



25th world gas conference
"Gas: Sustaining Future Global Growth"

The Next Phase for Global LNG

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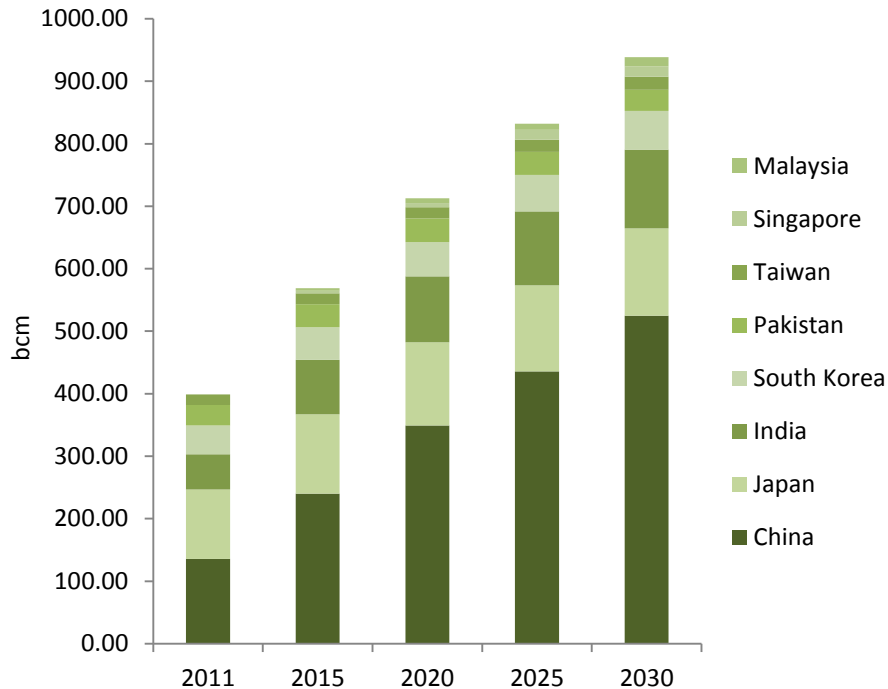


Technological innovation continues to characterise the industry



Asian demand will be strong with potential upside

Asian gas demand to 2030



Source: Wood Mackenzie

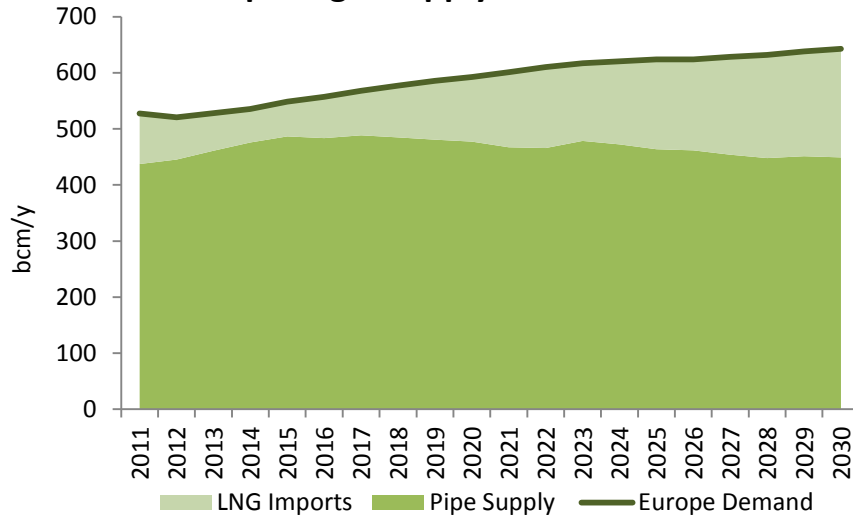
Upside potential for Asia demand

- Nuclear generation policy
- Coal generation policy
- Increasing environmental concerns
- Indigenous supply of CBM/shale
- Enhanced infrastructure build



