

GULF OF GUINEA GAS CONFERENCE 2013

November 6-9, 2013

*Natural gas: Supporting sustainable development
in the Gulf of Guinea and Africa*



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Président IGU

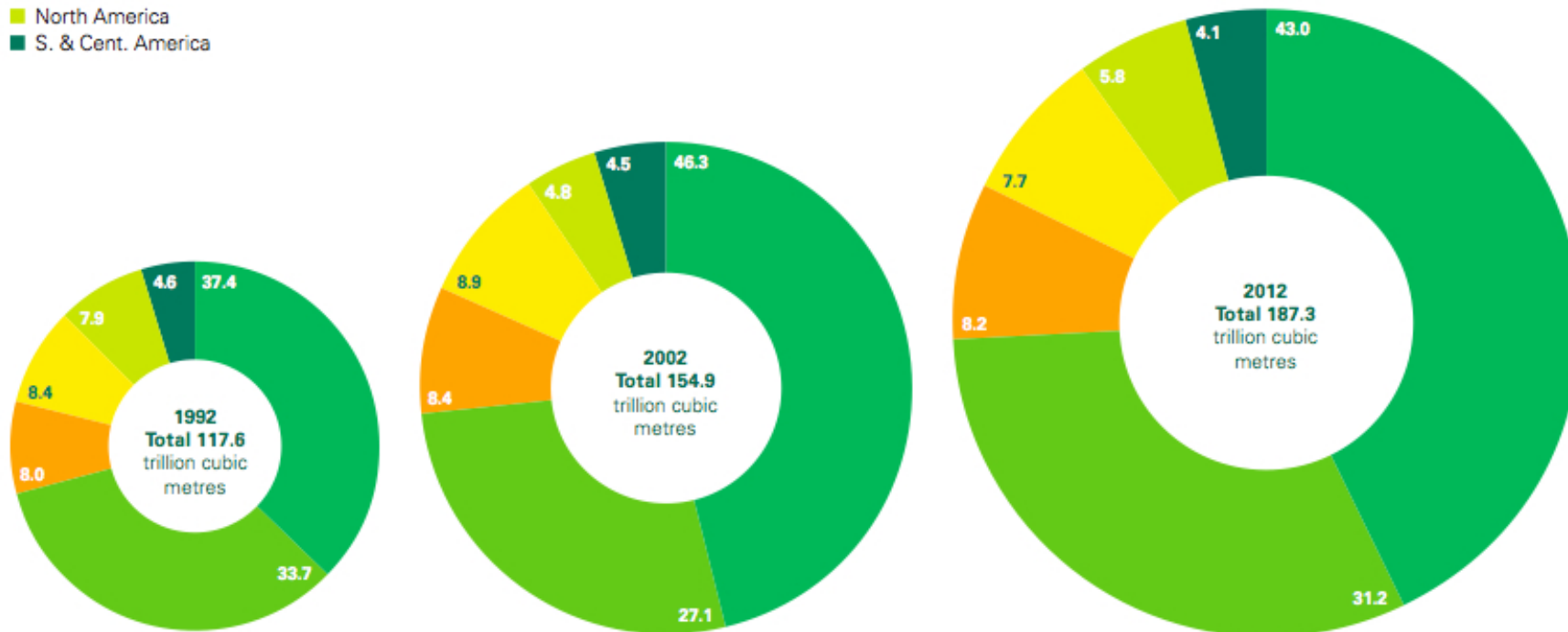
Natural gas in Africa: 7.7% of world reserves

Source: BP Statistical Review 2013

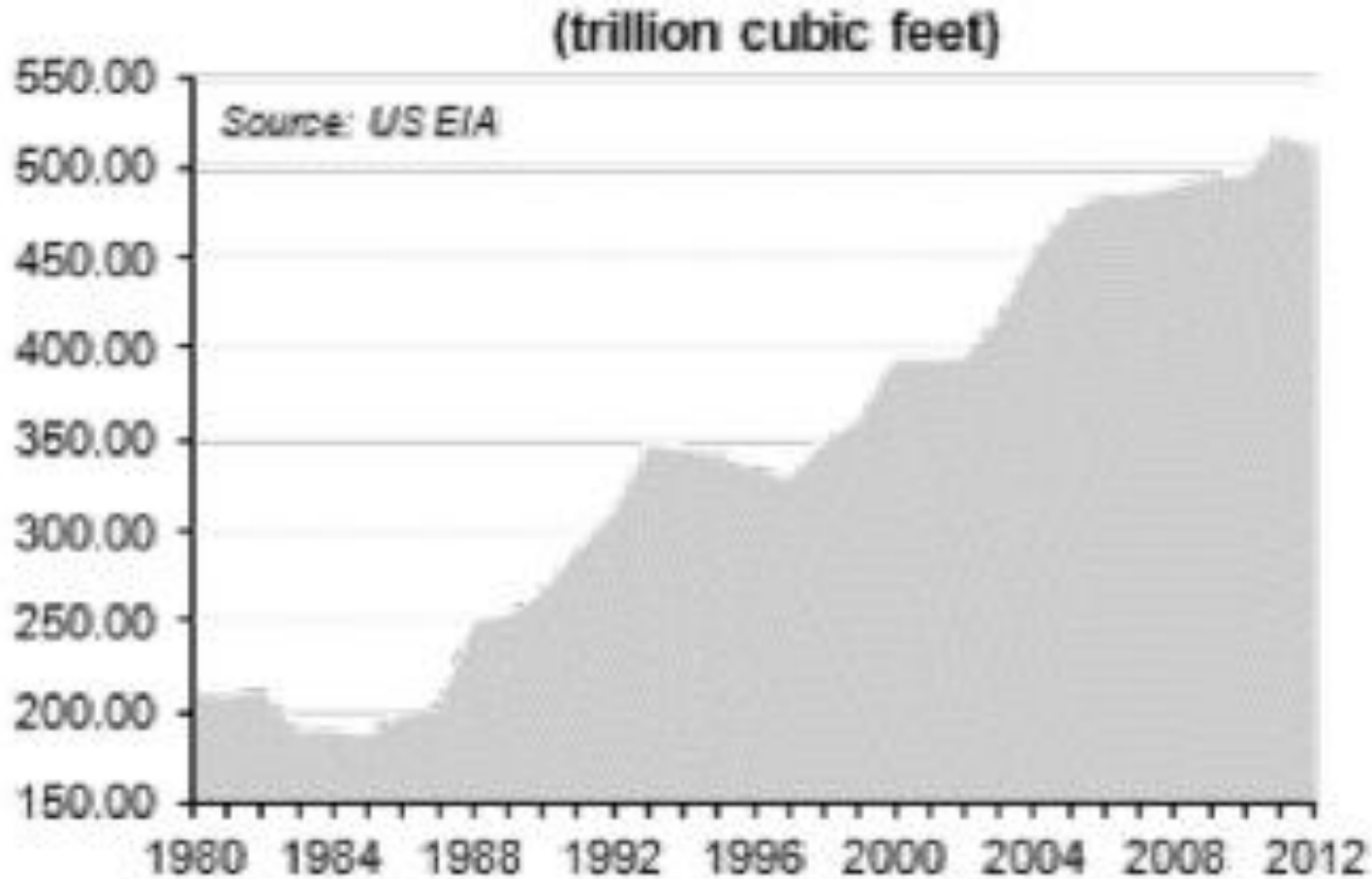
Distribution of proved reserves in 1992, 2002 and 2012

