


2006
HGU



MEGA TRENDS IN GAS DEMAND

FLAVIA DI CINO



World Gas Conference – Amsterdam
Gas: Meeting the Expectations
15.30 -17.30 hs - June 8th 2006



PGC B 3

DEMAND REPORT



IGU 2003 DEMAND PROJECTIONS

Key Results

	2000		2030
Gas Demand tcm/y	2.4	→	4.8
Share of Gas in Primary Energy	23 %	→	27%
Gas to Power Demand tcm/y	0.7	→	1.8
Share of Power Generation in Total Gas Demand	30 %	→	38%



tcm/y = 10^{12} cubic meters/year

TWP 2003 -2006



COMPARISON AMONG PROJECTIONS

IGU – Demand Prospects – Base Case 2003	---
IGU – Demand Prospects – Base Case 2000	▲
IGU – Demand Prospects – Base Case 1997	●
IEA – World Energy Outlook – Reference Case 2005	■
IEA – World Energy Outlook – Reference Case 2004	●
IEA – World Energy Outlook – Reference Case 2002	◆
U.S. DOE – Int. Energy Outlook – Base Case 2005	■
U.S. DOE – Int. Energy Outlook – Base Case 2004	●
U.S. DOE – Int. Energy Outlook – Base Case 2002	◆
IGU – Sensitivity – High and Low Case 2003	—

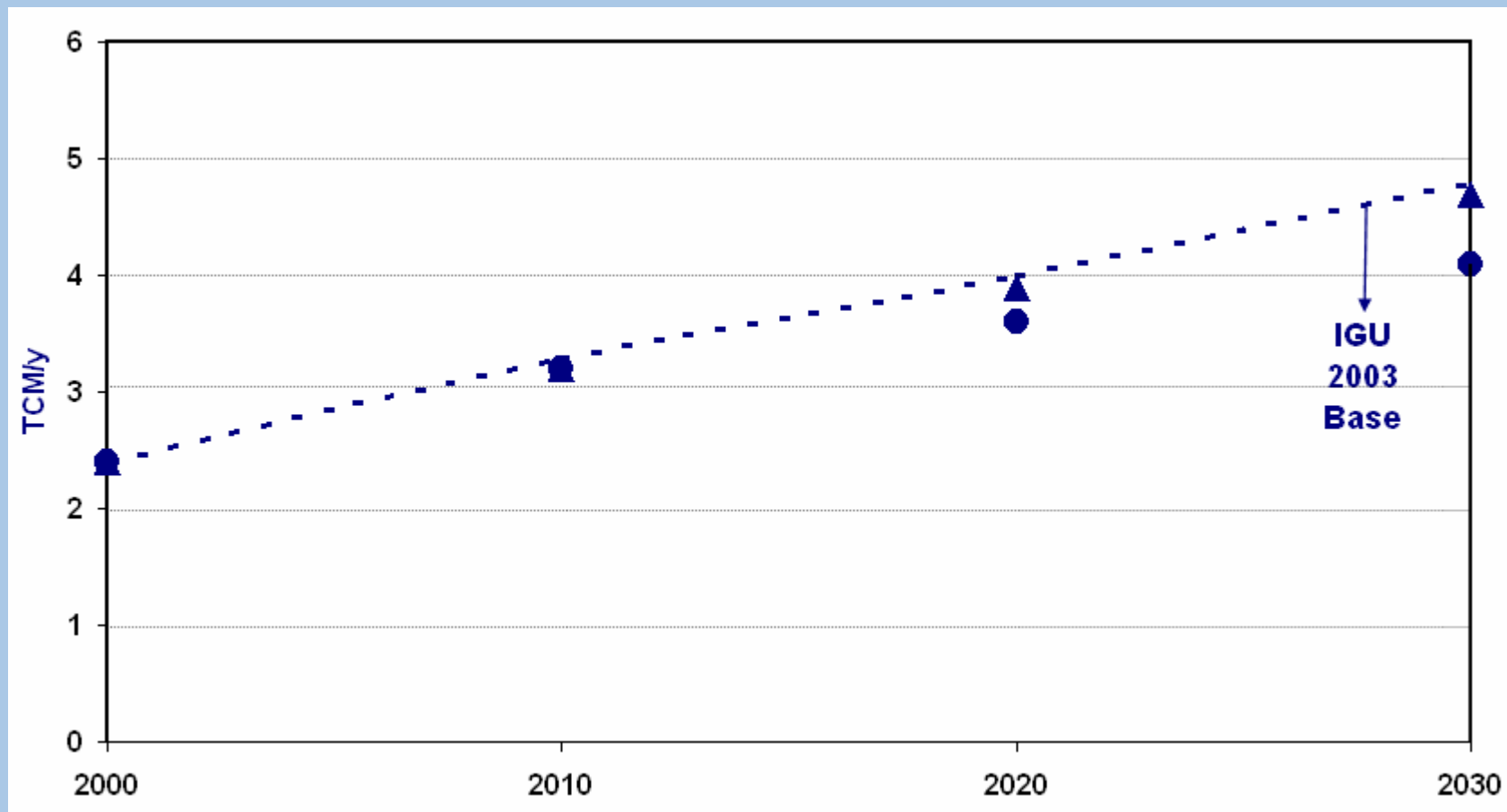


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COMPARISON AMONG PROJECTIONS

