



# International Gas Union



## Mega Trends of the Gas Industry

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**Secretary General of IGU**

**23rd INTERNATIONAL SCIENTIFIC MEETING OF  
GAS EXPERTS**

**Opatija, 07-10 May 2008**



- **The International Gas Union**
- **Globalisation of gas markets**
- **The climate challenge**
- **Access to resources**
- **Importance of R&D**



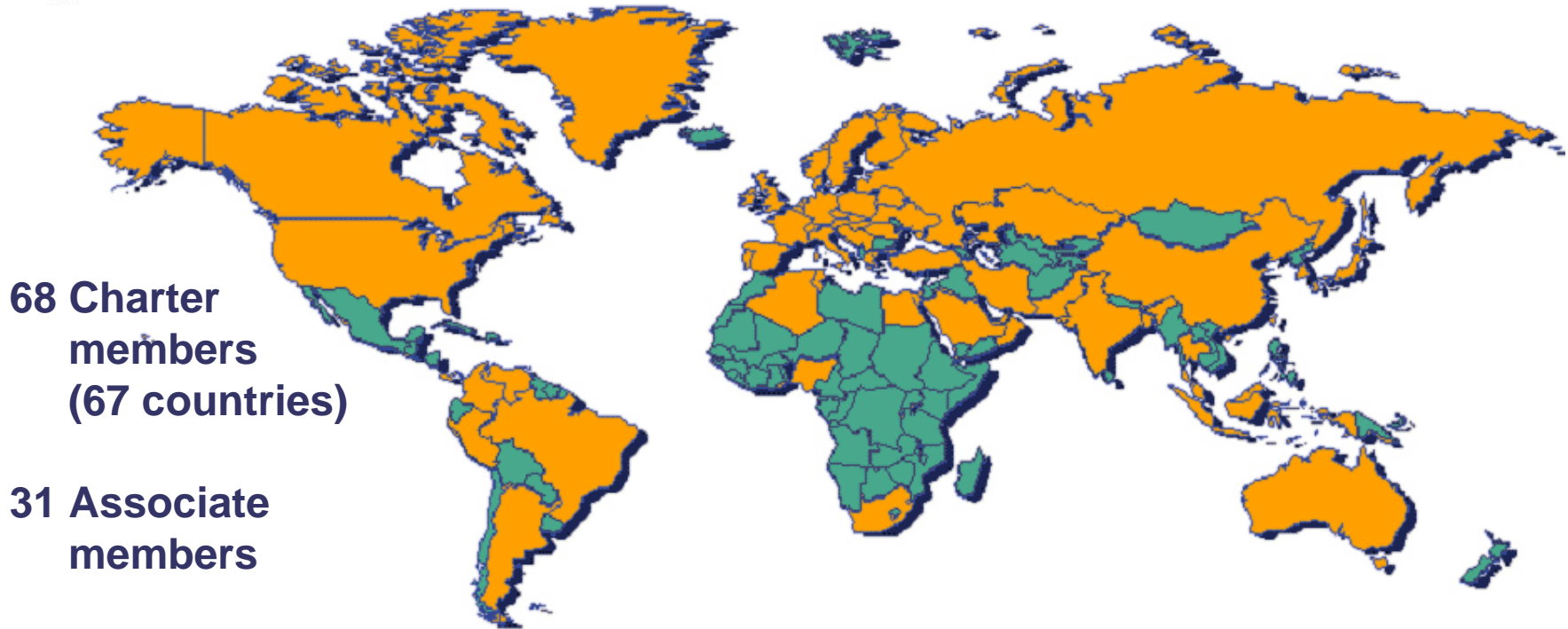
# IGU represents around 95% of all gas sales



Members Non Members



News, Views and knowledge on Gas - World Wide



Also gas companies can become member and benefit from IGU's vast networking opportunities