Percentage

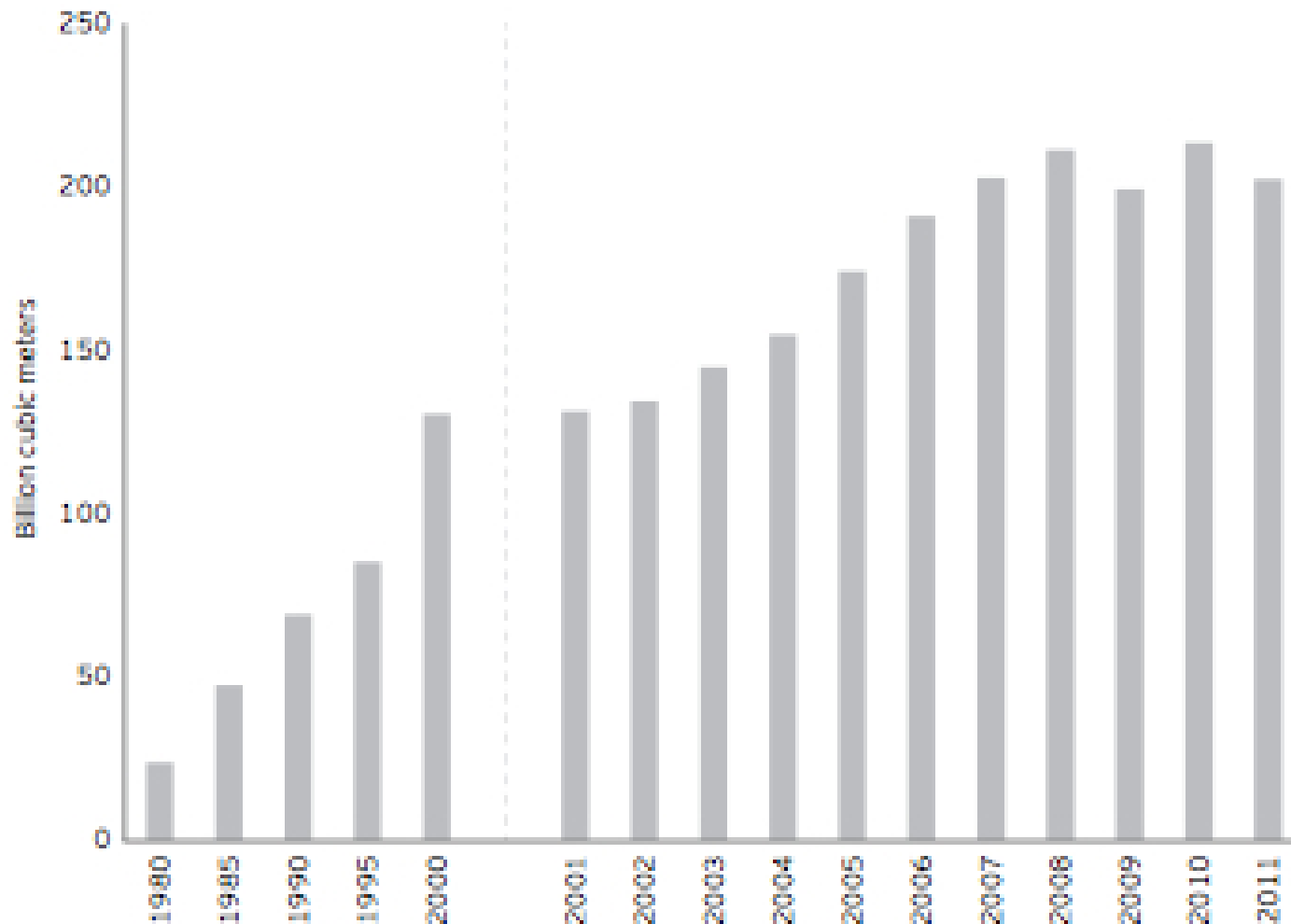
- Middle East
- Europe & Eurasia
- Asia Pacific
- Africa
- North America
- S. & Cent. America



