Danish Annual Gas Conference 2013

The Global Gas Strategy: the IGU way

Jérôme Ferrier
Président IGU
Natural gas: a global market under construction

Source: BP Statistical Review 2013
Natural gas prices in Asia, Europe and the USA
Shale gas leads growth of production in the USA

Source: EIA
Natural gas and LNG exports from the USA

Source: EIA

Source: EIA, Annual Energy Outlook 2013 Early Release
Changing the electricity generation mix in the USA

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

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

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

Natural gas demand by selected region in the New Policies Scenario, 2009 and 2035

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*