# IGU serves as a spokesman for the gas industry world wide



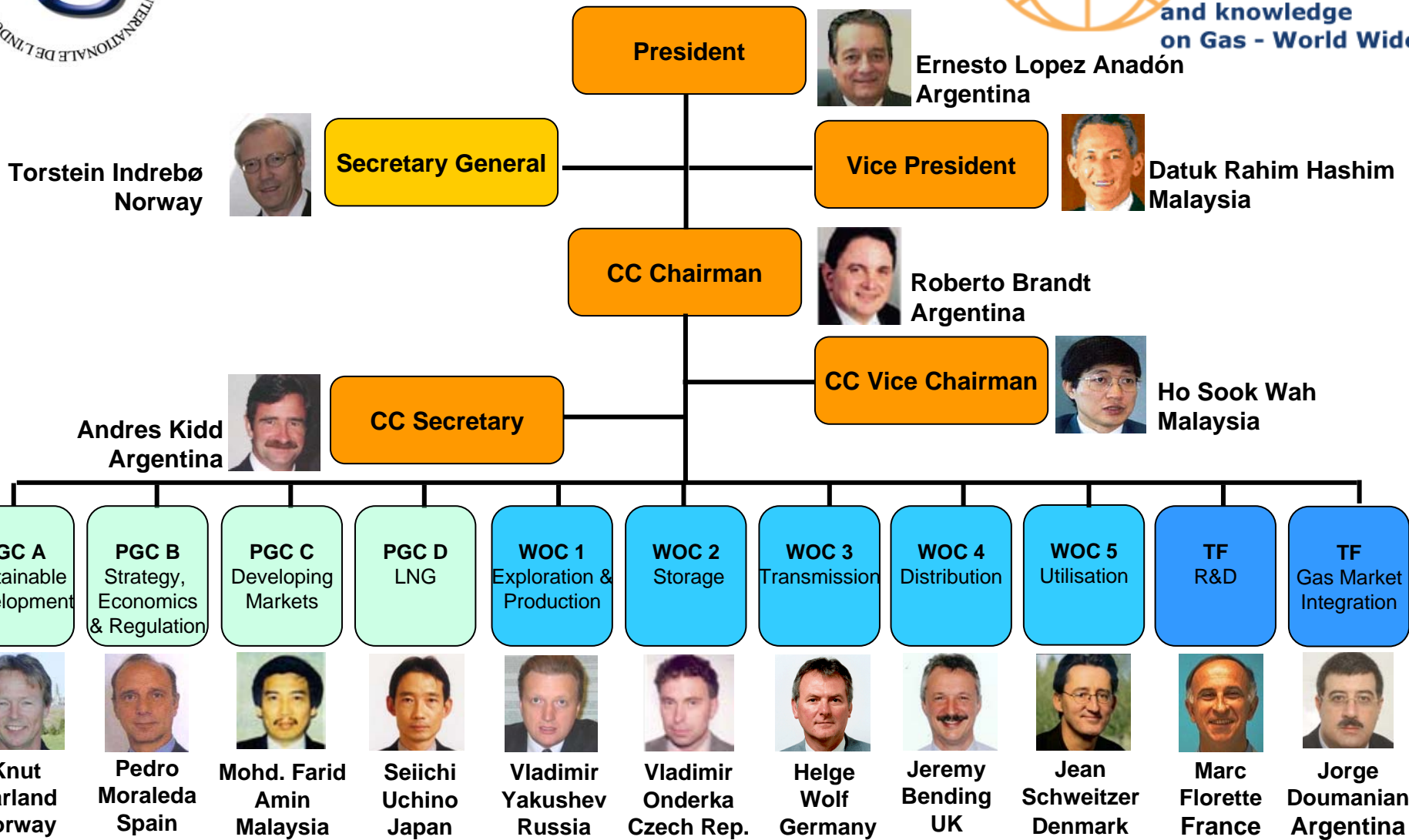
- World wide non–profit organisation since 1931
- Promotes technical and economic progress of the gas industry
- Geopolitics and strategy higher on the agenda
- Membership fee € 4,500/year