Africa's proven reserves of natural gas

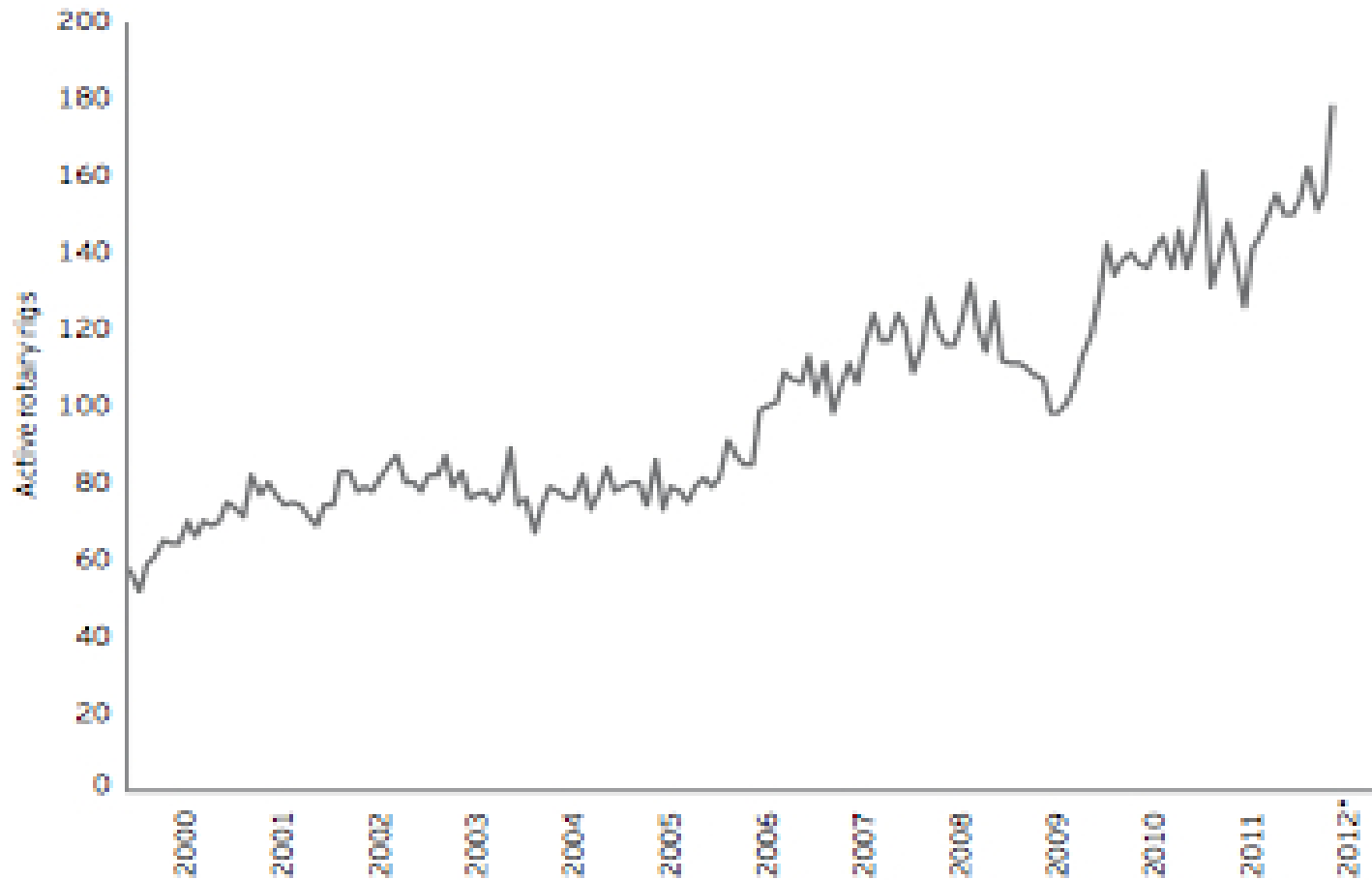


African natural gas production



Source: "BP Statistical Review of World Energy," BP plc, June 2012.