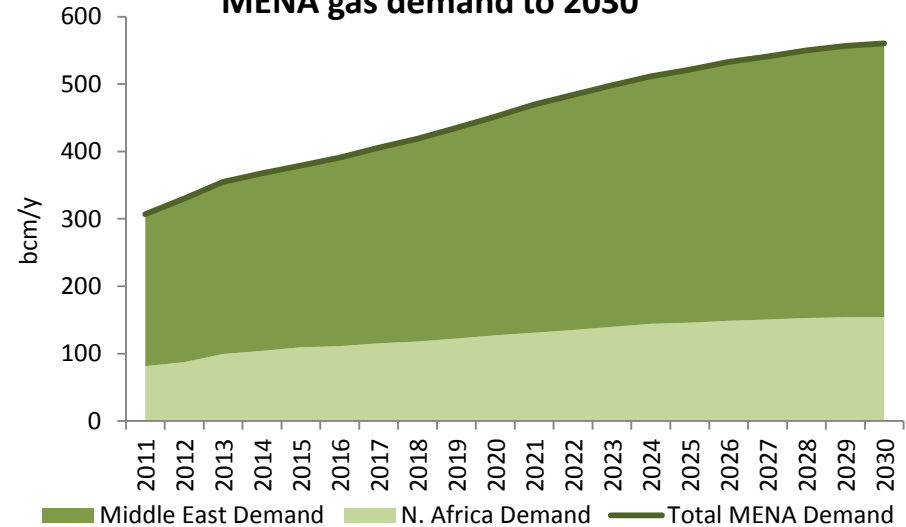
LNG will increase its share in Europe; MENA demand catching up with Europe by 2030

European gas supply mix to 2030



Source: Wood Mackenzie

MENA gas demand to 2030



Source: Wood Mackenzie

European uncertainty

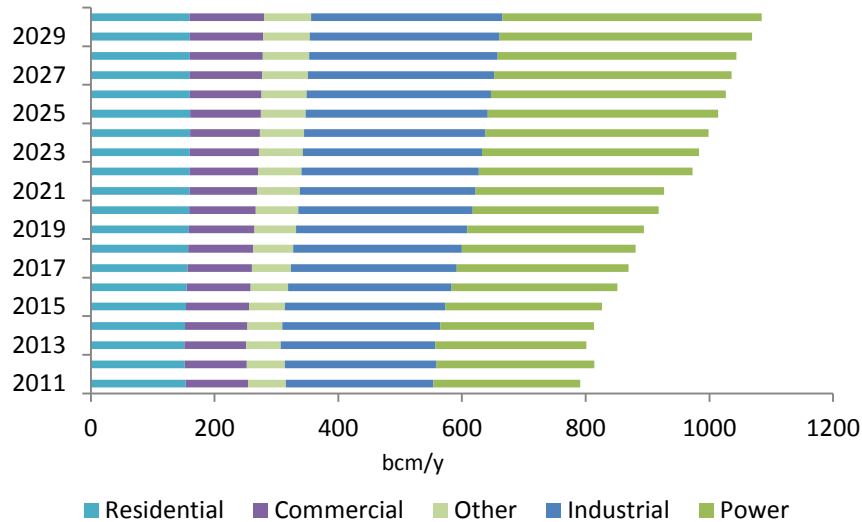
- Economic performance
- Renewables subsidies
- Coal generation
- Carbon price

Middle East LNG Demand

- Growing energy demand
- Declining oil & gas production
- Regional supply options
- Oil for export

North American demand shows great growth potential

North American gas demand to 2030



Source: Wood Mackenzie Global Gas Tool

Clean Energy's Natural Gas Highway



- CNG & LNG filling stations
- Approximately 70 stations in 33 states by end 2012
- Focus on heavy trucking
- Lower GHG emissions
- Reduce oil dependence
- Large saving vs. gasoline

