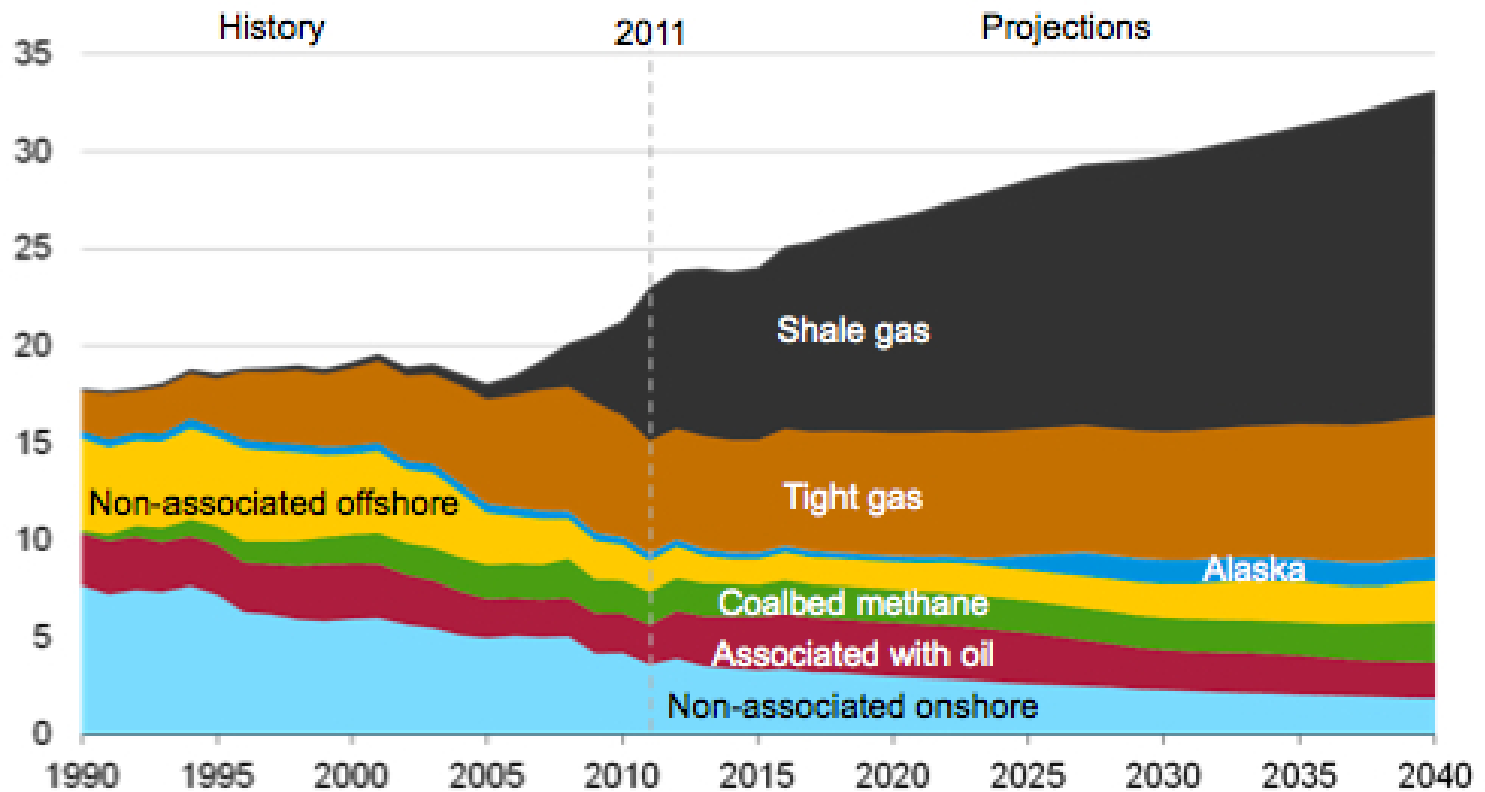


Forward prices as at 20 Jun 13

Shale gas leads growth of production in the USA

