



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

Risks & Opportunities for Asian Unconventional Gas

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6th June 2012



Patron



Host

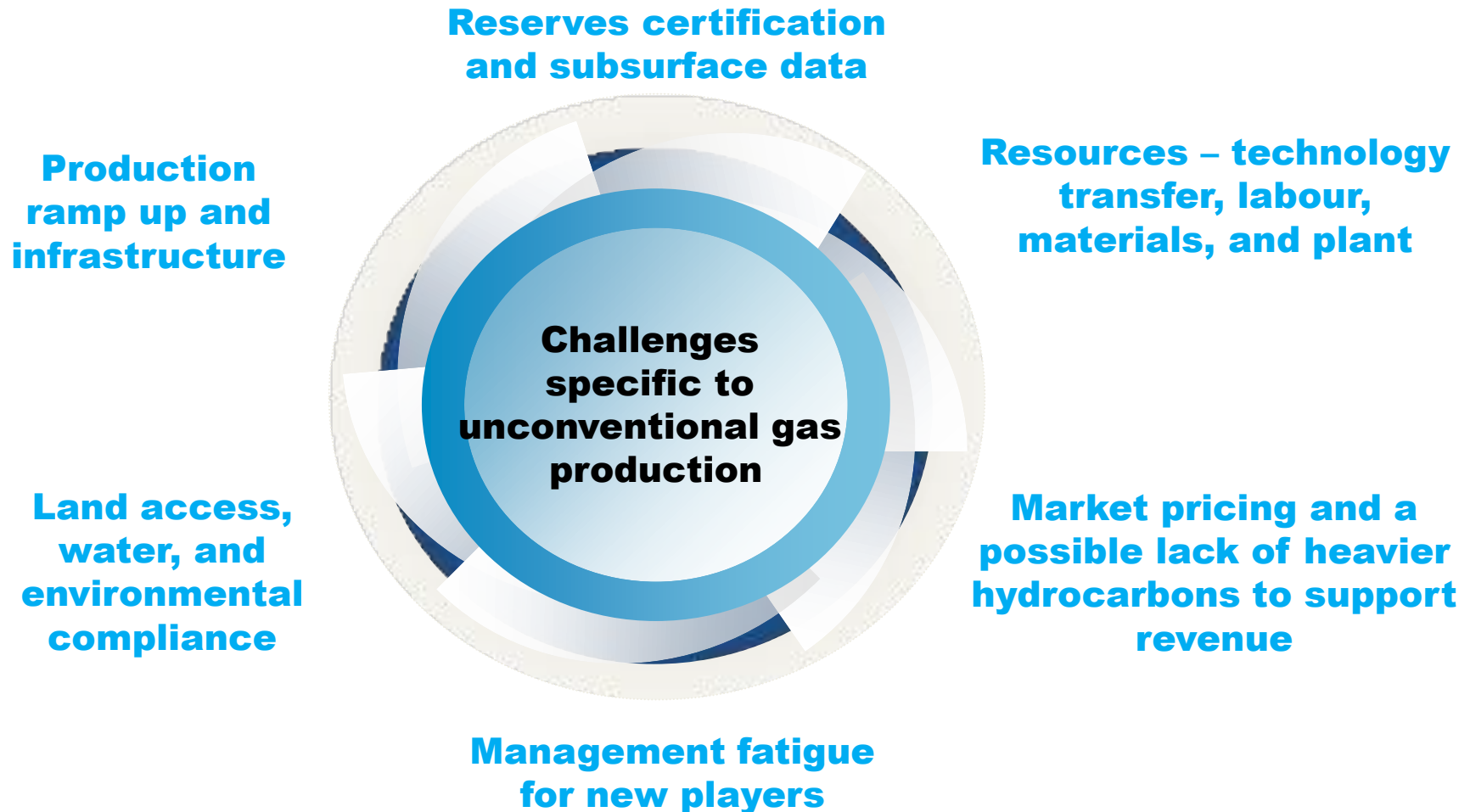


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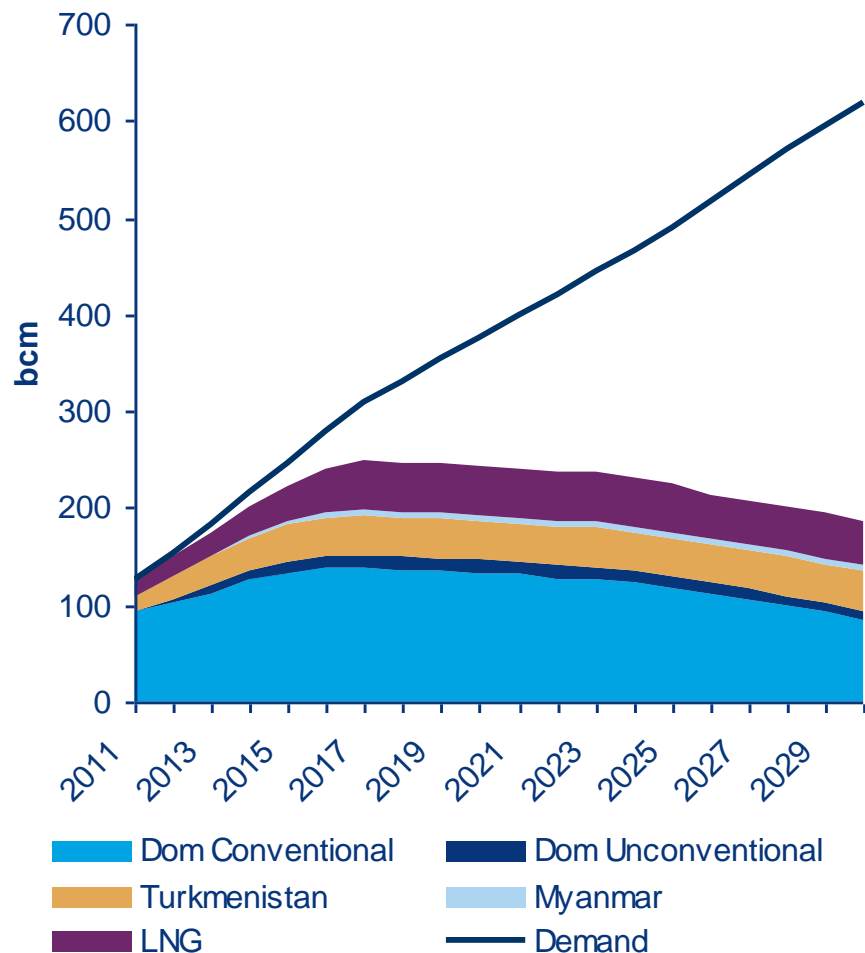
