Global Gas Update

INGAS 2019
Solving the Trilemma

2015

- 7+bn World Population
- ~570 Exajoules energy consumption per year

2070

- 10bn World Population
- ~1000 Exajoules energy consumption per year

Almost double world energy usage

46% of the world’s population lives on less than $5.50/DAY

>25% of the world’s population lives on less than $3.20/DAY

10% of the world’s population lives on less than $1.90/DAY

A Sustainable Future – Powered by Gas
Top global gas trends in 2018

- **+4.9%**
  Global production & consumption growth

- **-$2.1/MMbtu**
  Change in average gas price at key global hubs\(^1\)

- **+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

- **Nuclear**: 25.0%
- **Renewables**: 23.6%
- **Gas**: 25.0%
- **Coal**: 20.1%
- **Oil**: 26.5%

#### Key Drivers:
- **R&D**
- **Cost Competitiveness**
- **Sustainability**
- **Security of Supply**
- **Technology & Innovation**

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