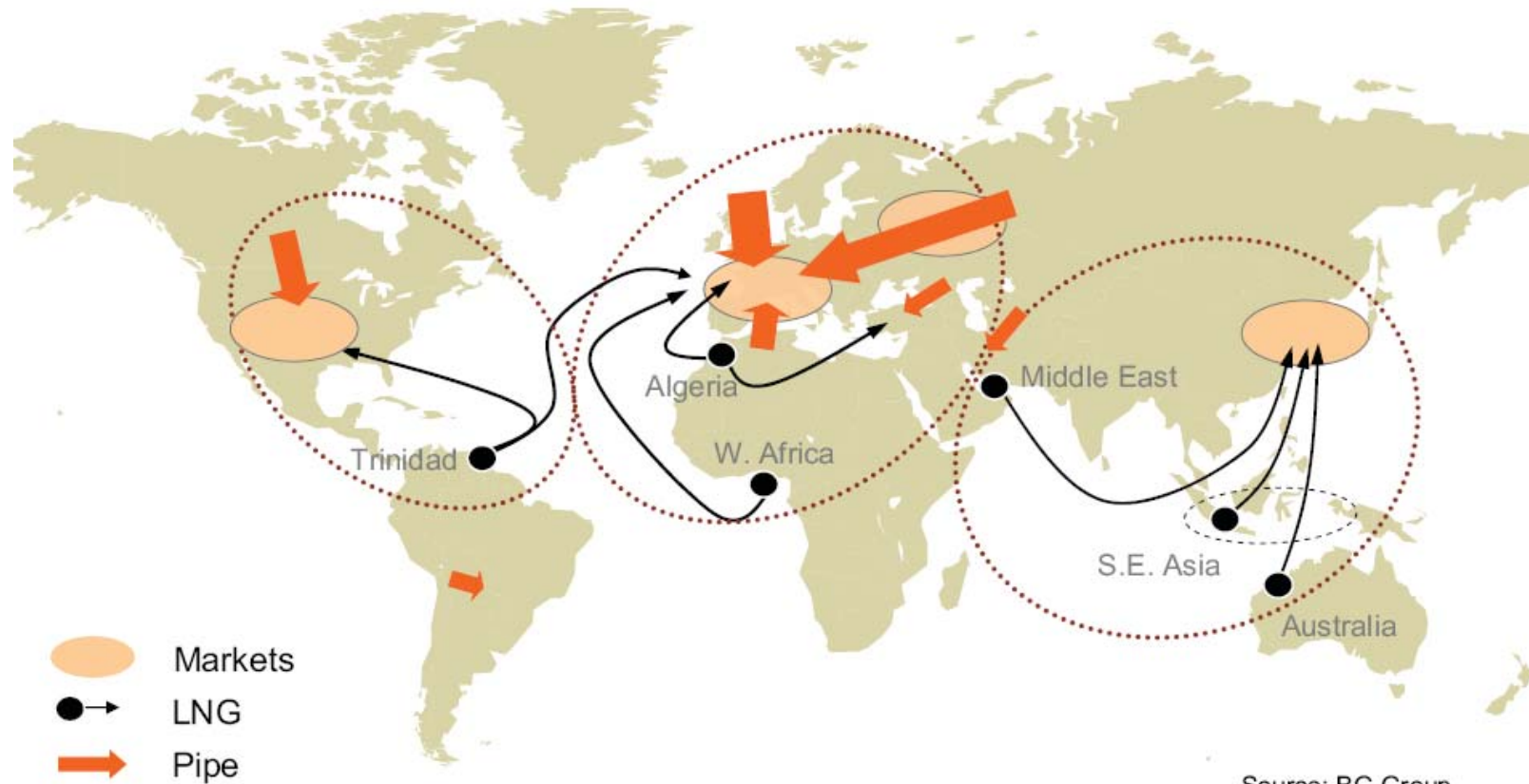
# Experts from all over the world are represented in the technical team



