



2006
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23rd World Gas Conference Amsterdam 2006



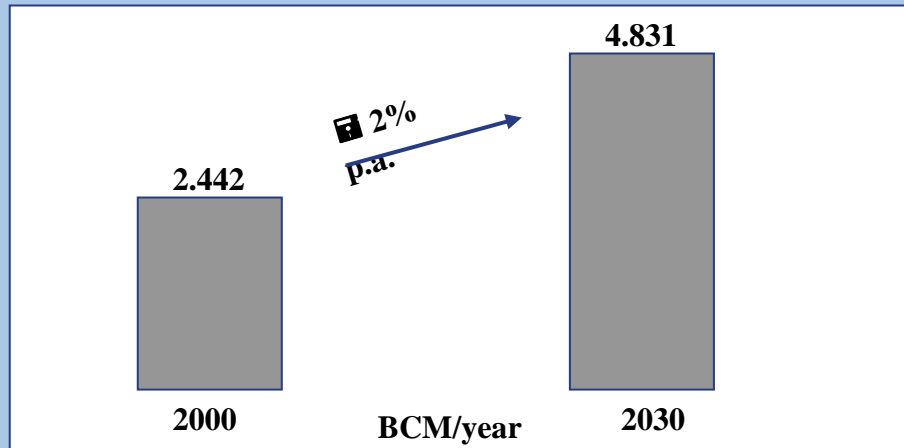
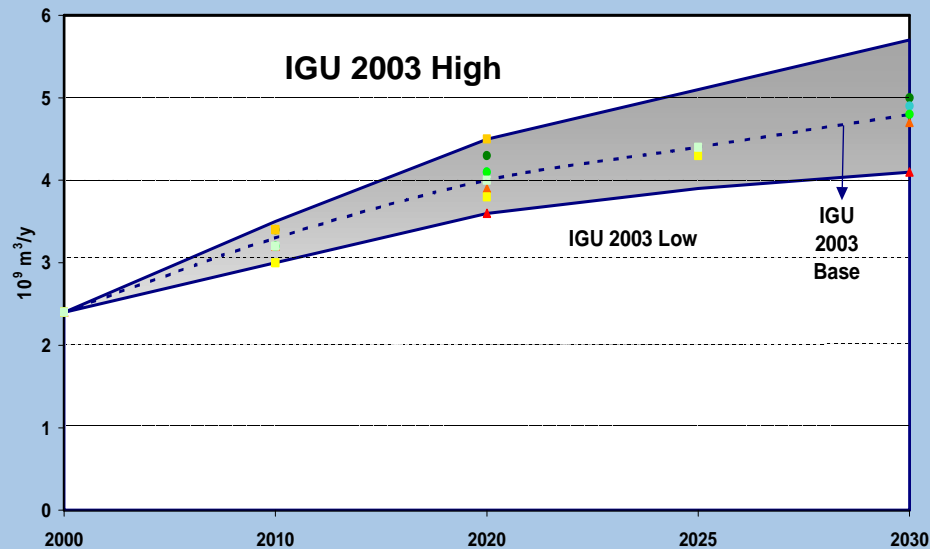
Topics of the Committee-Report
Strategic Trends and Challenges in the World Gas Industrie's Development
Dr. Klaus-Robert Kabelitz, E.ON Ruhrgas AG, Germany
Chairperson of Program Committee B
Amsterdam, 7 June 2006





World Natural Gas Demand Development by Market Segment (Basecase 2003)