Source: EIA

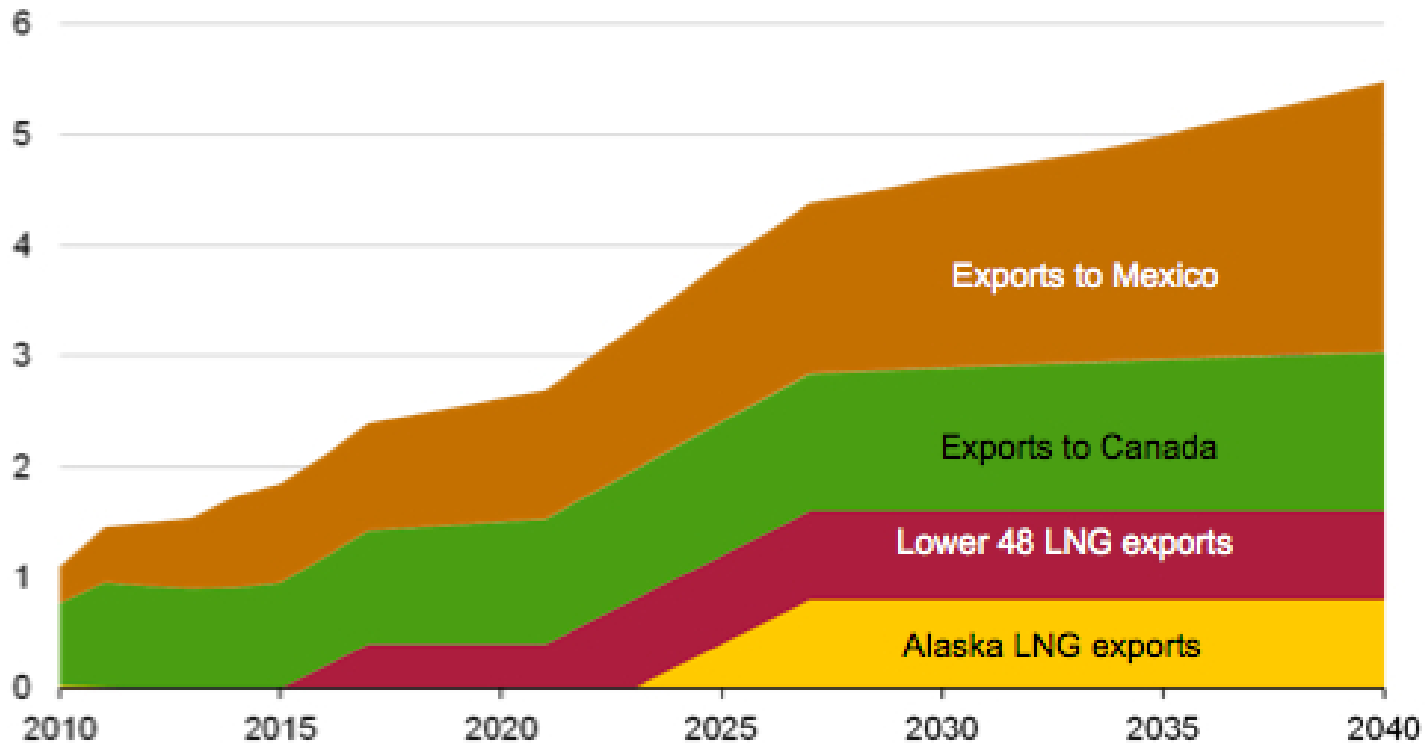
U.S. dry natural gas production
trillion cubic feet