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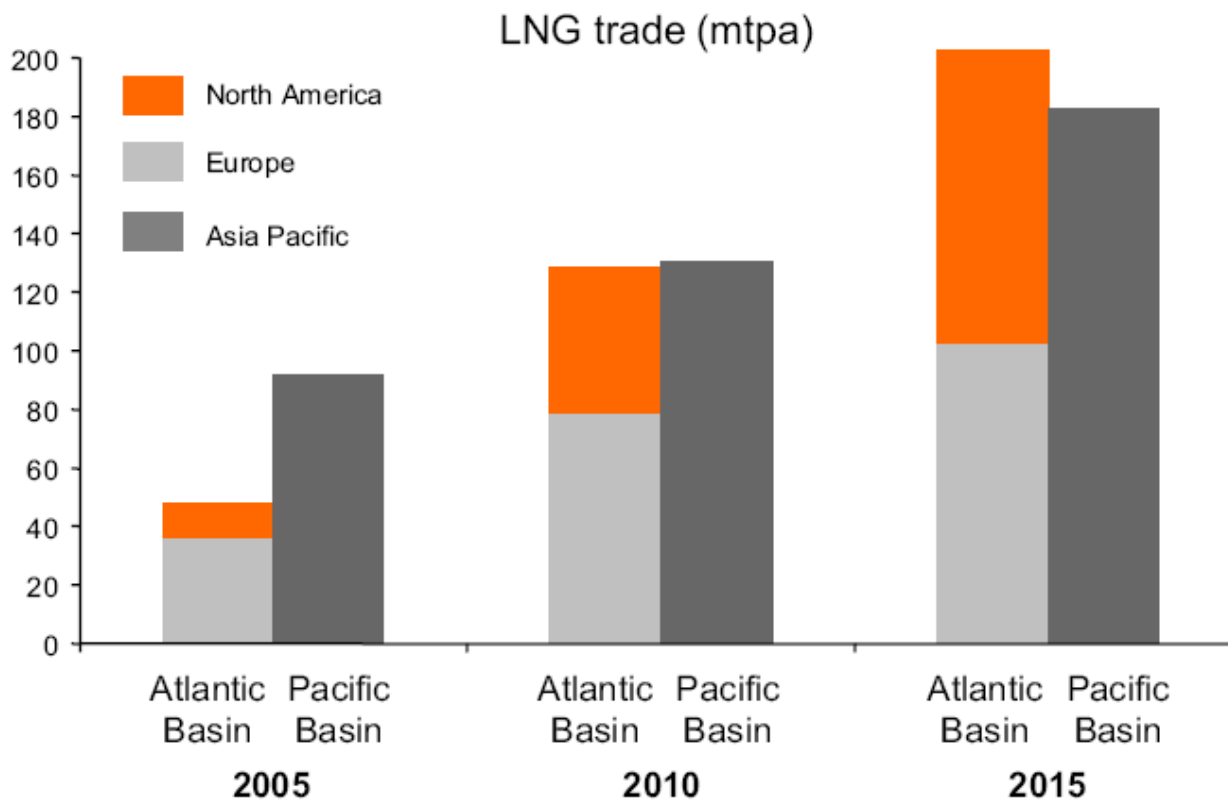
# Gas markets were regional in the recent past