The Asian unconventional gas sector faces specific challenges

Specific Challenges for Unconventional Gas in Asia

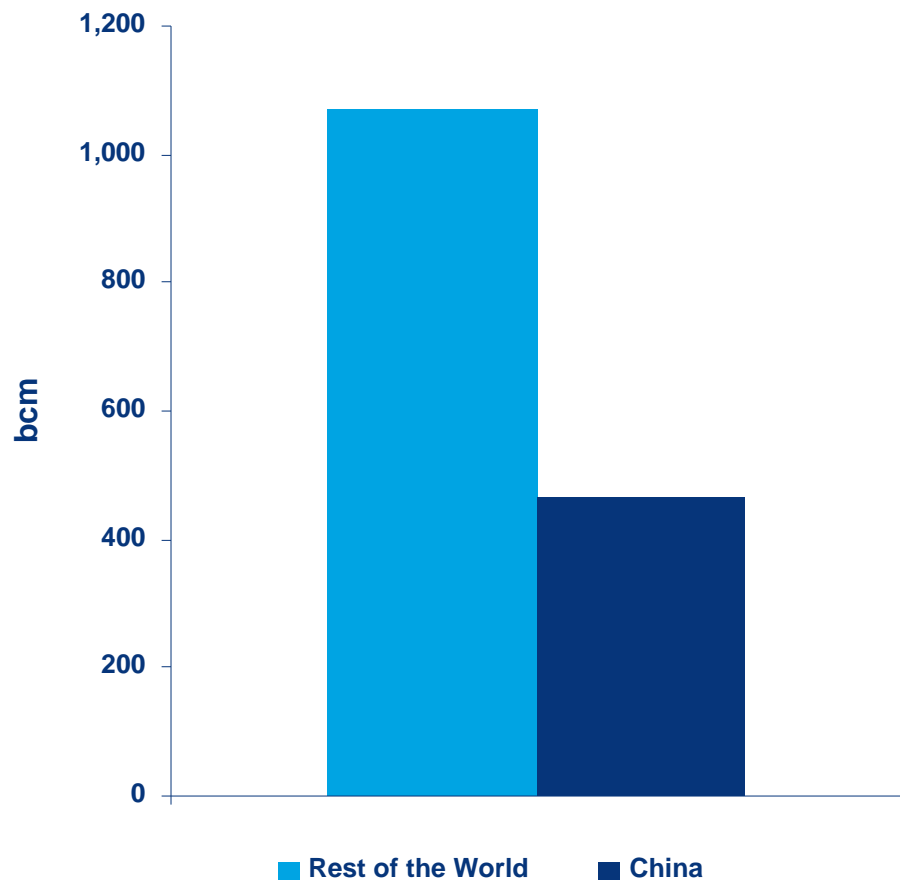


Positive fundamentals are continuing to drive China's demand towards true gas super-power status

