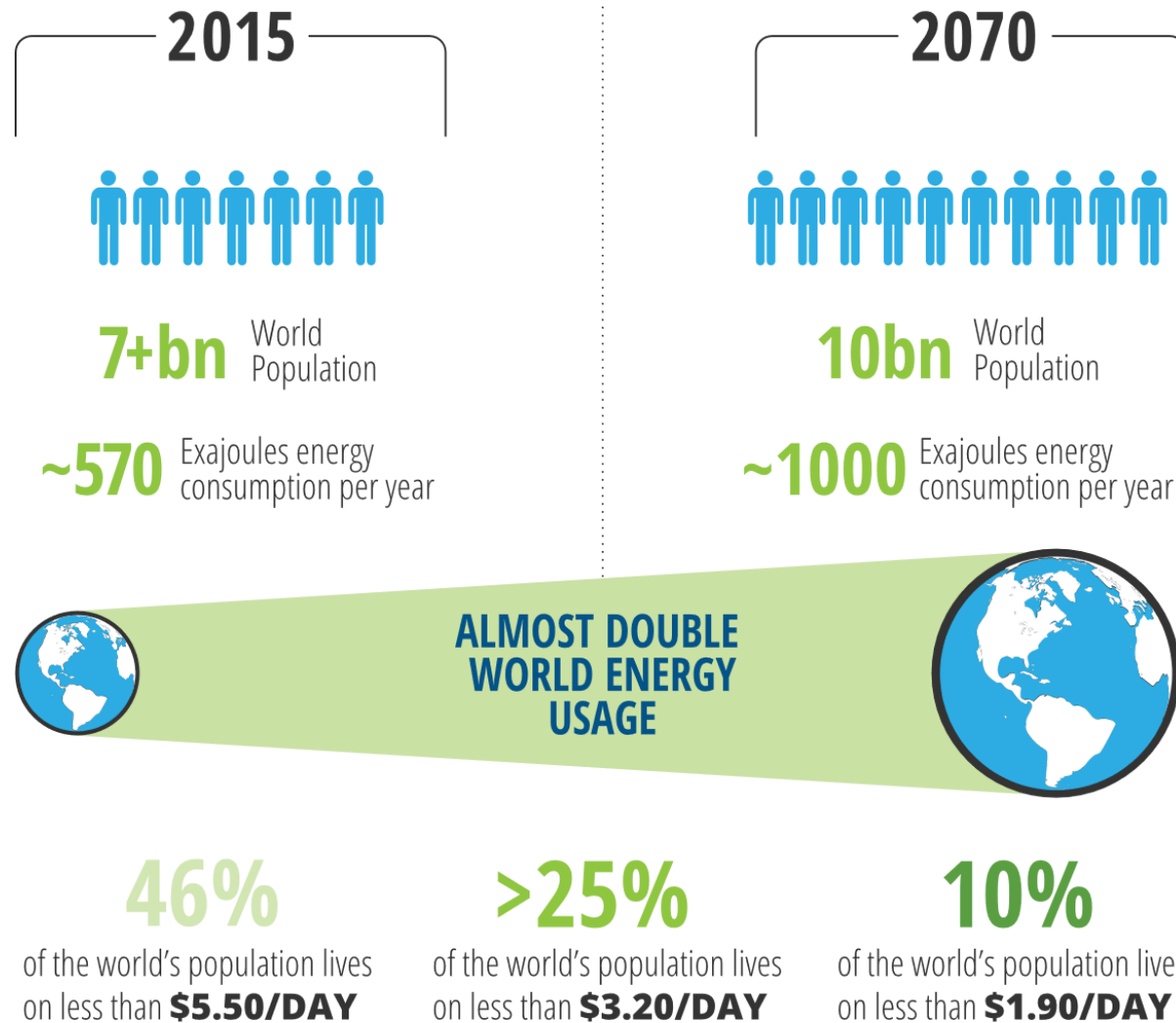




**Global Gas Update**

**INGAS 2019**

# Solving the Trilemma



# Top global gas trends in 2018

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**+4.9%**

**Global production  
& consumption  
growth**

**-\$2.1  
/MMbtu**

**Change in  
average gas price  
at key global  
hubs<sup>1</sup>**

**+4.1%**

**International  
pipeline & LNG  
trade growth**

**+143  
BCMA**

**Gas import &  
export capacity  
growth**

# The Future Can be Bright for Gas



**Cost Competitiveness**



**Sustainability**



**Security of Supply**



**Technology & Innovation**

Forecasts of 2040 primary energy demand mix