Source: BG Group



# LNG is driving the change

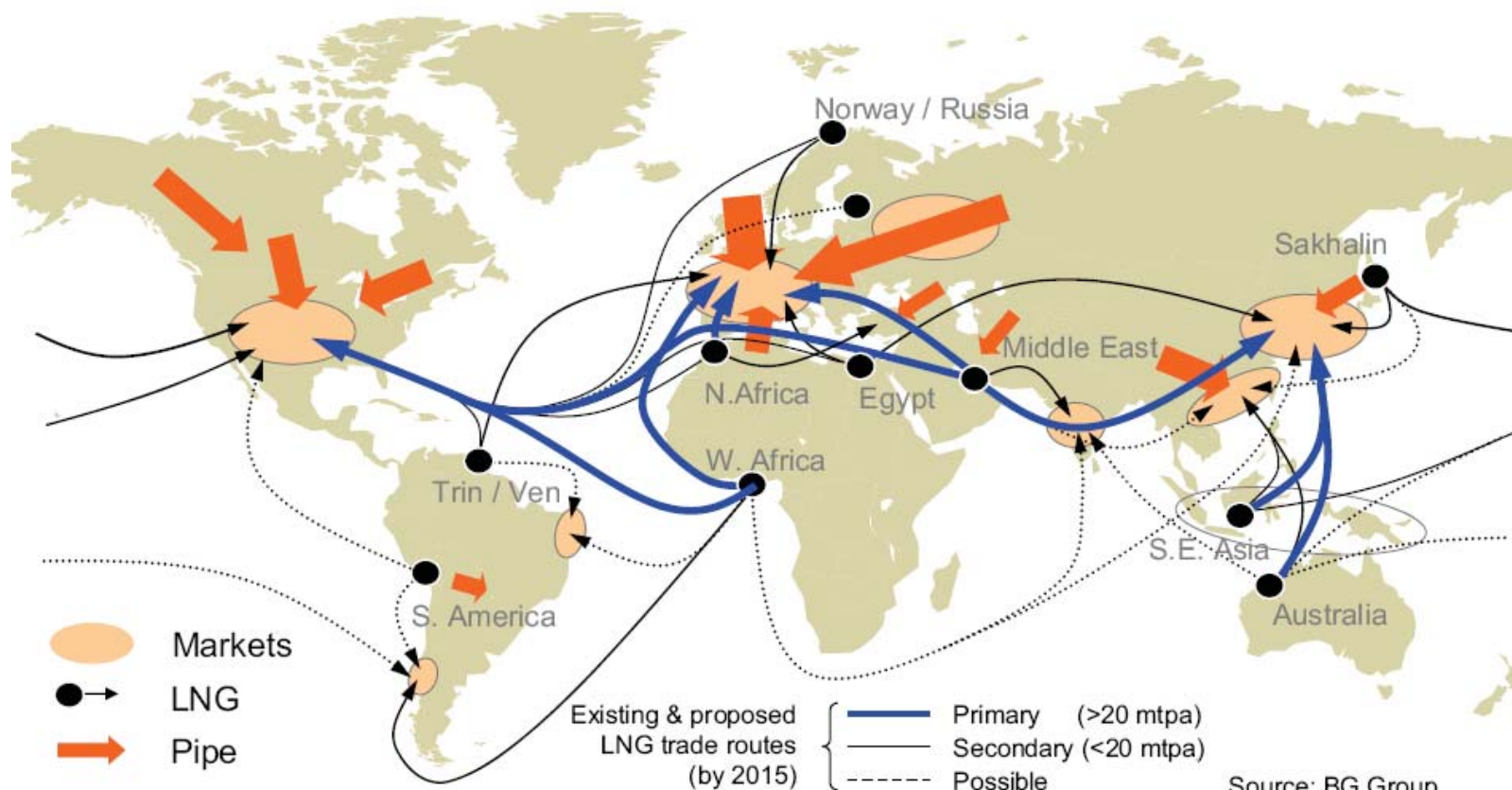


Source: Wood MacKenzie 2007





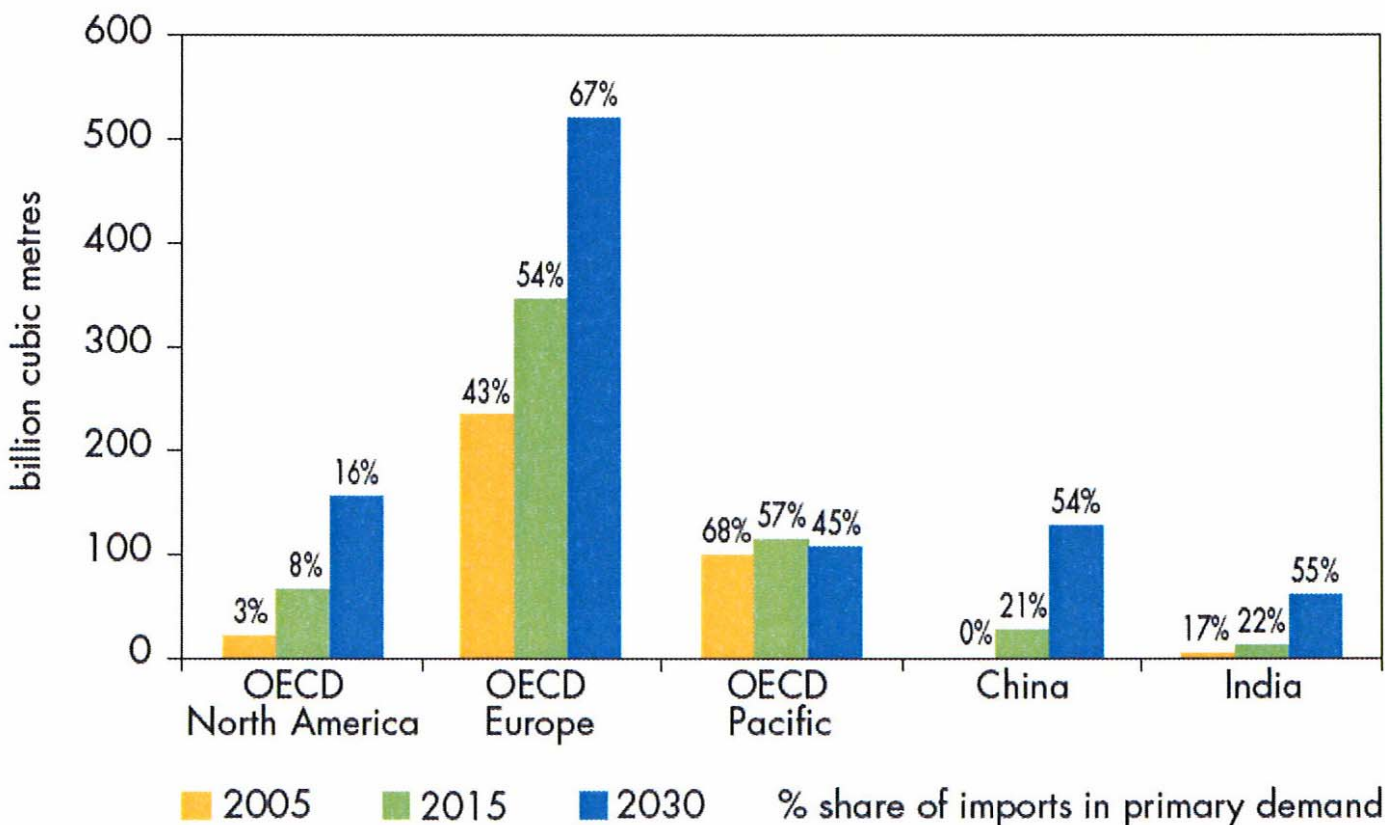
# Gas is going global...