China Gas Supply & Demand



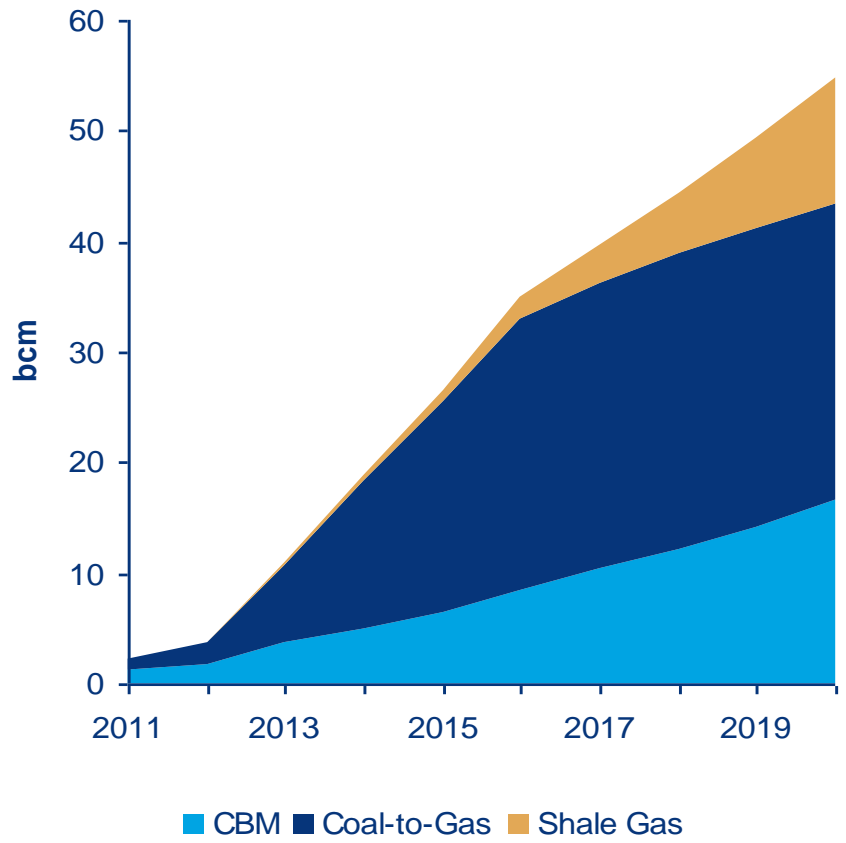
2012-2030 Incremental Gas Demand Growth



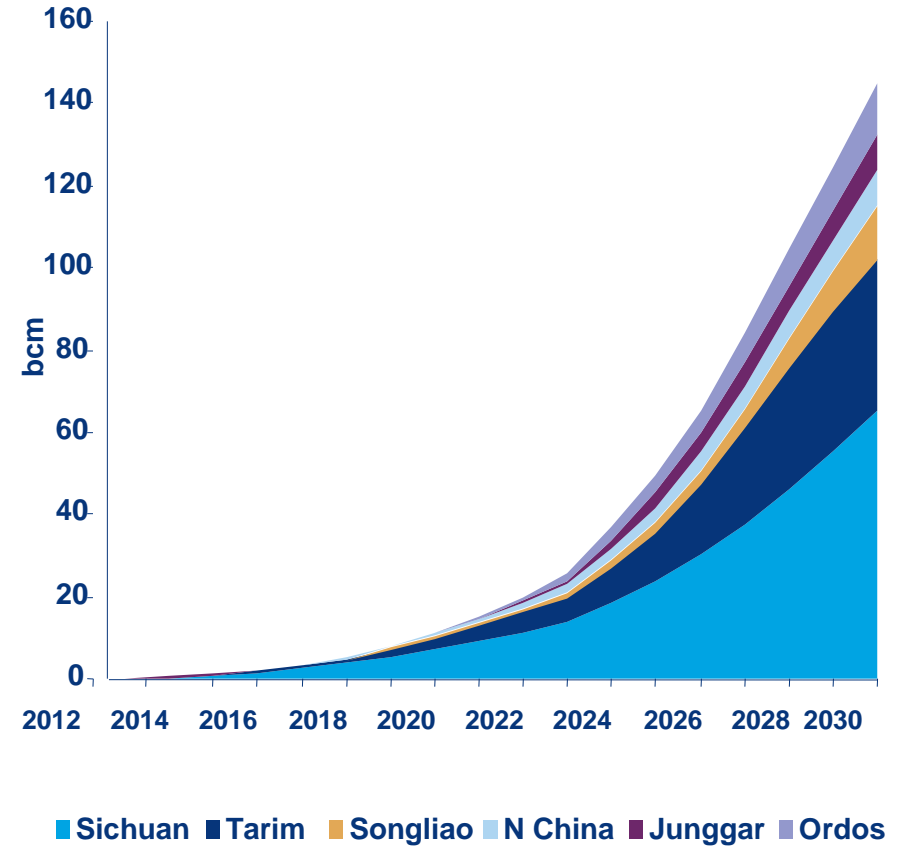
China's supply will be significantly boosted by shale, but in the mid-term it is CTG that has the biggest impact