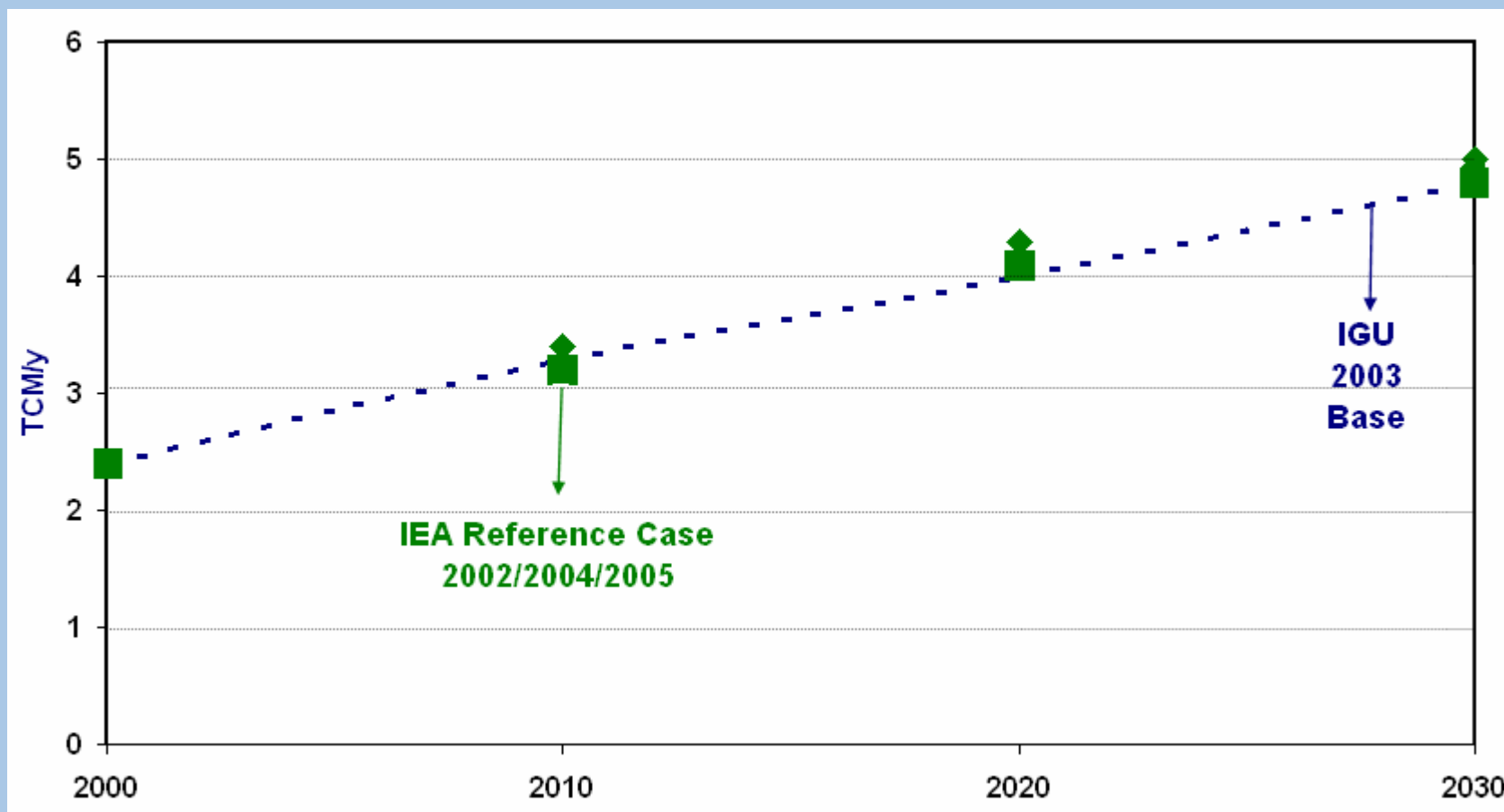
IGU – Base Case



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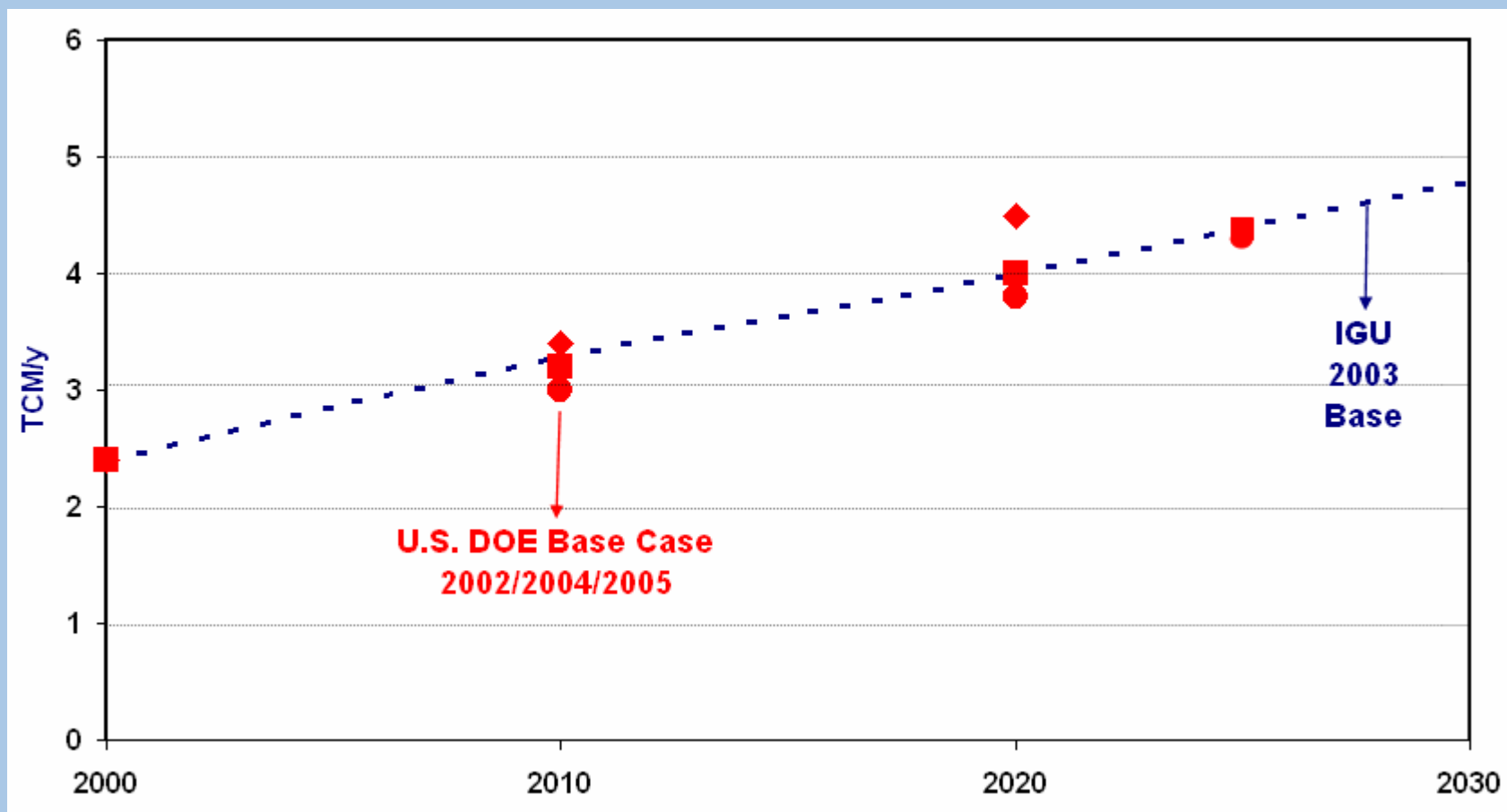
COMPARISON AMONG PROJECTIONS IGU – IEA



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COMPARISON AMONG PROJECTIONS IGU – U.S. DOE