*Figure 1.9: Net Imports of Natural Gas by Major Region in the Reference Scenario*



# Gas flows to highest priced markets



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# The climate challenge: Plus factors of gas



- Low carbon dioxide releases
- Efficient with combined cycle power
- Use in transportation sector
- Natural gas complements renewables
- Gas - the transition fuel in a sustainable world of energy



Source: With courtesy of E.ON  
Ruhrgas

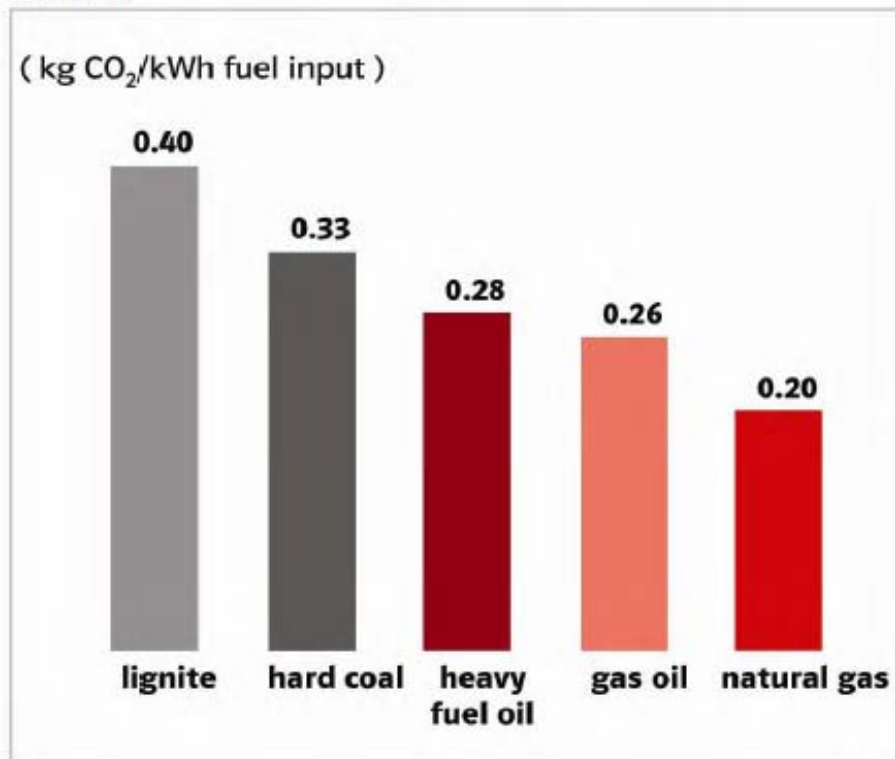




# Natural gas – lowest carbon content



## CO<sub>2</sub> formed by the combustion of fossil fuels:



# Access to new supplies more challenging



- Domestic demand versus export markets
- National policies– investment levels
- National policies – acreage
- Environmental concerns