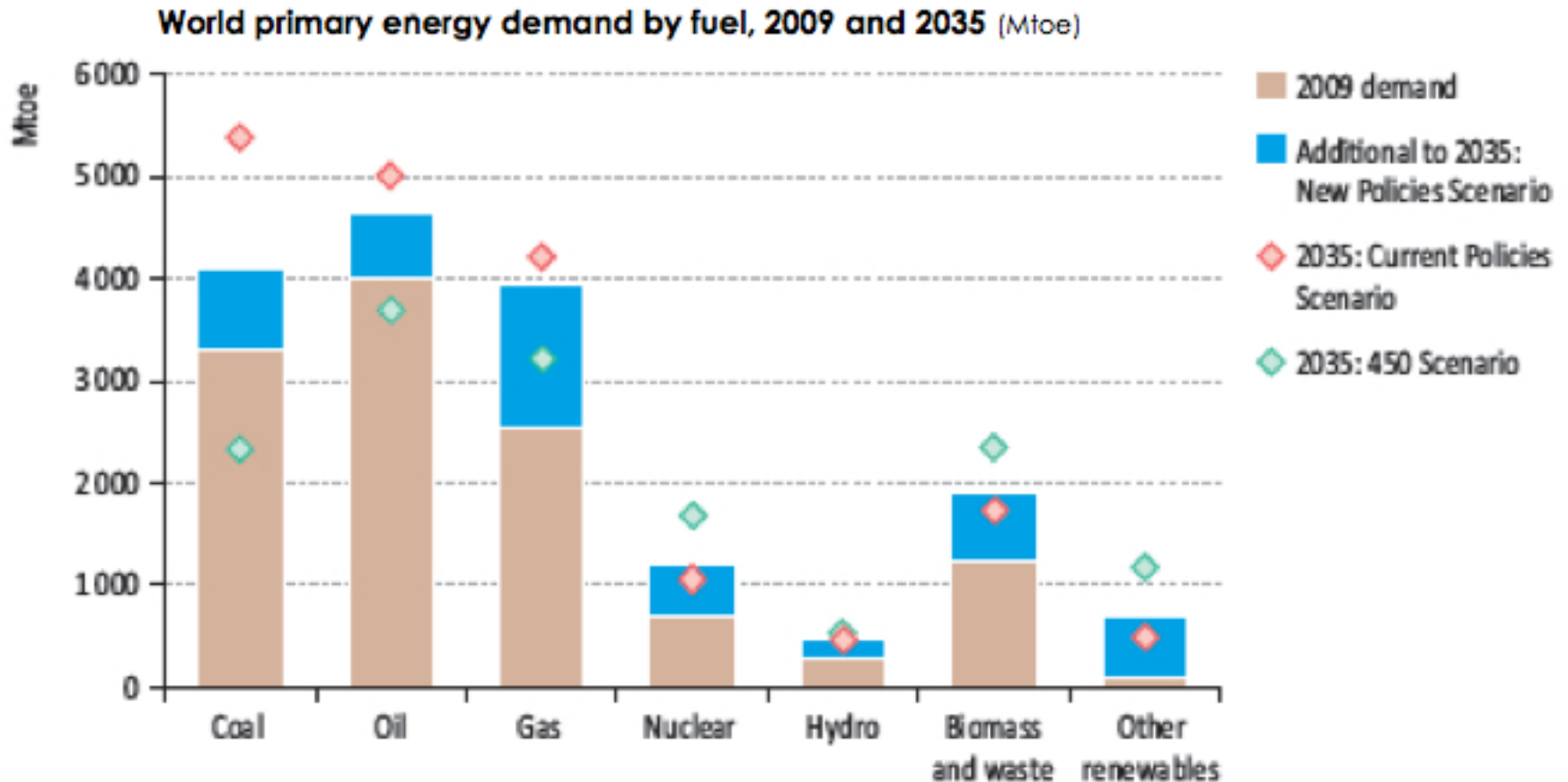
African oil and gas drilling rig counts



*2012 through June

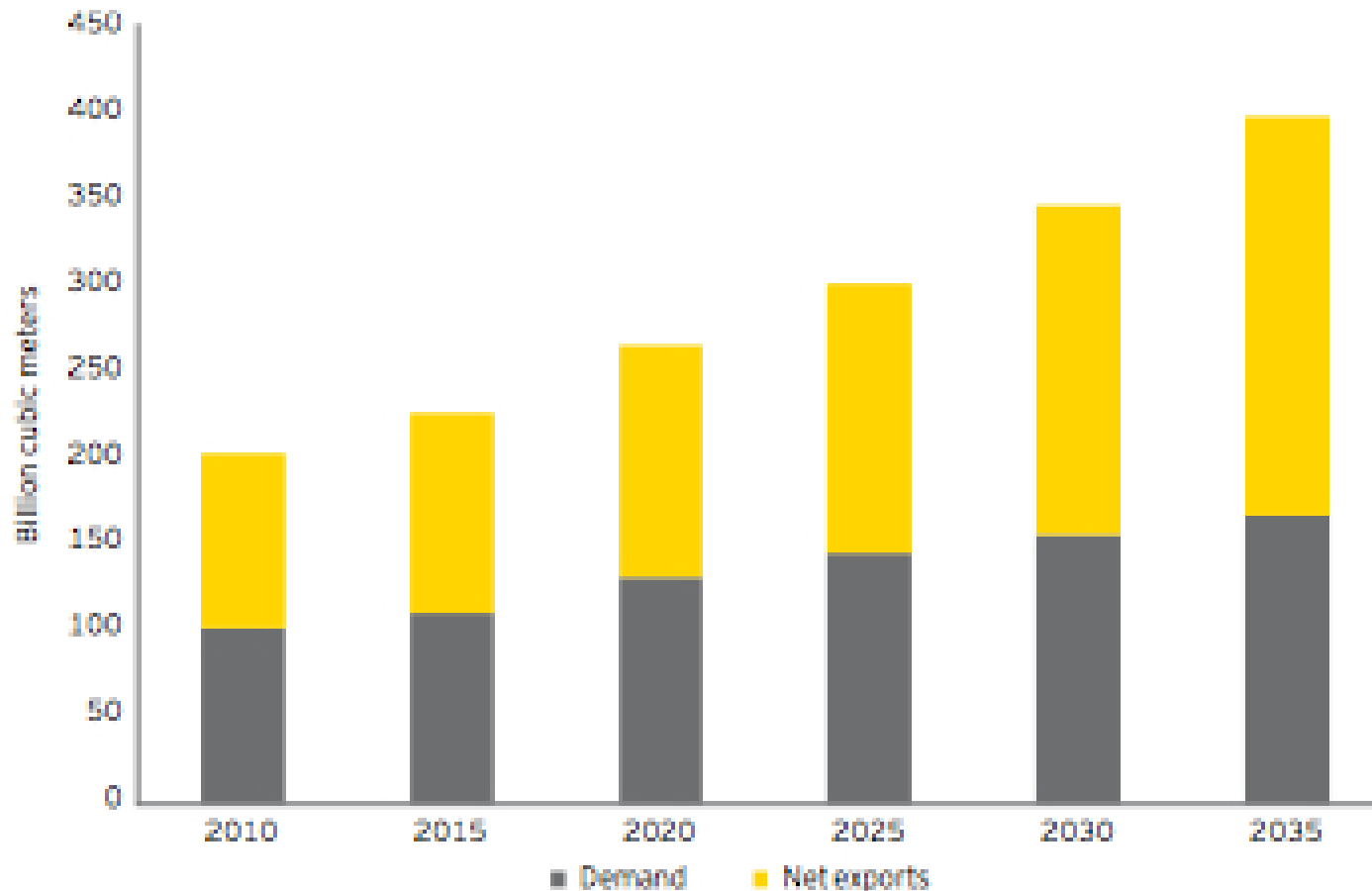
Source: Ernst & Young analysis of Baker Hughes Inc. data.

