Global Economy and Cooperation

Gasex 2012
Jérôme Ferrier, President IGU
CONSUMPTION OF PRIMARY ENERGY BY SOURCE

World

- Oil: 33%
- Natural gas: 24%
- Coal: 30%
- Nuclear: 5%
- Hydro: 6%
- Renewables: 2%

Asia Pacific

- Oil: 27%
- Natural gas: 11%
- Coal: 53%
- Nuclear: 2%
- Hydro: 5%
- Renewables: 1%

Source: BP Statistical Review 2012

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PROVED CONVENTIONAL GAS RESERVES

Source: BP Statistical Review 2012
PRODUCTION AND CONSUMPTION OF NATURAL GAS
1986 to 2011 (Bcm)

Source: BP Statistical Review 2012
Gasex 2012
### Main Conventional Gas Resources in Asia-Pacific

<table>
<thead>
<tr>
<th>Country</th>
<th>Reserves (Bcm)</th>
<th>R/P</th>
<th>Production (Bcm/y)</th>
<th>Consumption (Bcm/y)</th>
<th>Δ (Bcm/y)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>3 800</td>
<td>84</td>
<td>45</td>
<td>25.6</td>
<td>+19.4</td>
</tr>
<tr>
<td>China</td>
<td>3 100</td>
<td>30</td>
<td>102.5</td>
<td>130.7</td>
<td>-28.2</td>
</tr>
<tr>
<td>Indonesia</td>
<td>3 000</td>
<td>40</td>
<td>75.6</td>
<td>37.9</td>
<td>+37.7</td>
</tr>
<tr>
<td>Malaysia</td>
<td>2 400</td>
<td>38</td>
<td>61.8</td>
<td>28.5</td>
<td>+33.3</td>
</tr>
<tr>
<td>India</td>
<td>1 200</td>
<td>26</td>
<td>46.1</td>
<td>61.1</td>
<td>-15</td>
</tr>
</tbody>
</table>

*Source: BP Statistical Review 2012*
AUSTRALIAN GAS PRODUCTION GROWTH
Bcm

Source: IEA 2011

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### MAIN CONVENTIONAL GAS RESOURCES AVAILABLE

<table>
<thead>
<tr>
<th>Country</th>
<th>RESERVES (Bcm)</th>
<th>R/P (Bcm/y)</th>
<th>PRODUCTION (Bcm/y)</th>
<th>CONSUMPTION (Bcm/y)</th>
<th>Δ (Bcm/y)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUSSIA</td>
<td>44 600</td>
<td>73</td>
<td>607</td>
<td>424,6</td>
<td>+182,4</td>
</tr>
<tr>
<td>IRAN</td>
<td>33 100</td>
<td>218</td>
<td>151,8</td>
<td>153,3</td>
<td>-1,5</td>
</tr>
<tr>
<td>QATAR</td>
<td>25 000</td>
<td>170</td>
<td>146,8</td>
<td>23,8</td>
<td>+123</td>
</tr>
<tr>
<td>TURKMENISTAN</td>
<td>24 300</td>
<td>408</td>
<td>59,5</td>
<td>25</td>
<td>+34,5</td>
</tr>
</tbody>
</table>
ESTIMATES OF TECHNICALLY ACCESSIBLE SHALE GAS RESERVES (Tcf)

- Brazil: 226 Tcf
- Argentina: 774 Tcf
- Mexico: 681 Tcf
- United States: 862 Tcf
- Canada: 388 Tcf
- Poland: 187 Tcf
- France: 180 Tcf
- Algeria: 231 Tcf
- Libya: 290 Tcf
- China: 1275 Tcf
- Australia: 396 Tcf

Source: EIA/ARI, 2011
Gas demand grows fastest in the non-OECD regions, led by China, which accounts for more than a quarter of worldwide increase in demand between 2009 & 2035.
MAJOR GAS AND LNG TRADE MOVEMENTS IN 2011

Source: Includes data from Cedigaz, GIIGNL, CISStat Poten, Waterborne
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GAS PIPELINES

Source: IHS

Shtockman LNG

TURKMENISTAN: PR = 24 Tcm

100 Bcm/y

Sakhalin LNG: 11 Mt/y

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INDONESIA – Trade flows in 2010

Source: data from WTO

Imports: 135 GUSD
Exports: 158 GUSD

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AUSTRALIA – Trade flows in 2010

Source: data from WTO

Imports: 201 GUSD
Exports: 212 GUSD

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IGU Members in Asia

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Strategic vision 2012 – 2015
TWP and the 4 pillars

“Growing together towards a friendly planet”

You can download the complete TWP:
Thank you for your attention