Natural gas and LNG exports from the USA

Source: EIA

U.S. natural gas exports
trillion cubic feet

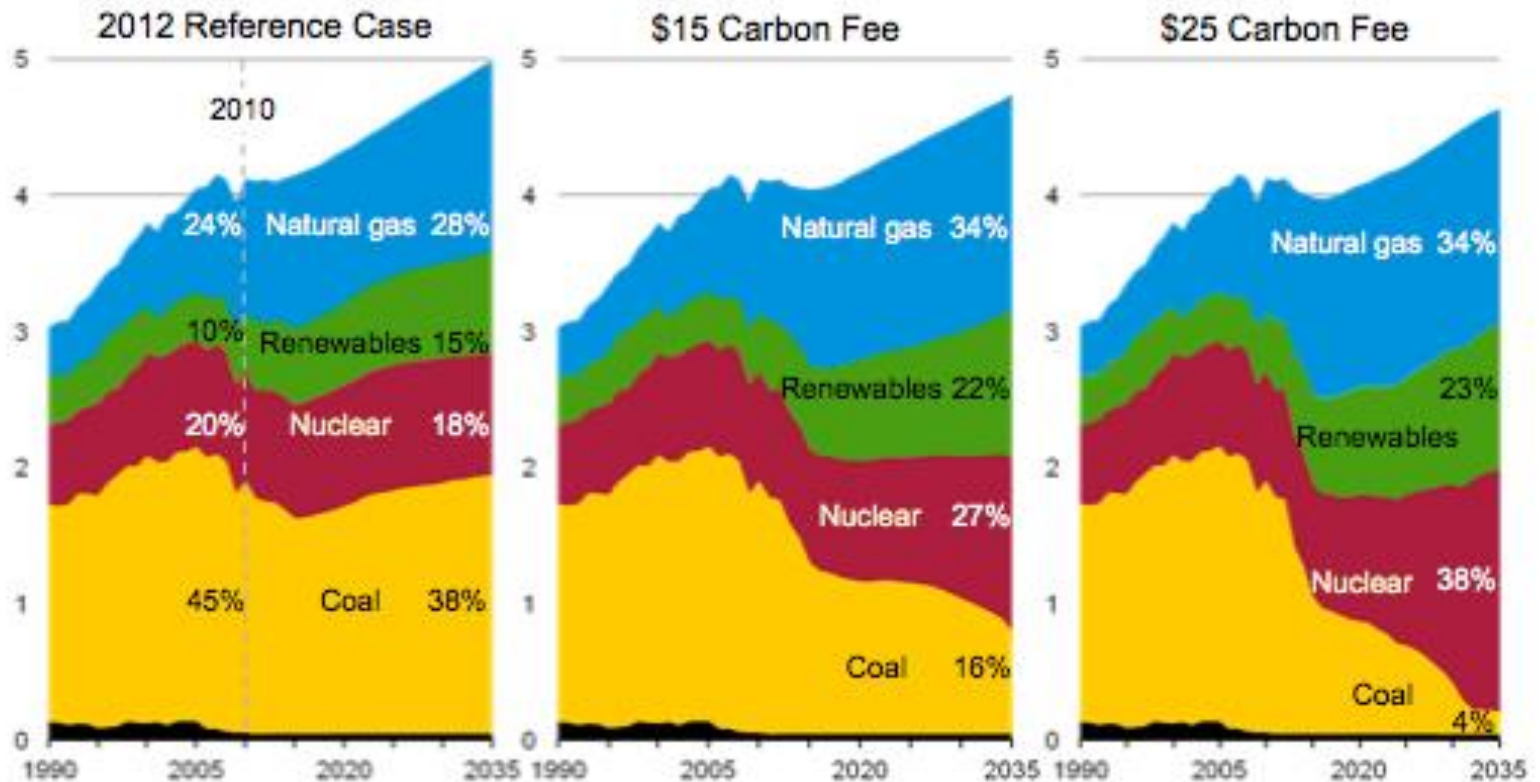


Source: EIA, Annual Energy Outlook 2013 Early Release

Changing the electricity generation mix in the USA

Source: EIA

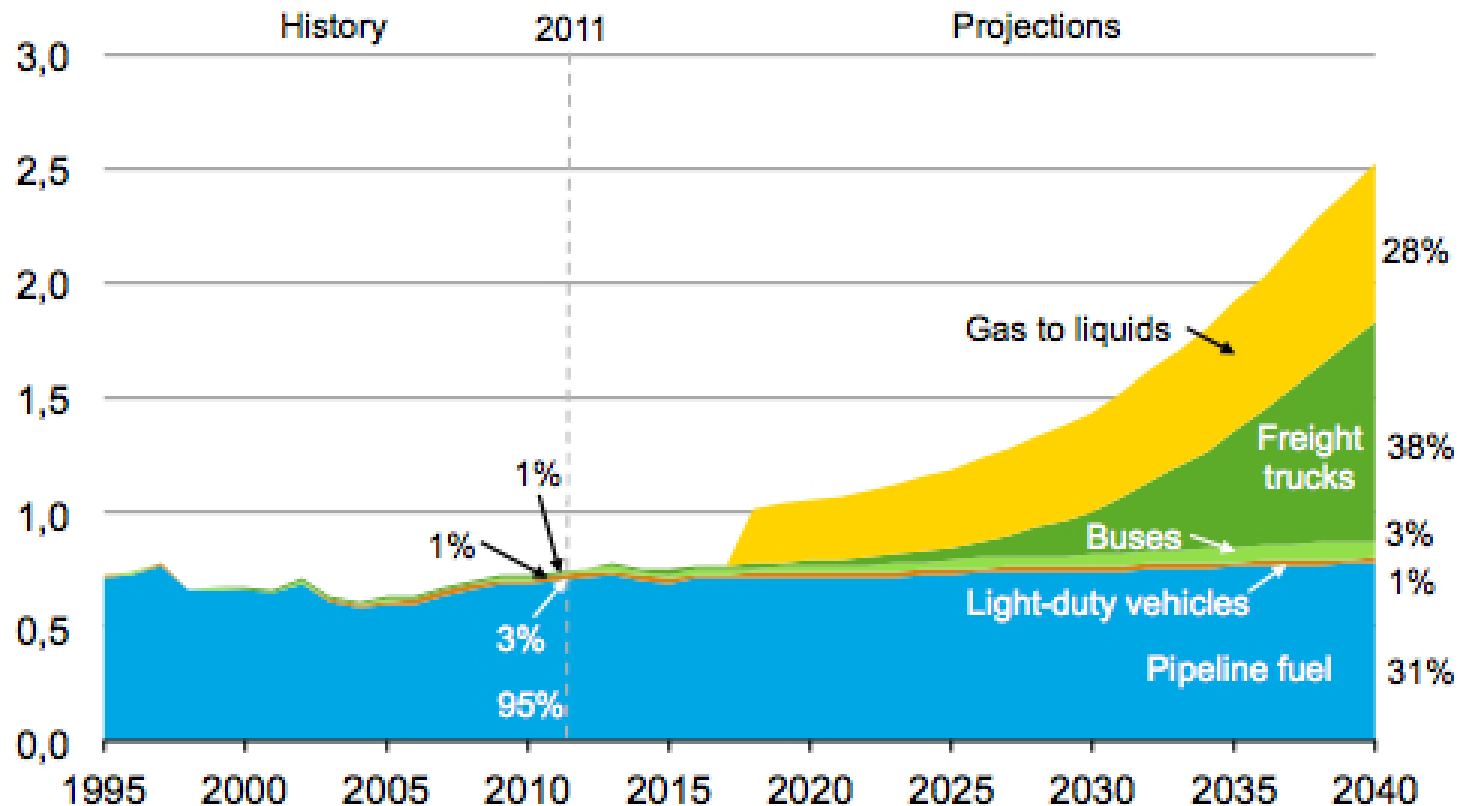