Natural gas: the major contributor to energy growth



Source : IEA World Energy Outlook 2011- New Policies Scenario

Natural gas in Africa: Are we striking the right balance between internal demand and exports?



Source: Ernst & Young calculations from the International Energy Agency (IEA), "Golden Rules for a Golden Age of Gas," June 2012

LNG installed capacities and developments in Africa

Source: Taqa, IGU, Ernst & Young, IEA



Country	Project	Start*	Capacity (MT/yr)	Operator
Existing/operating				
Algeria	Arzew (3 trains)	1964	1.1	Sonatrach
	Skikda (4 trains)	1972	7.6	Sonatrach
	Bethloua (12 trains)	1978	16.5	Sonatrach
Egypt	Damietta (1 train)	2005	5.0	ENI
	ELNG (2 trains)	2005	7.2	BG Group
Libya	Marsa El Brega (2 trains)	1971	3.2	Sirte Oil
Nigeria	NLNG (6 trains)	1999	22.2	NNPC
Equatorial Guinea	Punta Eur (1 train)	2007	3.7	Marathon
Angola	Angola LNG (1 train)	2012	5.2	Chevron

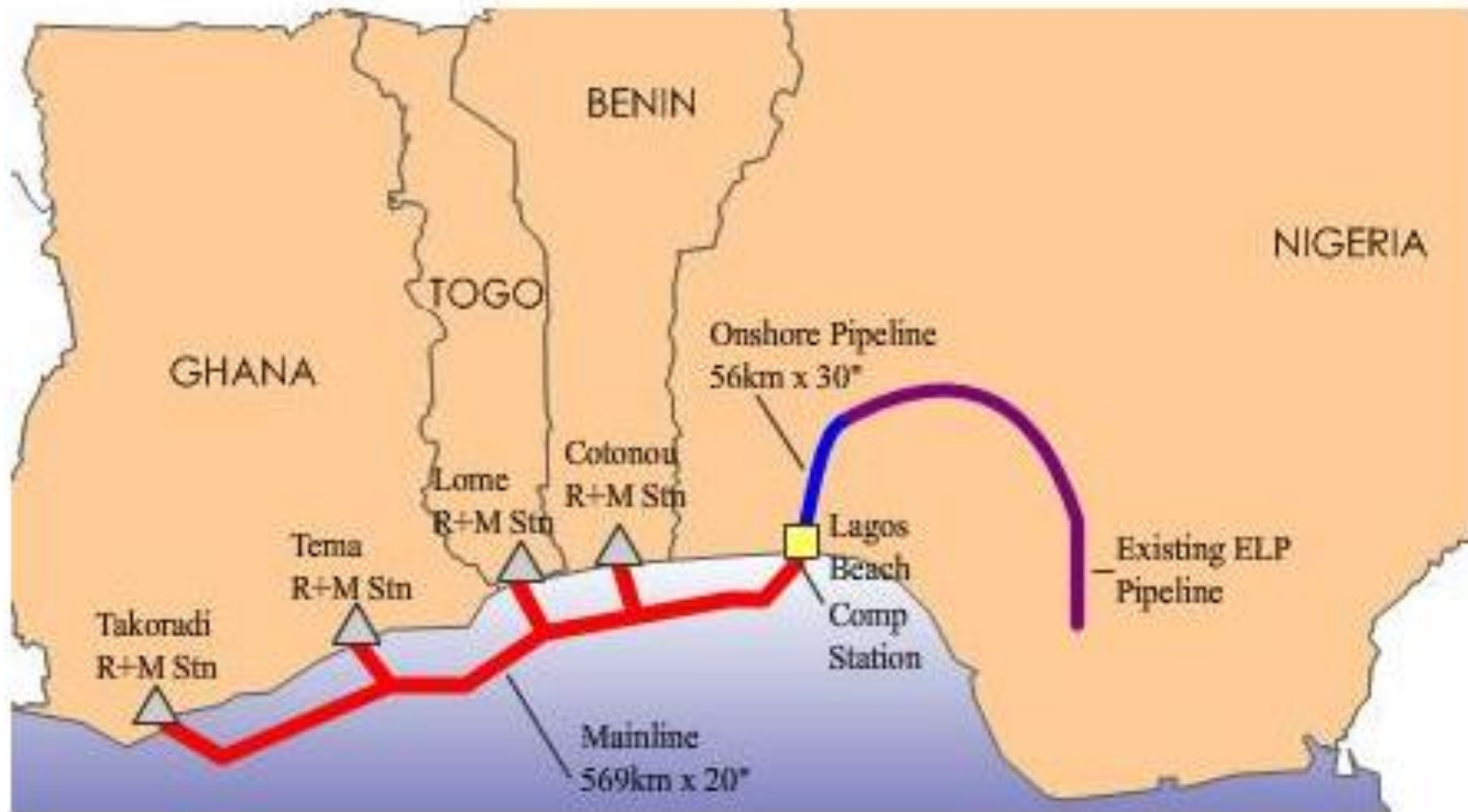
71.7



Country	Project	Start*	Capacity (MT/yr)	Operator
Planned/possible				
Algeria	Arzew GL3Z	2013	4.7	Sonatrach
Algeria	Skikda LNG	2013	4.5	Sonatrach
Libya	Marsa El Brega T3	2016	2.6	Sirte Oil
Nigeria	Progress FLNG	2017	1.5	NNPC
Cameroon	Kribi LNG	2018	3.5	GDF Suez
Egypt	Damietta T2	2018	4.8	ENI
Equatorial Guinea	Punta Eur T2	2018	4.4	Marathon
Mozambique	Mozambique T1	2018	5.0	Anadarko
Nigeria	Brass LNG T1	2018	5.0	NNPC
Tanzania	Tanzania LNG T1	2018	6.6	BG Group
Mozambique	Mozambique T2	2019	5.0	Anadarko
Nigeria	Brass LNG T2	2019	5.0	NNPC
Nigeria	NLNG T7	2019	5.0	NNPC
Nigeria	NLNG T8	2020	8.5	NNPC
Nigeria	OK LNG	2020	12.6	NNPC
Mozambique	Mamba	2020	10.0	ENI

88.7

The west African Gas Pipeline (WAGP)