China Unconventional Gas Production



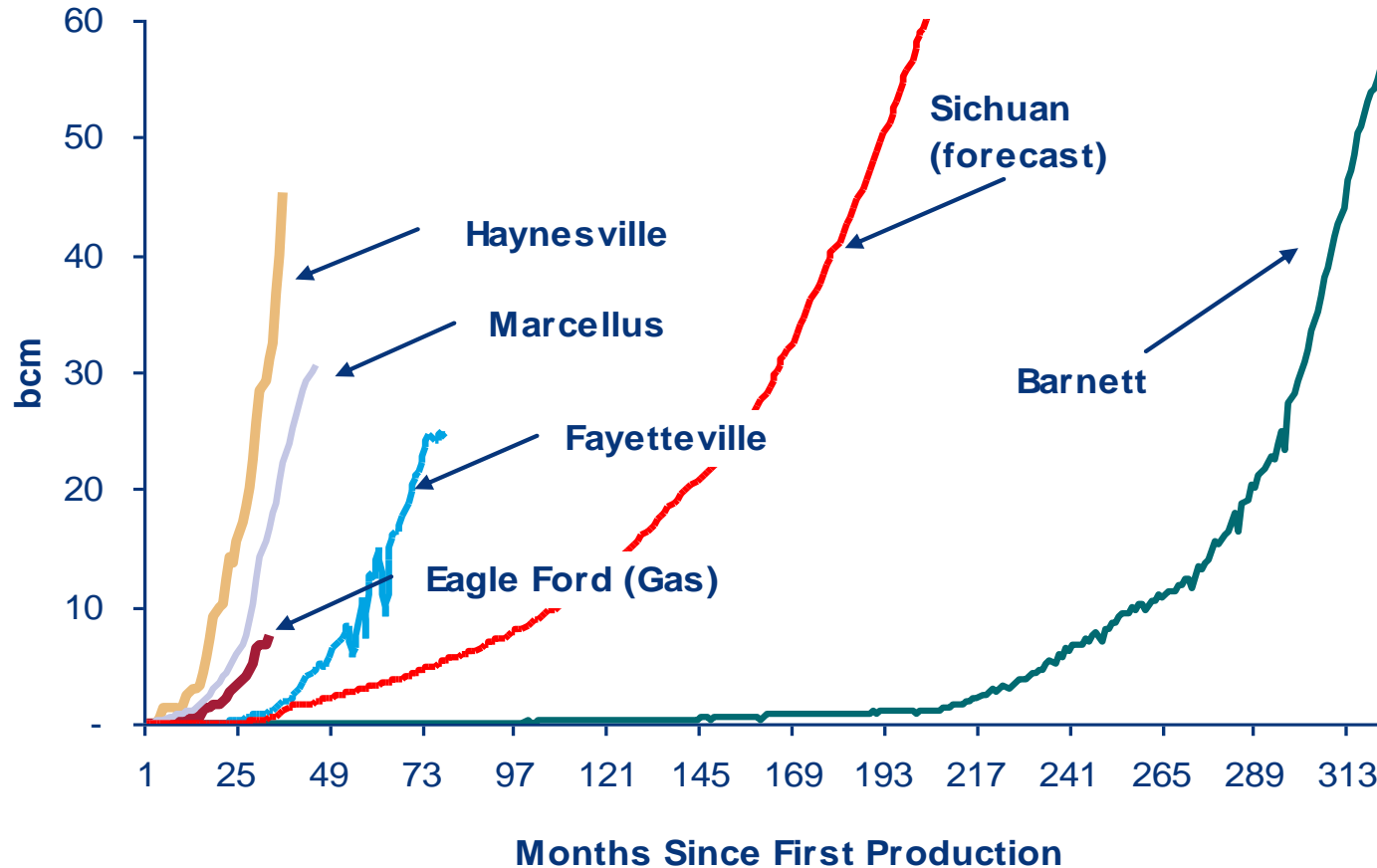
China Shale Gas Supply Forecast by Basin