U.S. electricity net generation
trillion kilowatthours



Source: EIA Annual Energy Outlook 2012

The growth of LNG and GTL uses for transportation in the USA

U.S. natural gas consumption
quadrillion Btu



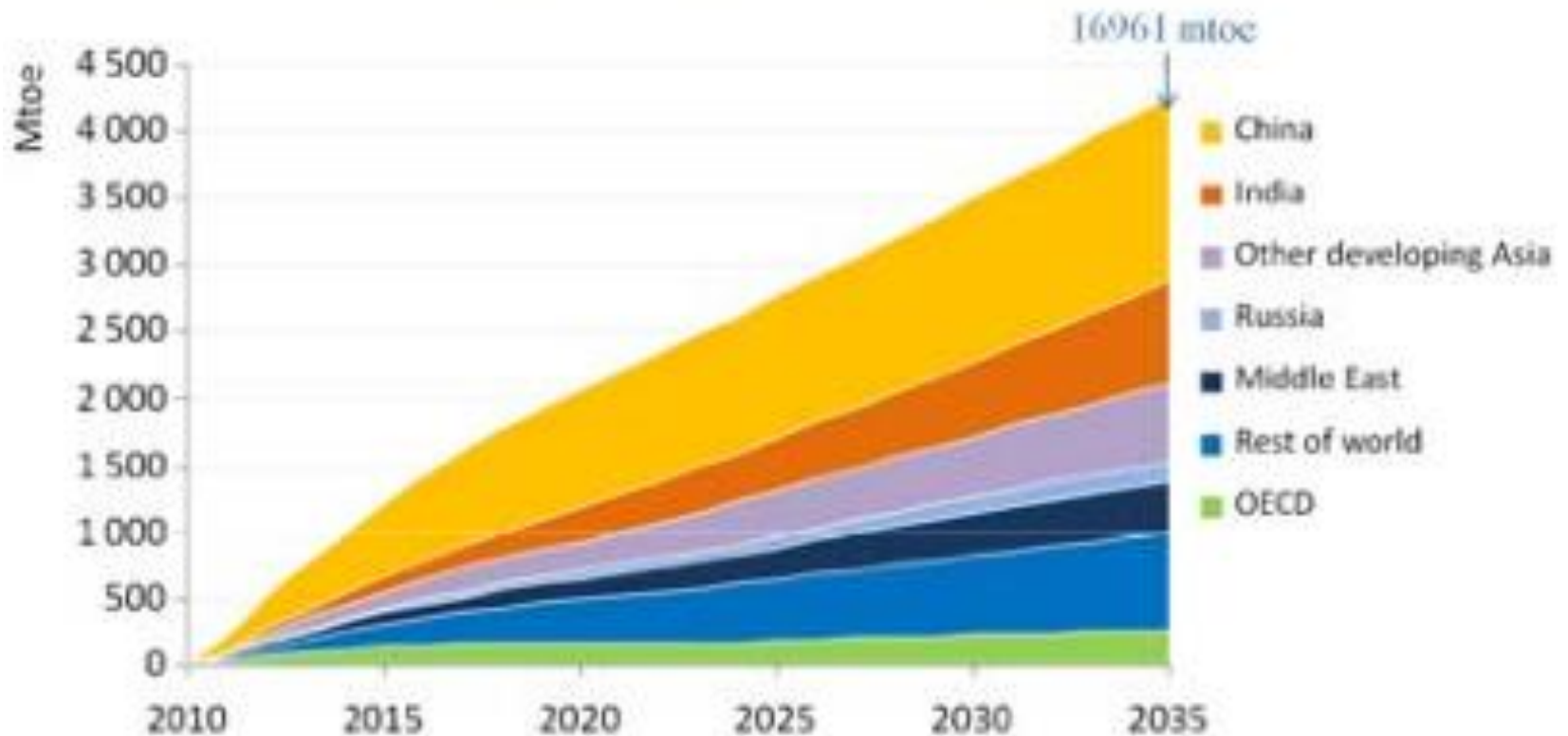
Note: Gas to liquids includes heat, power, and losses.