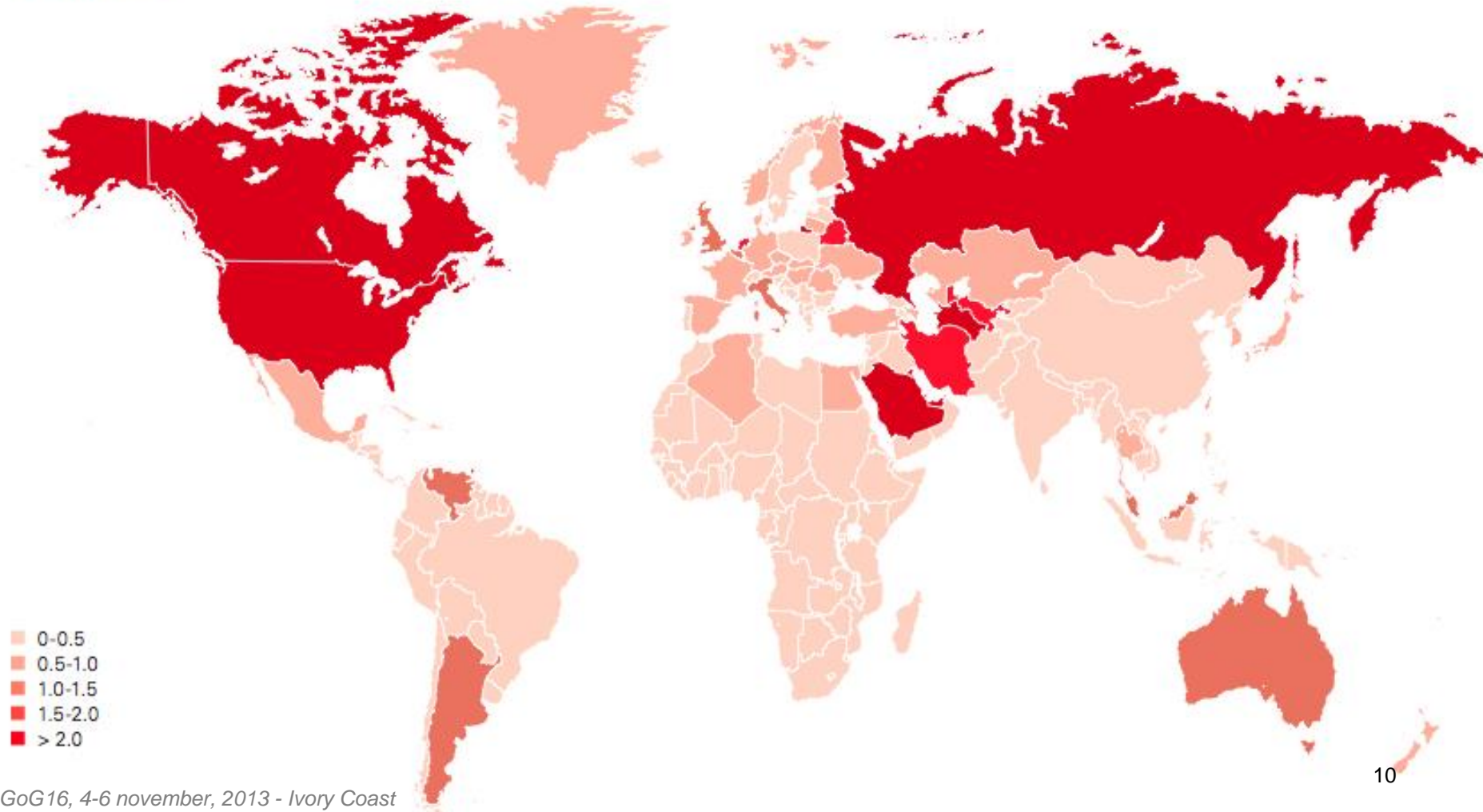


Africa has a wide potential for an increased access to natural gas

Source: BP Statistical Review 2013

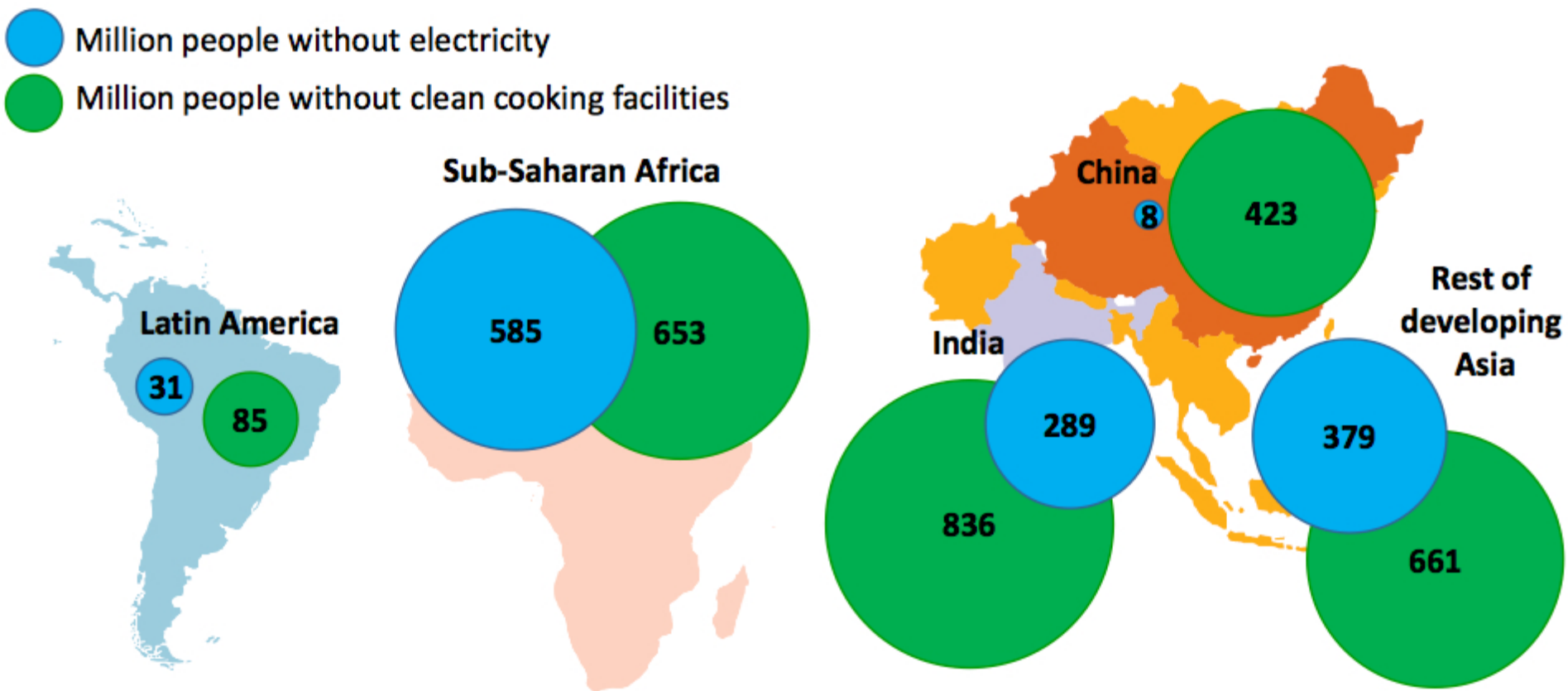
Consumption per capita 2012