Gas Demand Forecast

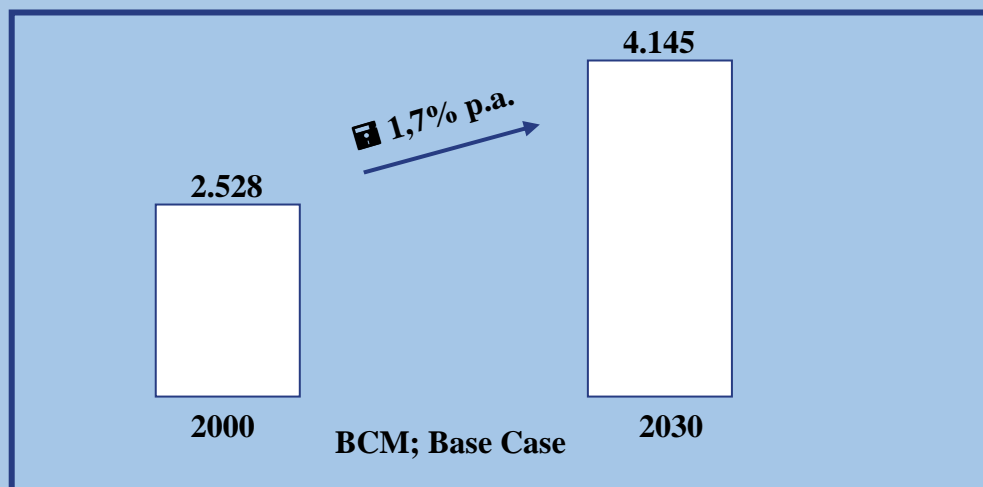


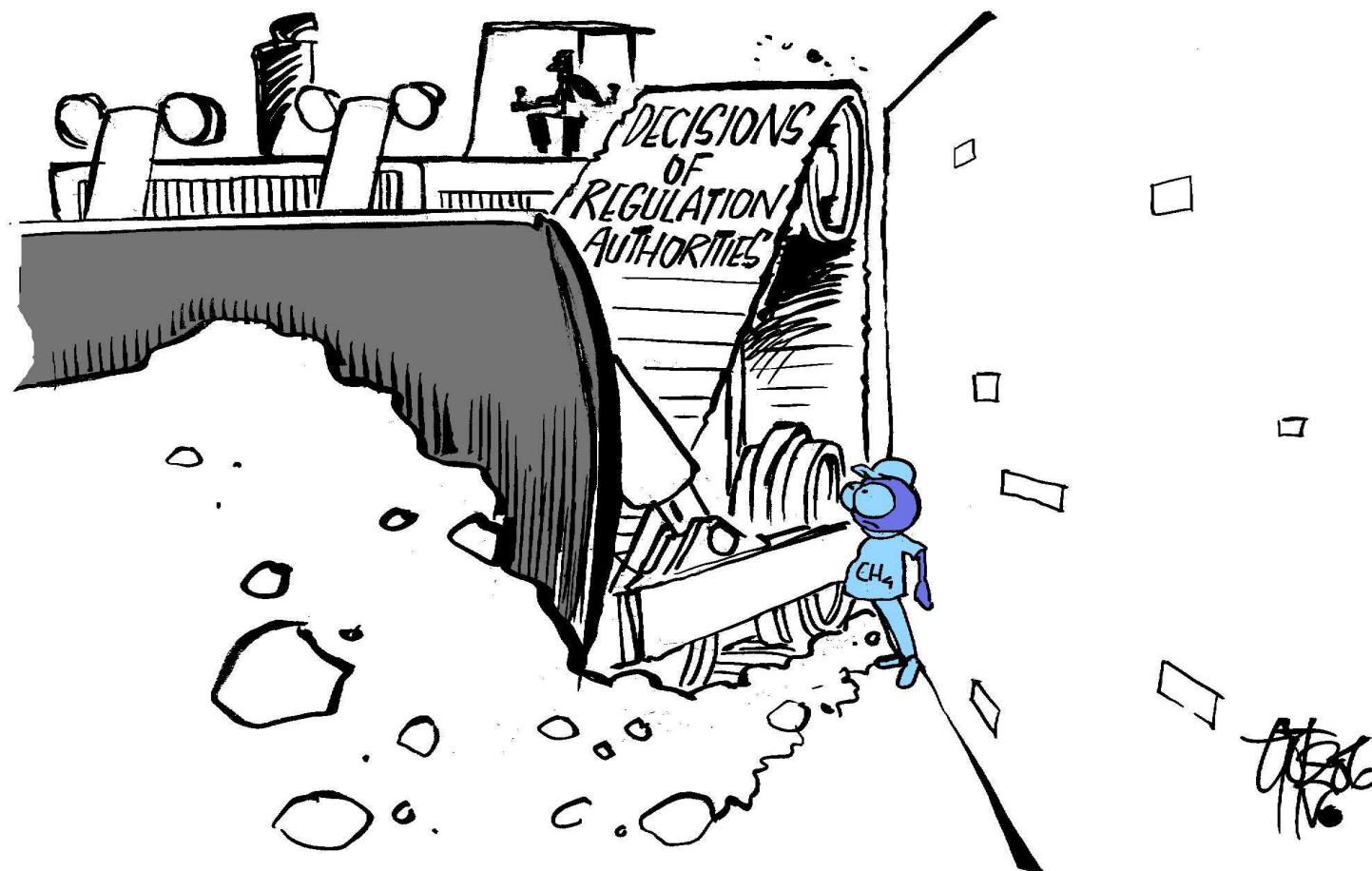
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Potential Global Gas Supply 2000-2030