Source: EIA, Annual Energy Outlook 2013 Early Release

Emerging economies, mainly Asia, drive the energy demand

Source: IEA

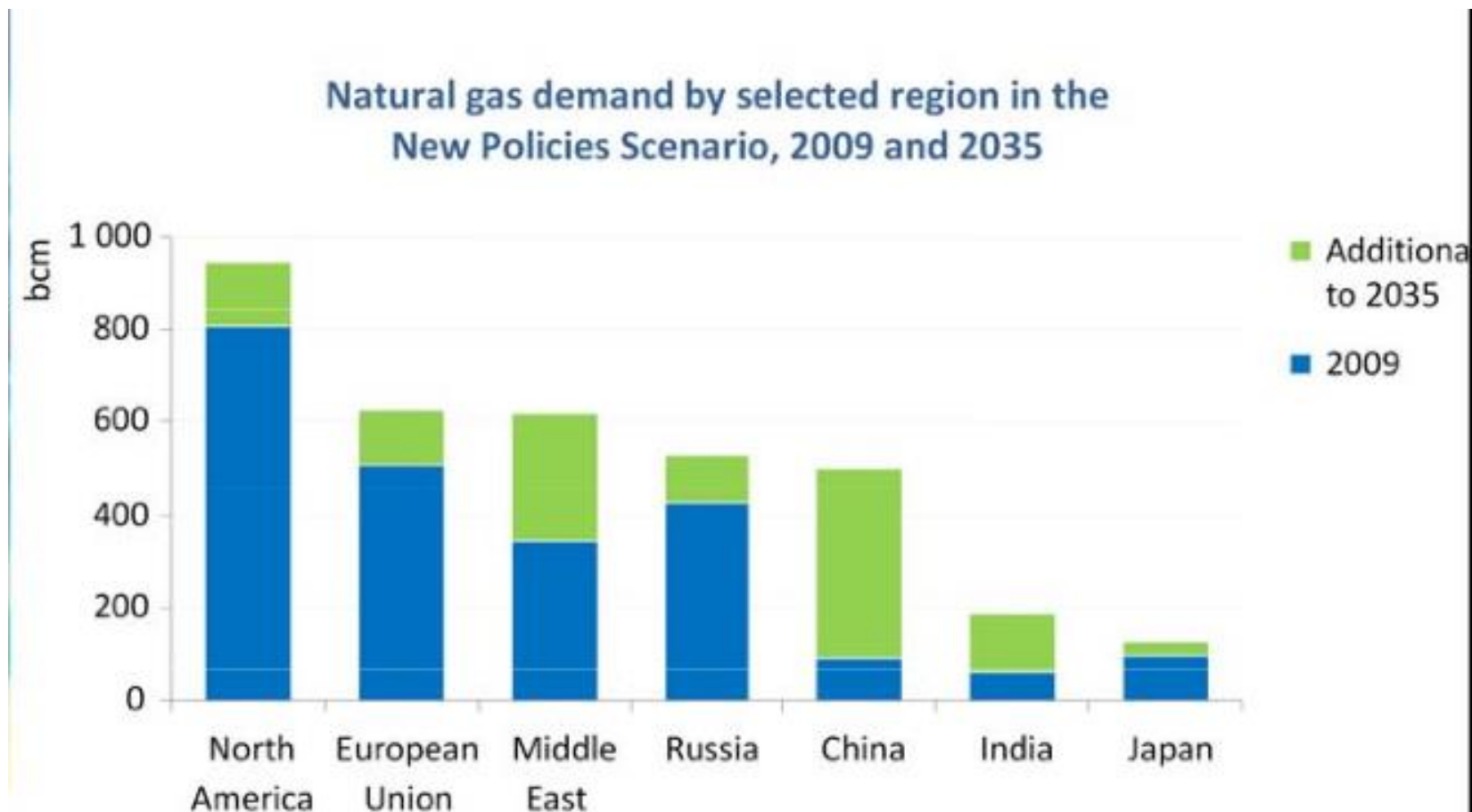
Growth in primary energy demand - by region