Tonnes oil equivalent



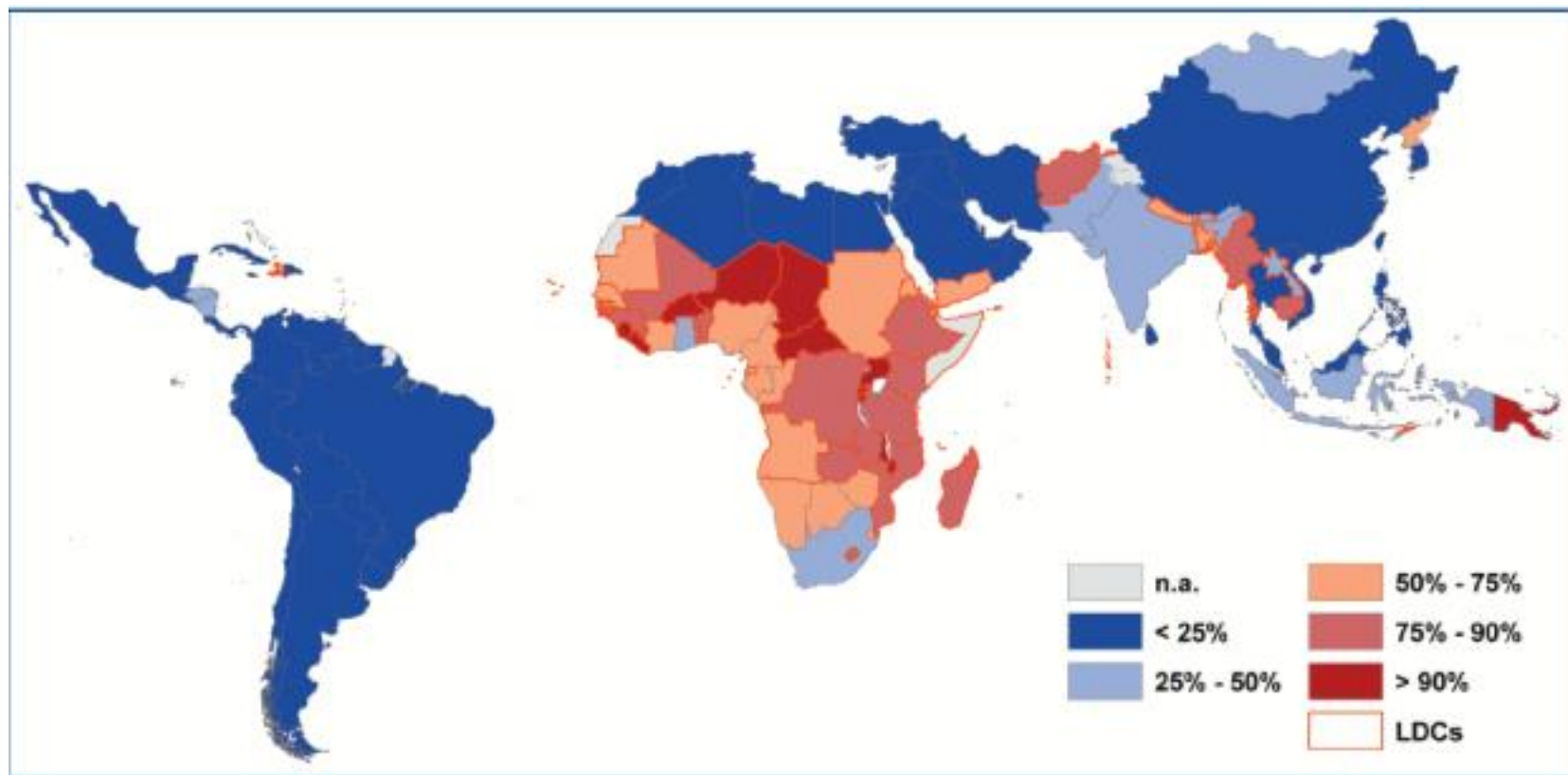
Energy poverty is widespread

SOURCE: IEA

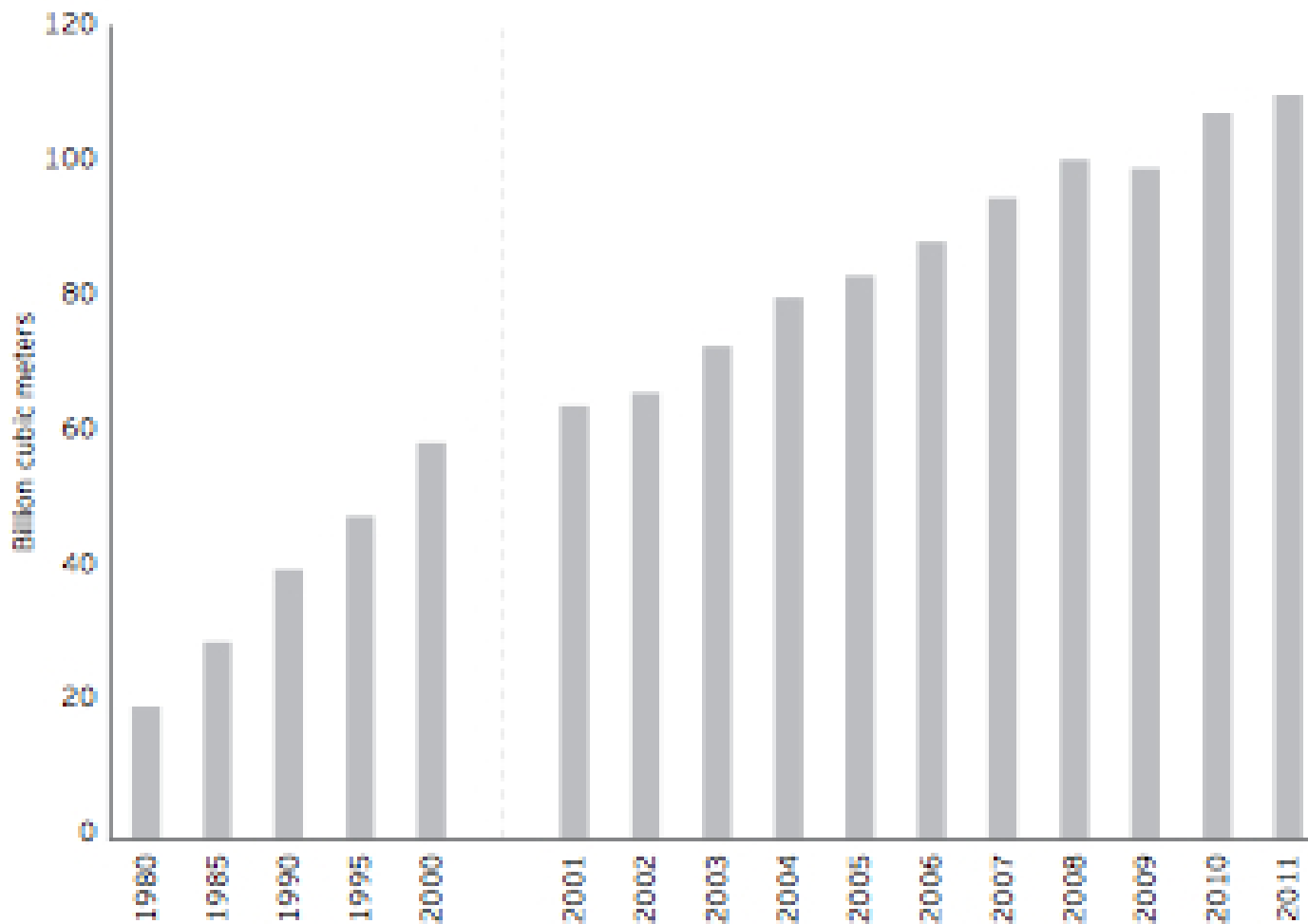


Share of people without electricity access, 2008

Source: World Health Organization



African natural gas internal consumption: less than 50% of production



Source: "BP Statistical Review of World Energy," BP plc, June 2012.

2015 World Gas Conference



26th

WORLD GAS CONFERENCE
PARIS FRANCE
1 - 5 June 2015