	Actual		Potential			Average Annual Growth
	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2020</u>	<u>2030</u>	<u>2000-2030</u>
Base Case	2,528	2,893	3,284	3,789	4,145	1.7 %
High Case	2,528	3,032	3,612	4,456	5,123	2.4 %
Low Case	2,528	2,780	3,038	3,376	3,531	1.1 %





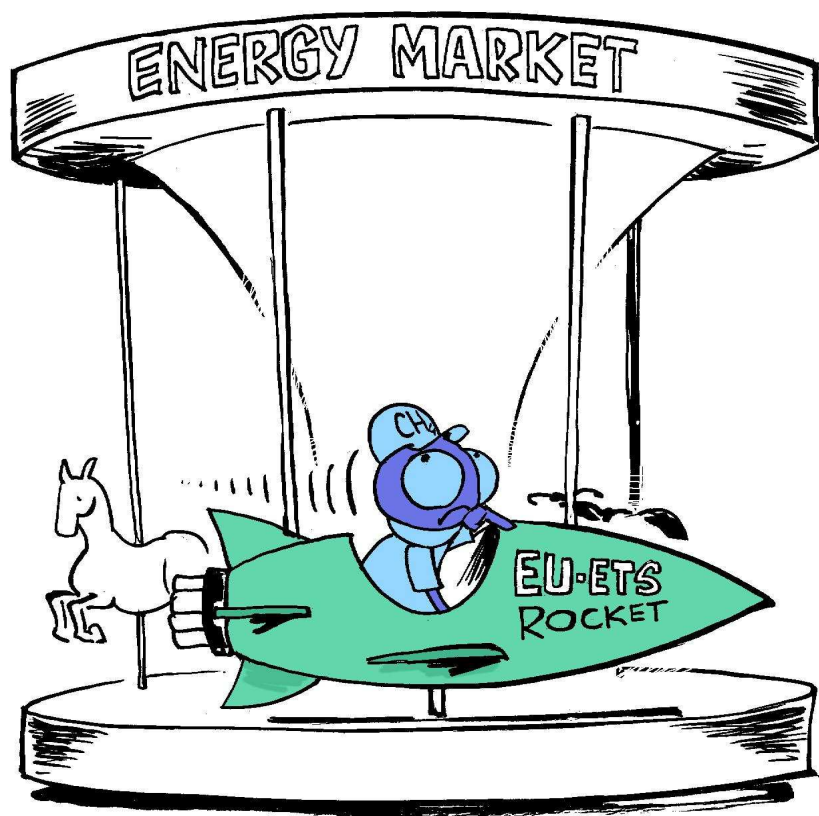
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Trade

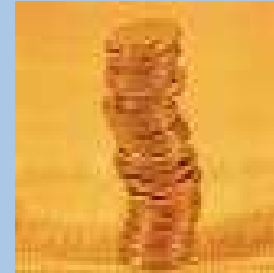
- **Interregional Trade: more than triple til 2030**
- **Middle East becomes the world's biggest gas-exporting region**
- **50 % of all internationally traded gas will be LNG**