- Global energy demand increases by one-third from 2010 to 2035, with China & India accounting for 50% of the growth

Natural gas demand growth comes mainly from Asia

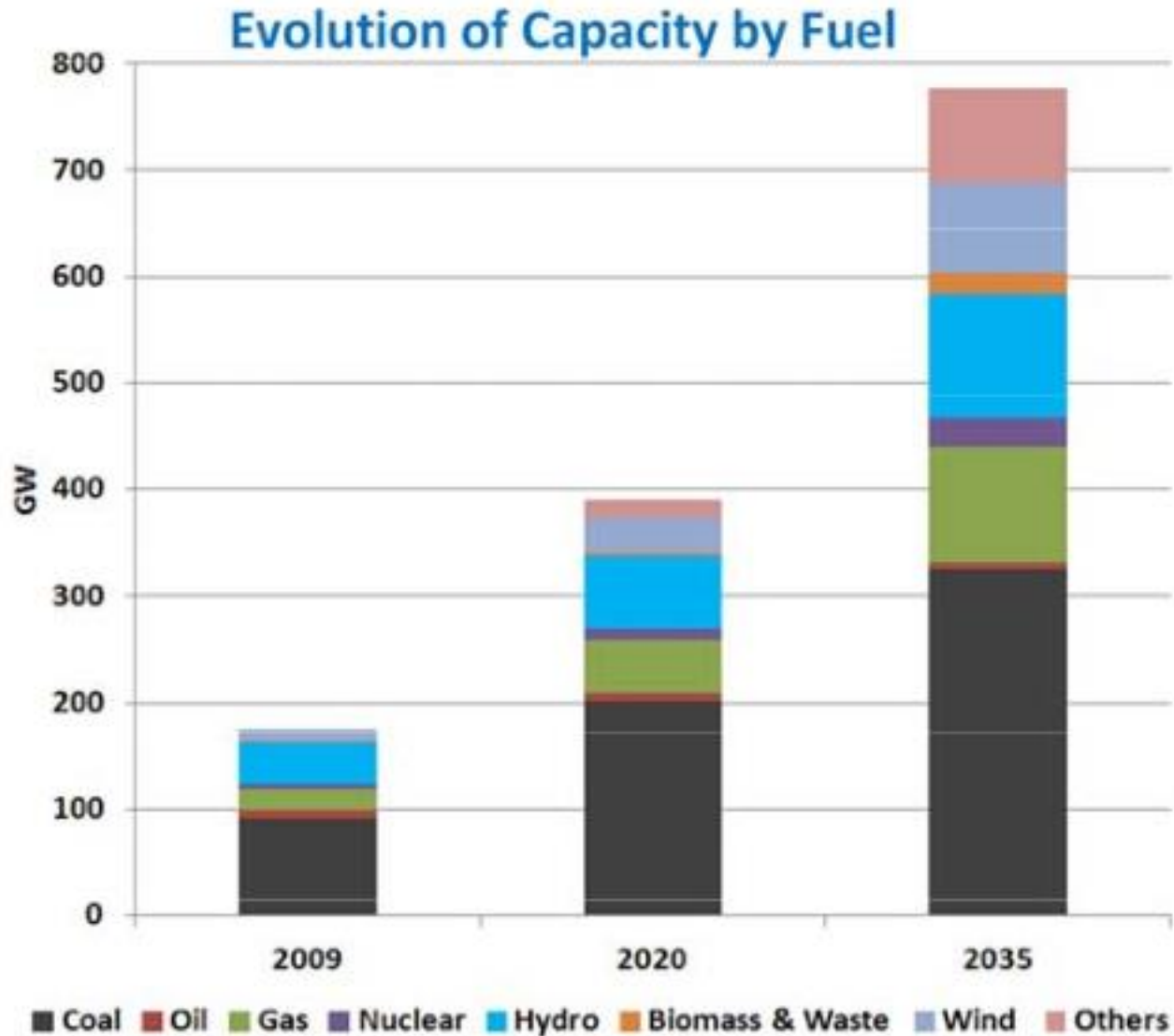
Source: IEA