# Importance of R&D activities



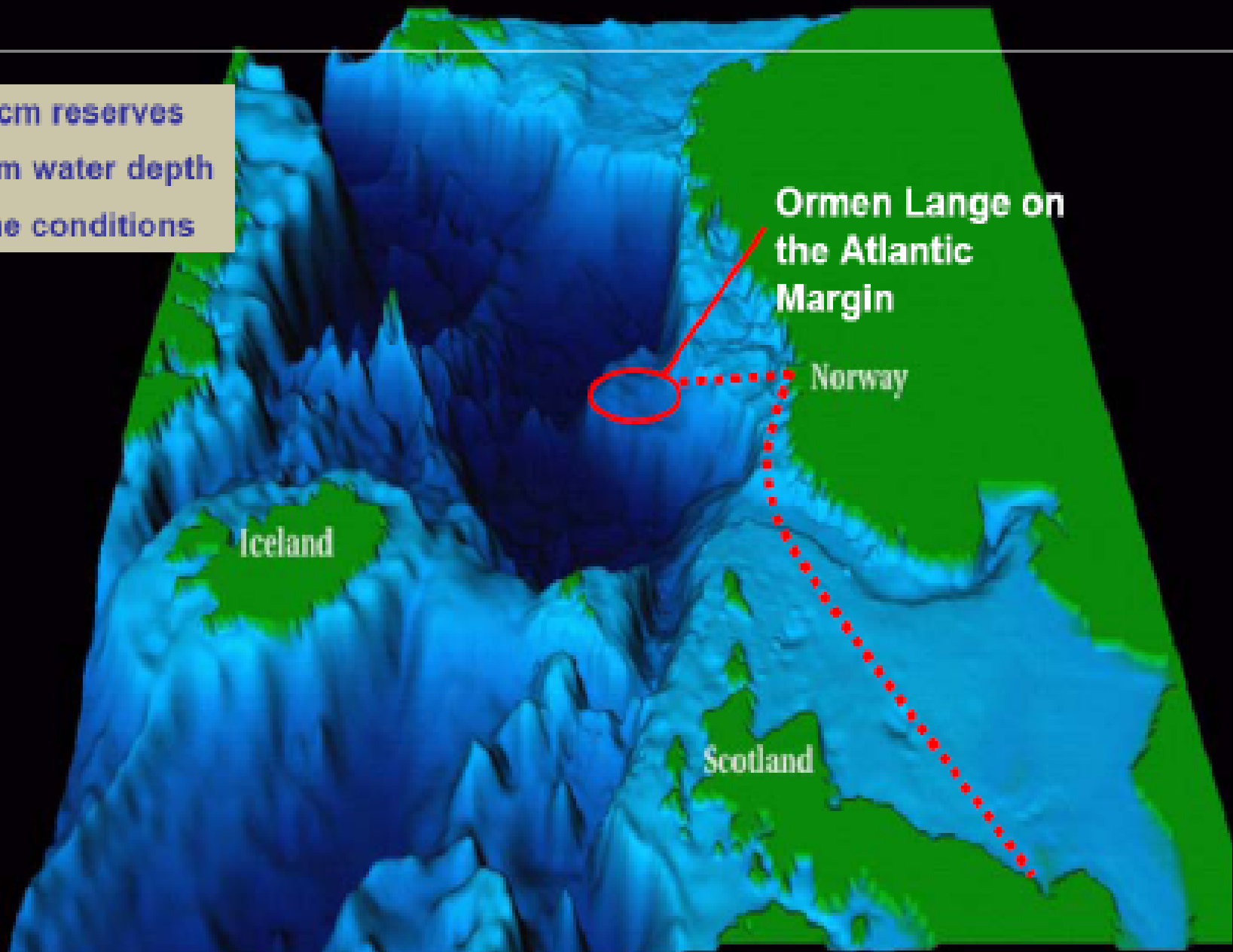
- From reservoir to market
- Carbon sequestration and storage
- Gas efficiency along the chain
- IGU Research Conference 2008 and 2010 in Korea





