



The case for natural gas

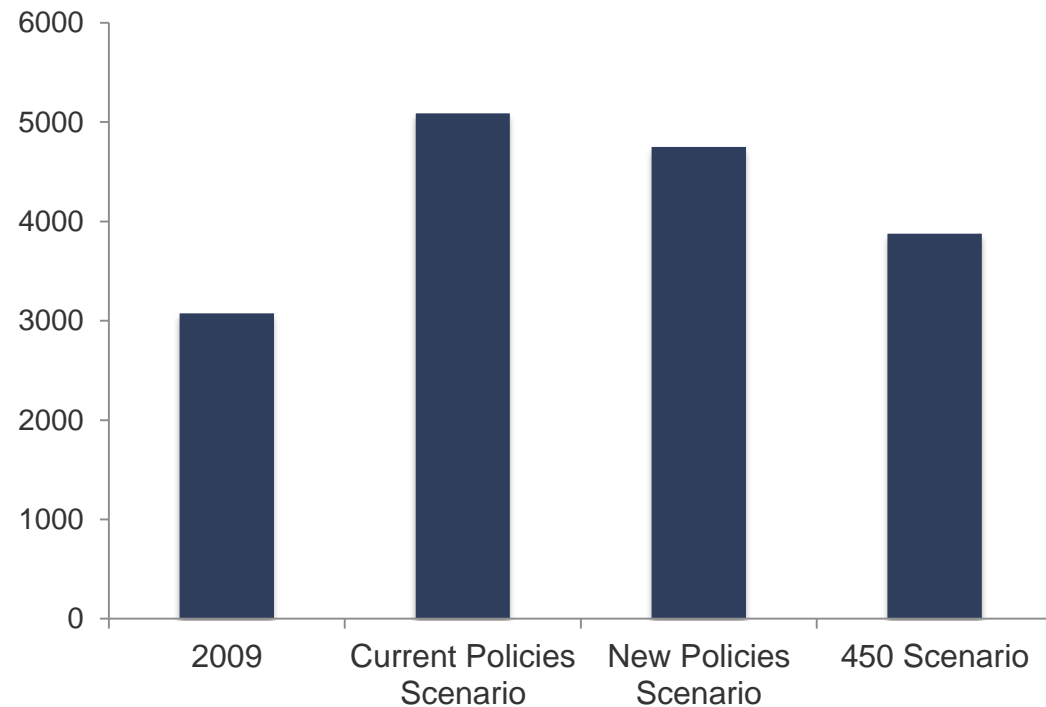
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Gas is a winning fuel

- Gas growth in all IEA Scenarios
- Strongest growth outside the OECD
- Global demand increase of 6.6% in 2010;
 - 6% in OECD
 - 19% in China

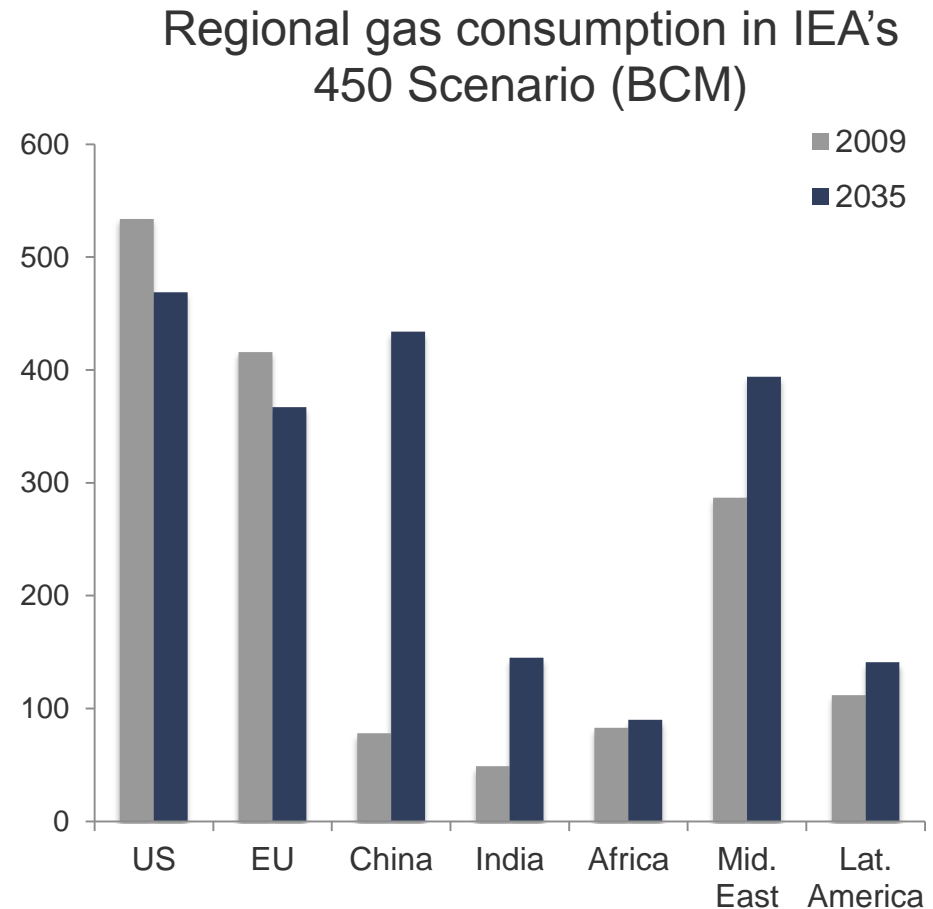
Production 2009 and scenarios for 2035 (BCM)



Source: IEA World Energy Outlook 2011

Gas is a global fuel

- Decline from a high level in OECD countries
- Increased gas penetration in non-OECD
- China a bigger gas consumer than the EU in 2035
- Need to develop more than 2000 BCM in new capacity



Source: IEA World Energy Outlook 2011

Gas is an enabler

- Flexibility in power generation
- Biogas
- Transport
- Residential heating



Concluding remarks



- Gas is a winning fuel – robust against new policy directions
- Gas is a global fuel – increasingly available and affordable worldwide
- Gas is an enabler – allowing the world to move towards a low-carbon future