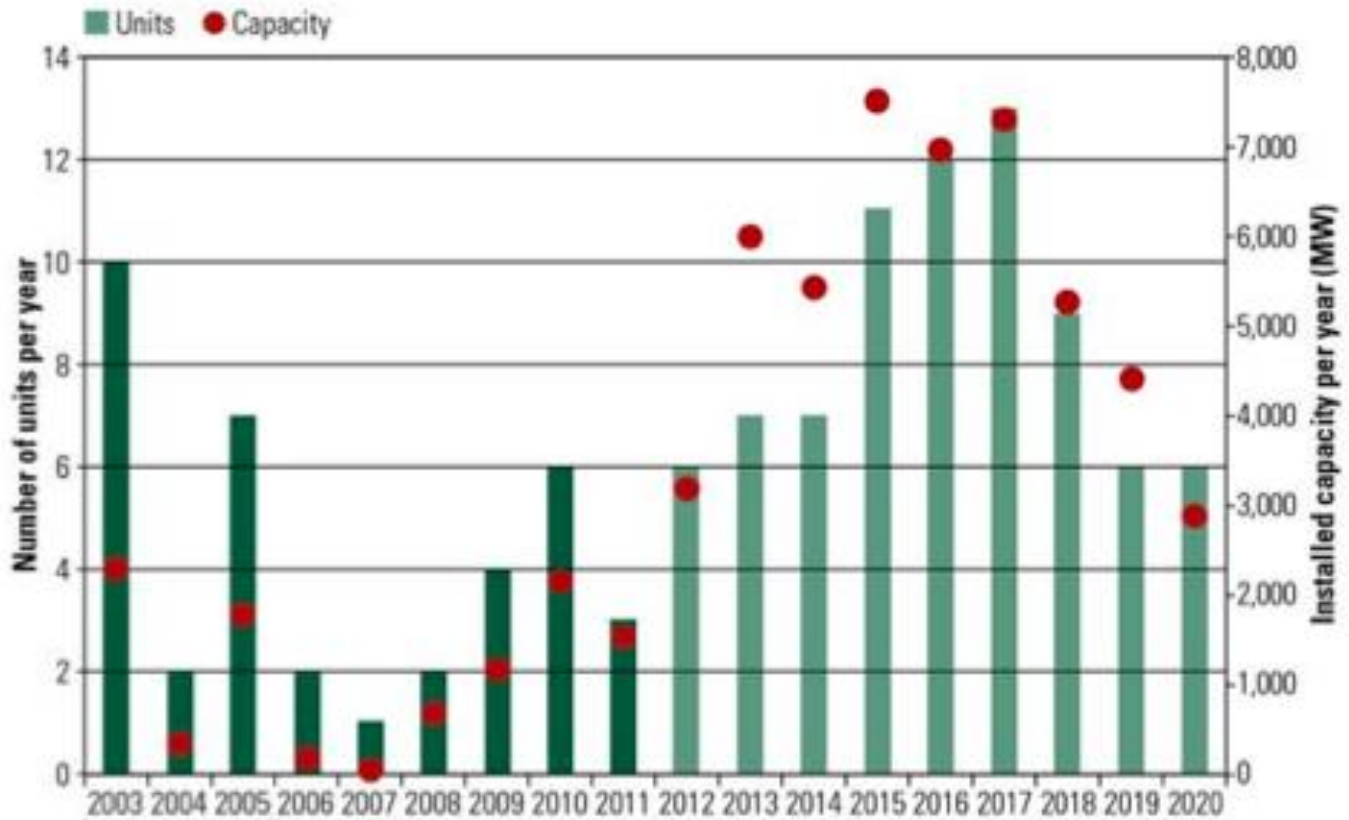
Gas demand grows fastest in the non-OECD regions, led by China, which accounts for more than a quarter of the worldwide increase in demand between 2009 & 2035

Power capacity projections in India (GW)