# Ormen Lange – the new gas giant for Europe

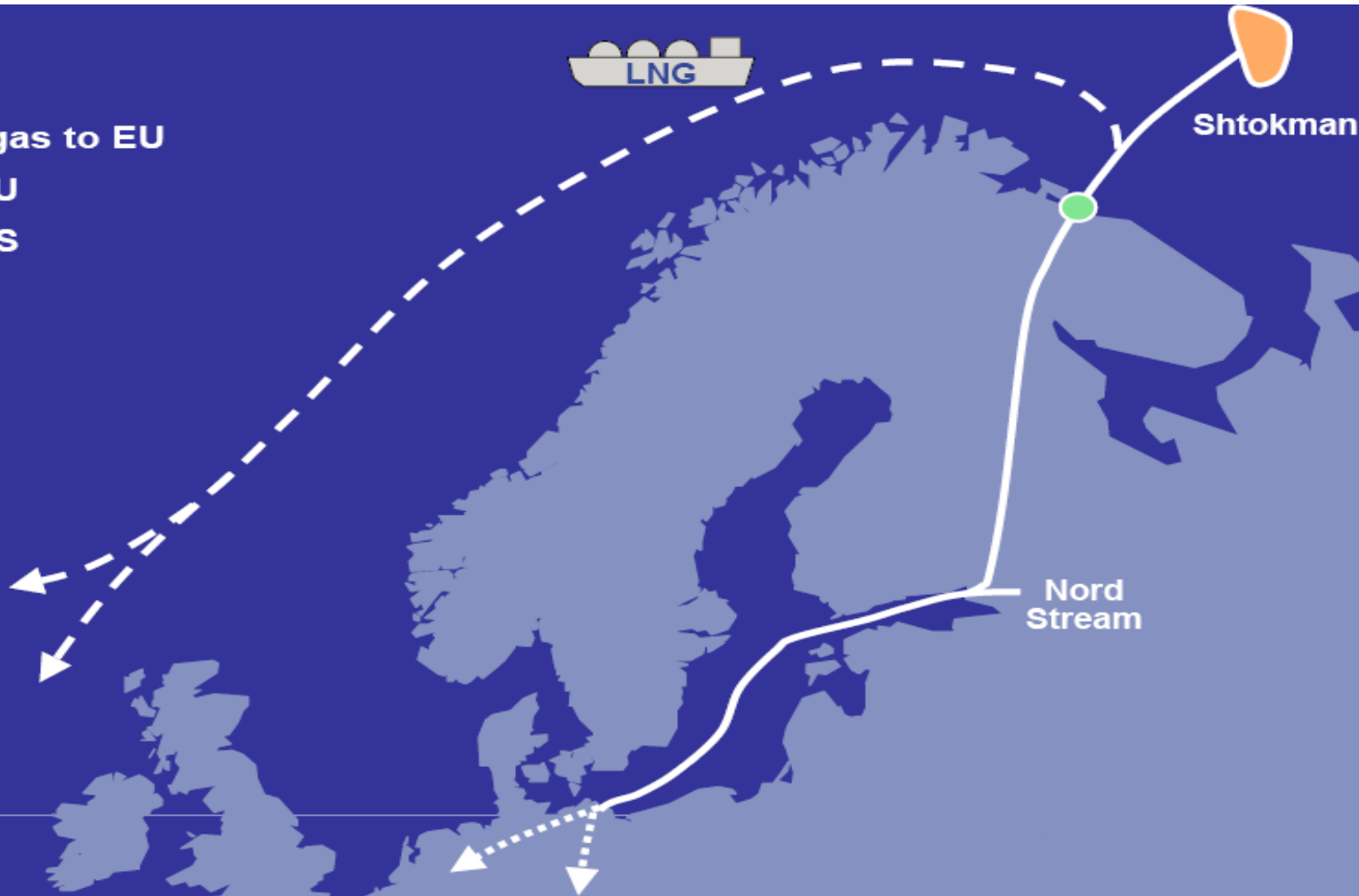
- ~400 bcm reserves
- ~1000 m water depth
- Extreme conditions



# The Shtokman-project - risk management critical



- Pipeline gas to EU
- LNG to EU
- LNG to US







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