Source: Wood Mackenzie China Gas & Power Service

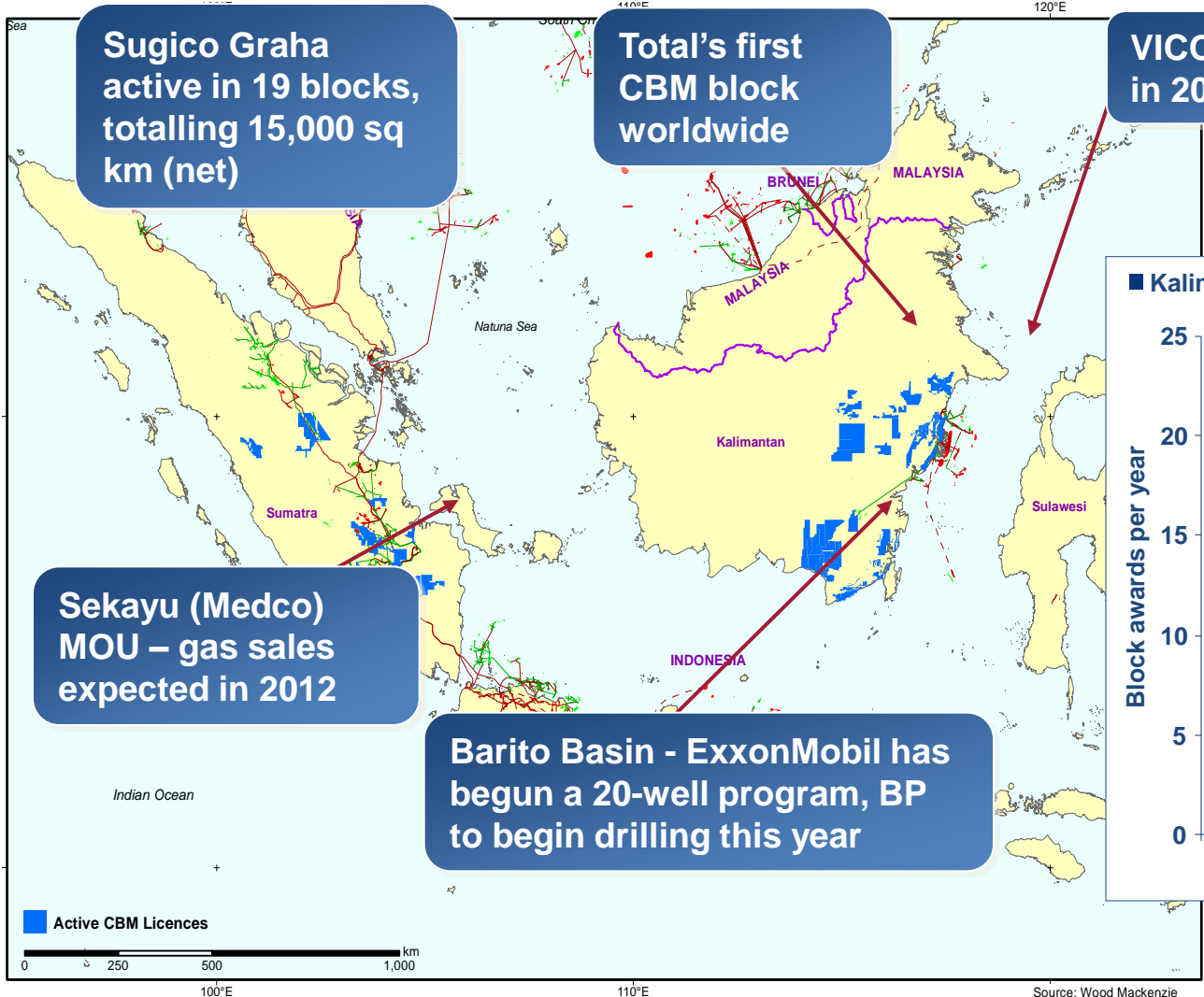
The US experience suggests shale gas growth by key basin will not be linear

US Shale Plays Vs Sichuan Forecast – Output Growth from First Production



Source: Wood Mackenzie, State Production Data
Haynesville Time Zero is 1Q 2008; Fayetteville Time Zero is 2004; Barnett Time Zero is 1982, Eagle Ford is Oct. 2008, Marcellus start time is from Jan. 2008

Indonesia's CBM resource base seems significant and activity levels are increasing



VICO – First CBM-to-LNG in 2011