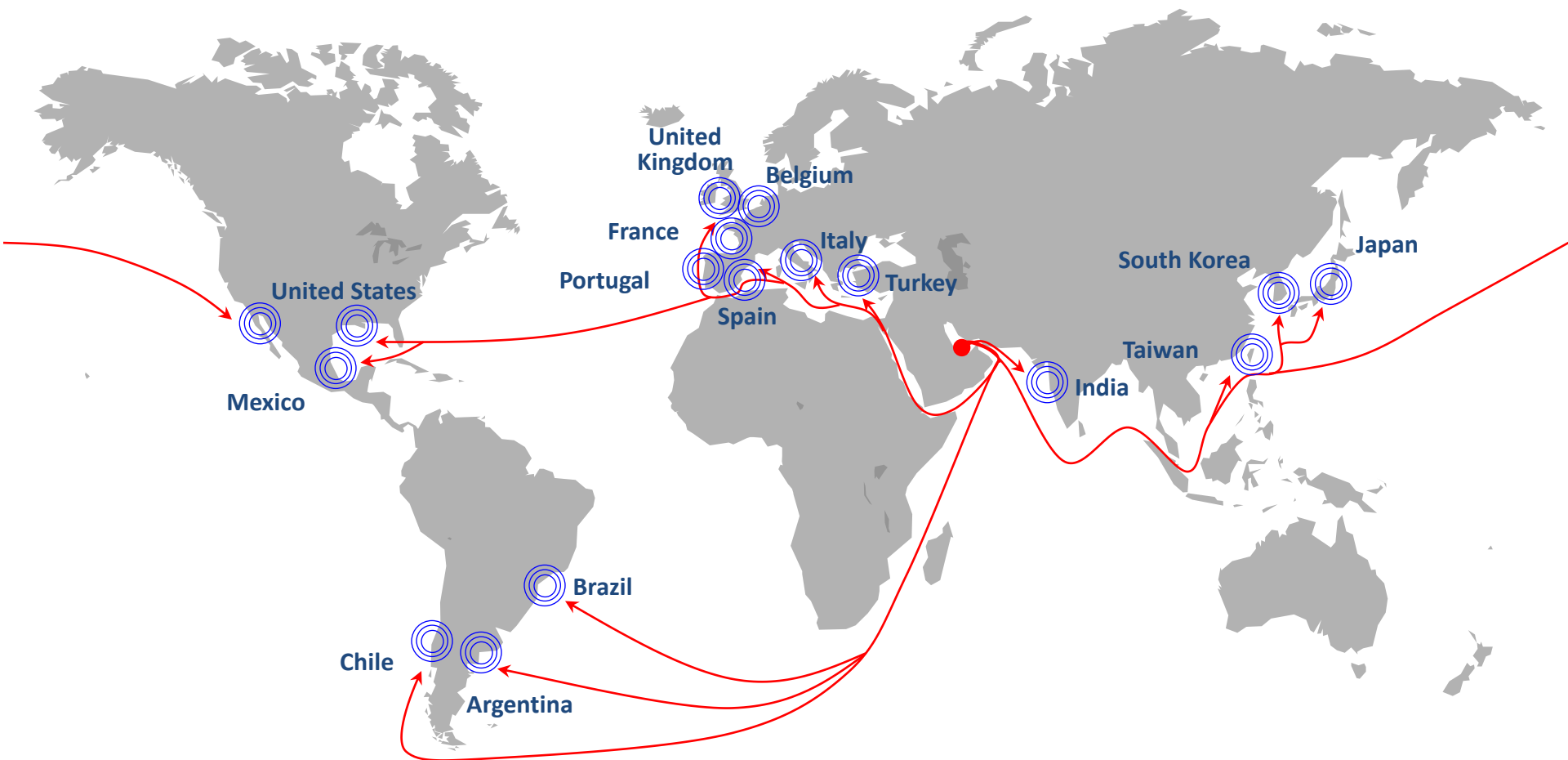
North America

- LNG Exports to Asia
- Gas-to-Liquids
- EPA Regulations
- Road Transportation

Bringing online new supplies will be challenging



RasGas continues to expand its market reach



RasGas is a mature and expanding gas supplier



The shipping industry is entering its next phase



A converted product carrier



LNG propulsion technology



South American catamarans



Qatari LNG carriers



Ferries in Scandinavia

The next phase for global LNG has already begun





the power of the drop
THE ENERGY TO TRANSFORM

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