

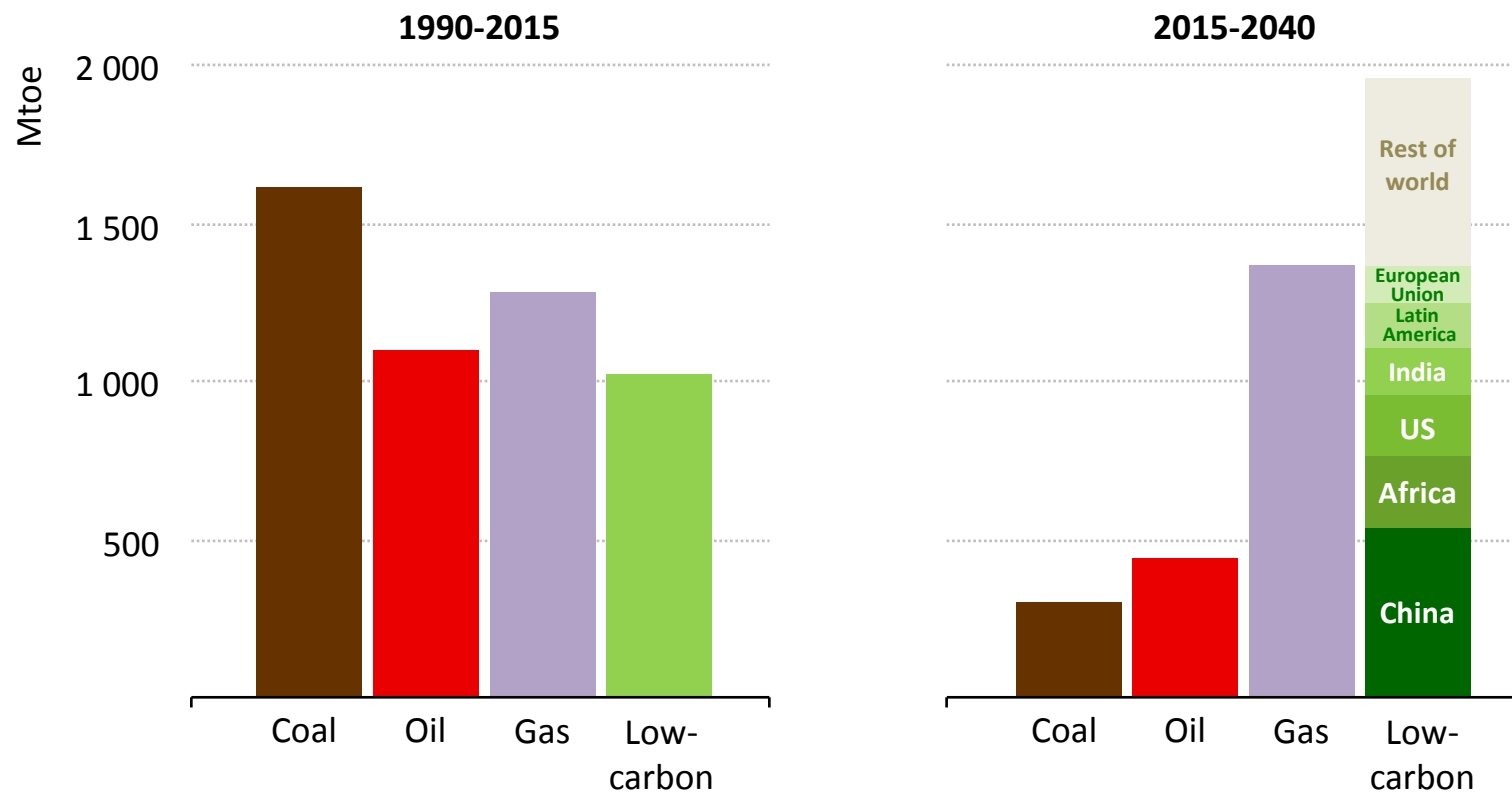
World Energy Outlook 2016

UNECE Group of Experts on Gas
Geneva, Switzerland
28 March 2017

Dr Christophe McGlade

A new 'fuel' in pole position

Change in total primary energy demand

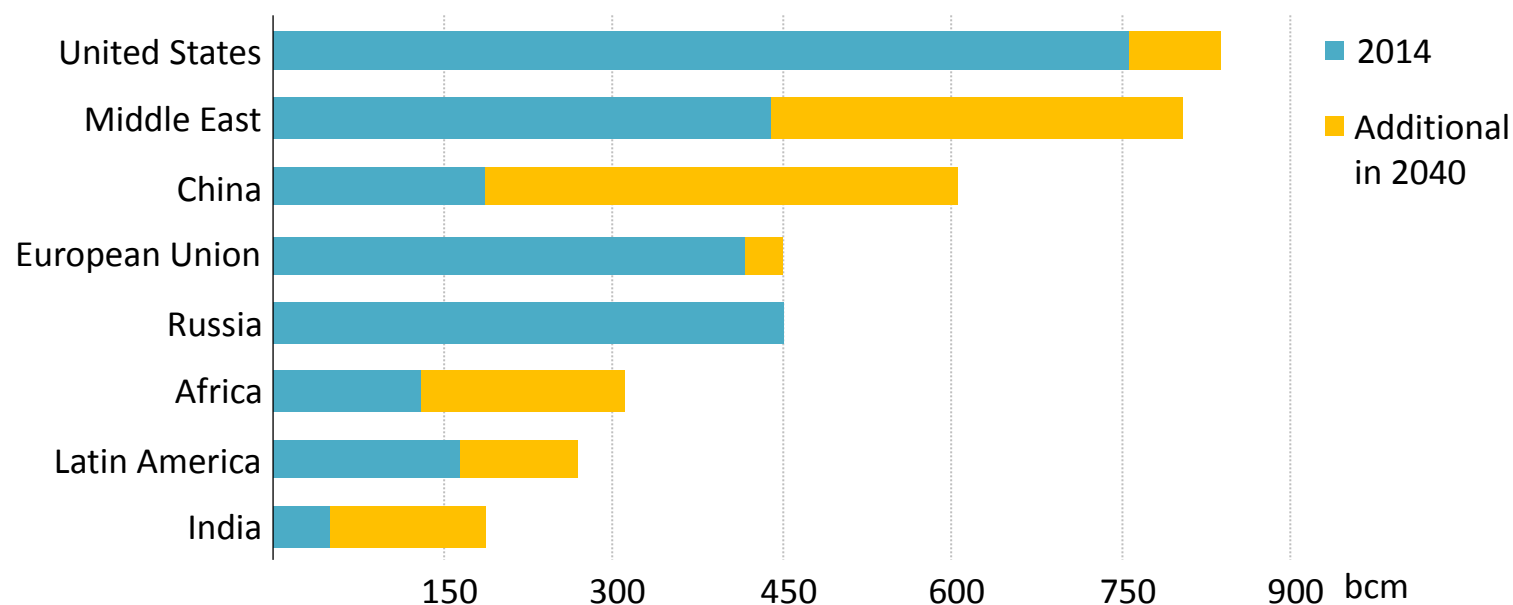


Low-carbon fuels & technologies, mostly renewables, supply