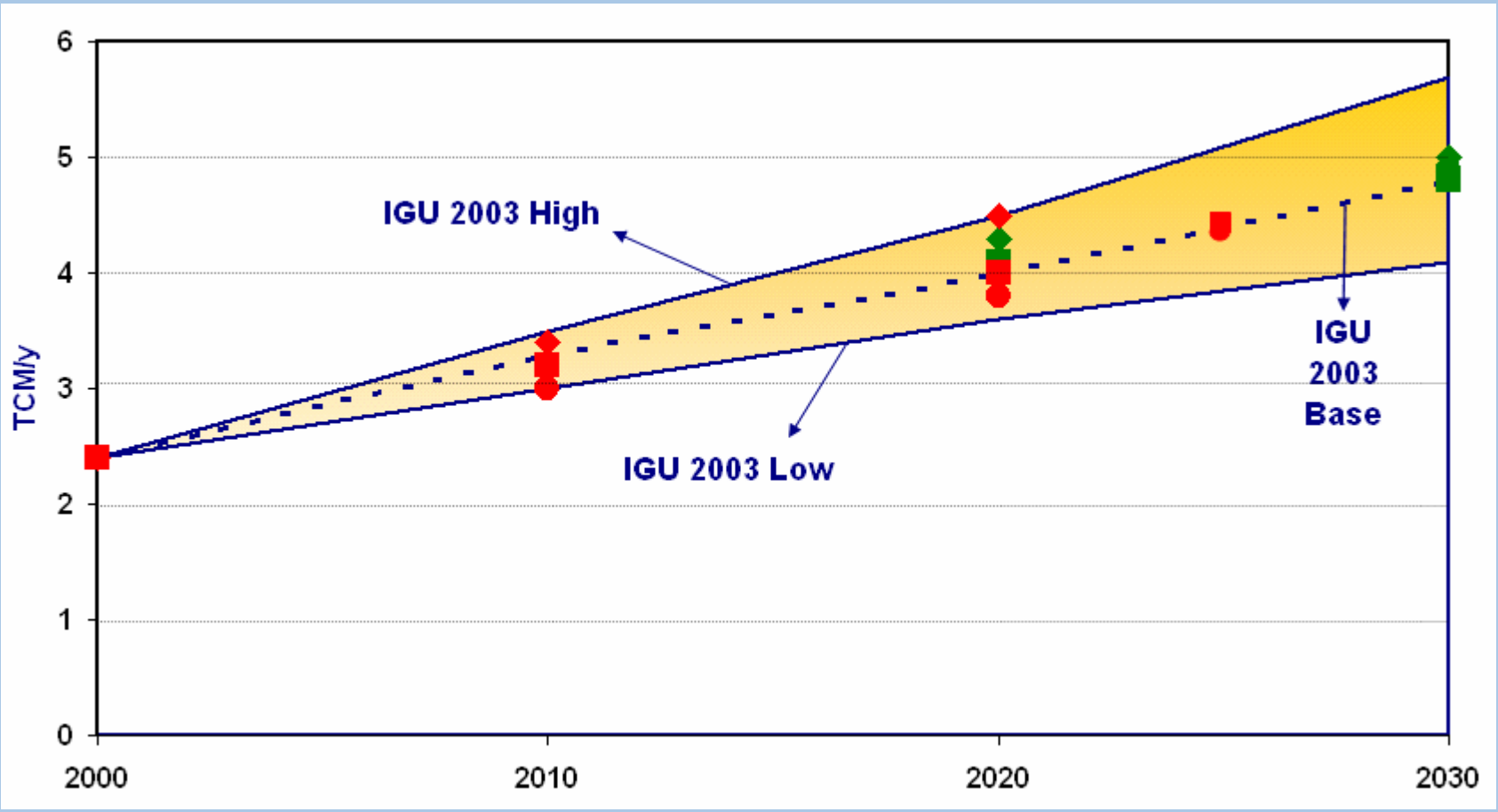


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COMPARISON AMONG PROJECTIONS

All in all



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MACRO ASSUMPTIONS – Base Cases

Worldwide (Avg. Annual) Population GDP
Forecasted Period

IGU	'03	1%	2,6%
	'02	1%	3%
IEA-WEO	'04	1%	3,2%
	'05	0,9%	n/a
	'02	1,1%	3,2%
DOE-IEO	'04	1%	3,0%
	'05	1%	3,9%





KEY PRICE ASSUMPTIONS

IGU

- Natural gas as preferred option for power generation.

IEA

2005 version		2010	2020	2030
OIL (us\$/bbl)	OECD	35	37	39
	US	5.8	5.9	6.2
GAS (us\$/MMbtu)	EU	5.0	5.2	5.6
	Japan	6.0	6.1	6.2
COAL (us\$/tonne)	OECD	49	50	51

DOE

- Crude oil price by the end of the forecasted period was increased from 25 us\$/bbl in 2002v. to 27 us\$/bbl in 2004v. and 35 us\$/bbl in 2005v. expressed in year 2000 us\$.





IS DEMAND SECURE?

Assumptions and Methodology

➤ Scenario Methodology

➤ Infrastructure

➤ Prices





IS DEMAND SECURE?

Gas to Power

- Gas as a fuel of choice for power generation?
- Competition among primary energy sources.
- Gas and Power Complexes (Mr. Junji Yoshitake).





IS DEMAND SECURE?

Regulation and Environmental Issues

- Diversification of Energy Sources.
- Changing profile of energy policies.
- Environmental Impact of energy consumption.





SUMMARY

	2000	2030
Gas Demand tcm/y	2.4	High 5.7
		Base 4.8
		Low 4.1

Share of Gas in Primary Energy

tcm/y = 10¹² cubic meters/year

23 %



27%



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IGU PGCB 3

Members and collaborators

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