Pricing



- **Prices will be higher than in the 1990s**
- **Margins shift to upstream**
- **Take-or-pay clauses and oil price indexation remain basis of international gas trading**



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Gas Investments needs 2001 -2030

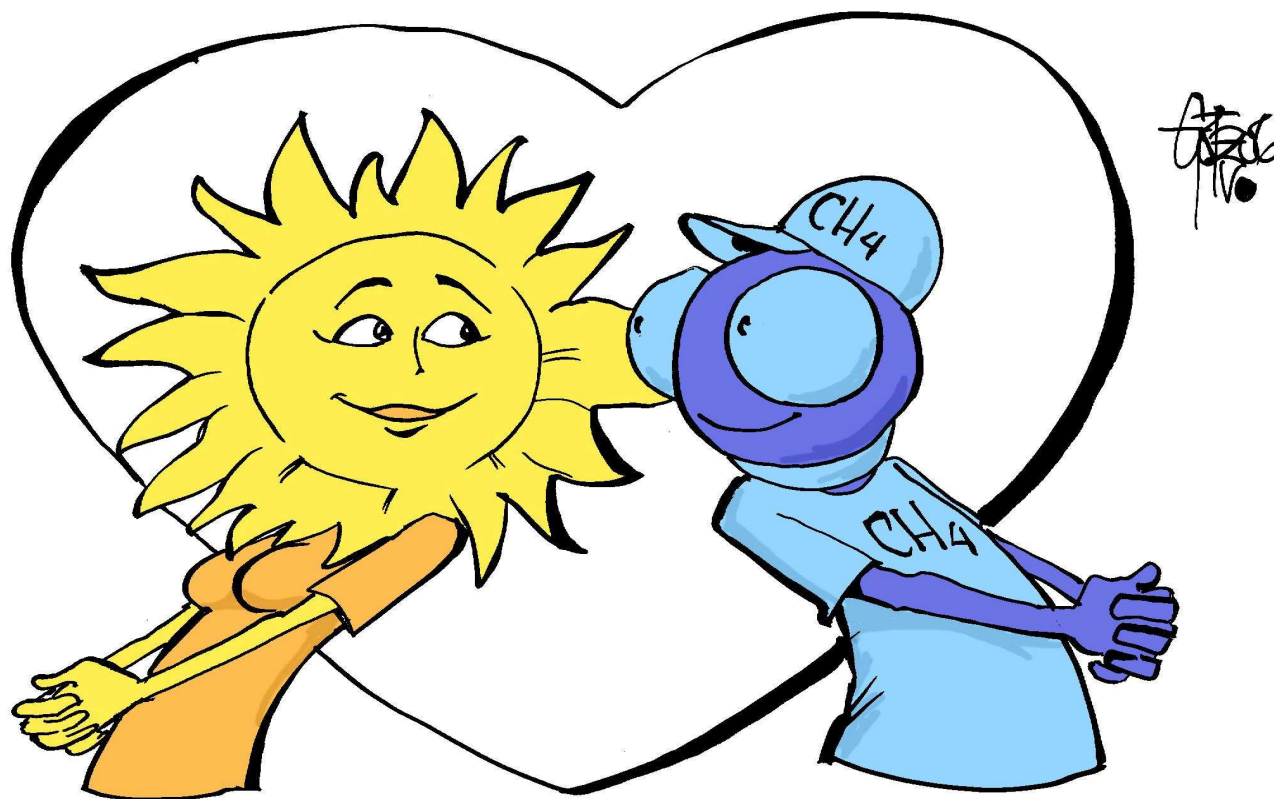
	<u>2001-10</u>	<u>2011-20</u>	<u>2021-30</u>	<u>Total</u>
Exploration and Development	478	575	678	1,731
LNG liquefaction	46	32	38	116
LNG regasification	21	21	25	67
LNG ships	30	16	22	68
Transmission	201	196	182	579
Distribution	135	160	194	489
Underground storage	36	41	17	94
Total	947	1,041	1,156	3,144

Ca. 55 % of total investment for exploration and development





Gas powers the people and preserves the world



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