Source: IEA



New coal-fired power capacities in Europe



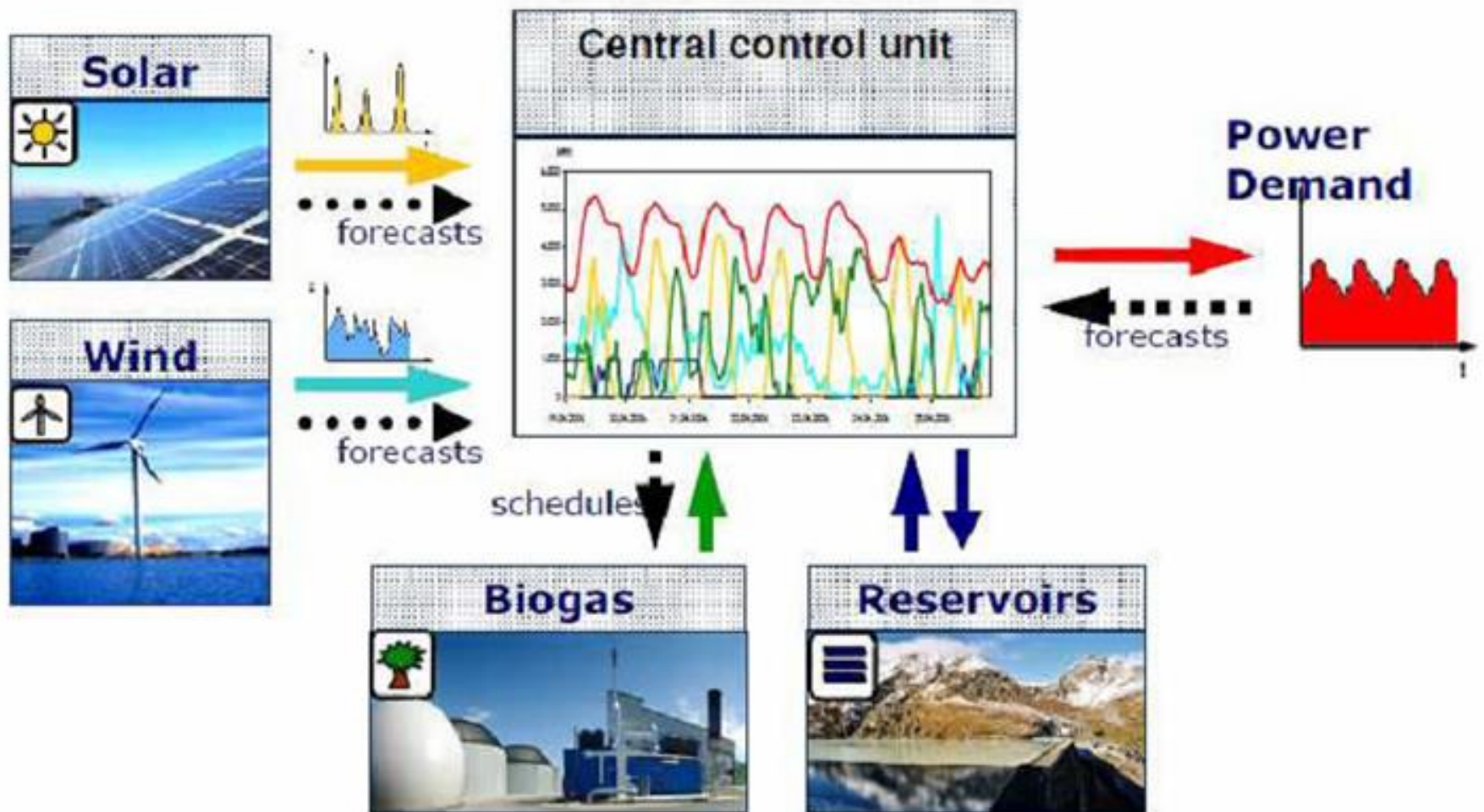
Source: Ecoprog GmbH.²²

The UK Emissions Performance Standards (EPS)

Energy Bill 2012 - 2013

- **EPS requires that any new coal fired power plant demonstrate CCS on at least 300 MW of the proposed generating capacity**
- **Sets a CO2 emission limit at 450 g/kWh until 2045**
- **Guarantees stability of emission regulation until 2045 (grandfathering)**
- **EPS complements the economic signals provided by the Carbon Floor Price and, when applicable, the feed-in electricity purchase tariff with Contract for Difference (CFD)**
- **EPS gives incentives to « Good Quality » CHPs, by discounting the volumes of CO2 saved in the heat production by displacing other fossil fuels**

Synergy between smart gas and electricity grids



Energy poverty is widespread

SOURCE: IEA