nearly half of the increase in energy demand to 2040

Demand growth: a question of geography

World
Energy
Outlook
2016

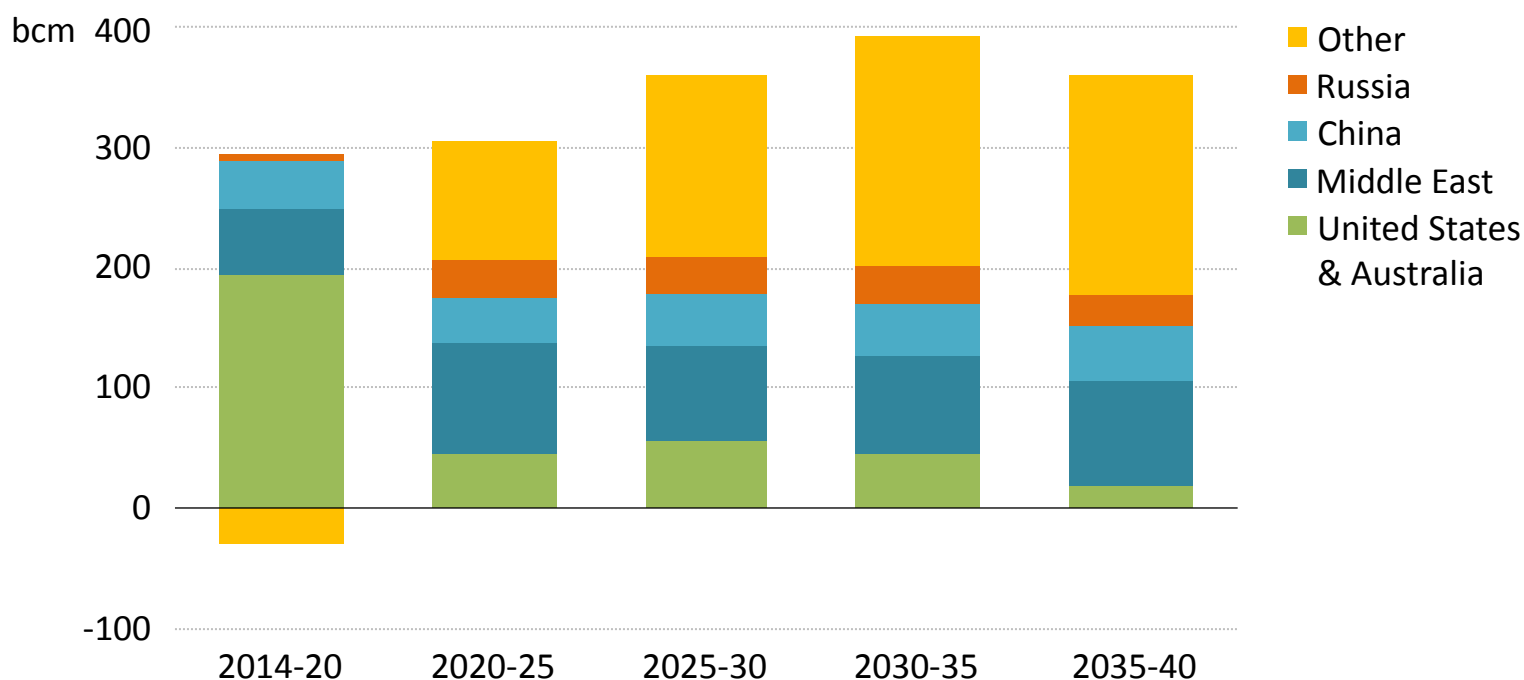
Gas demand by selected regions in the New Policies Scenario



Developing countries lead the growth in global gas demand

Not quite the usual suspects

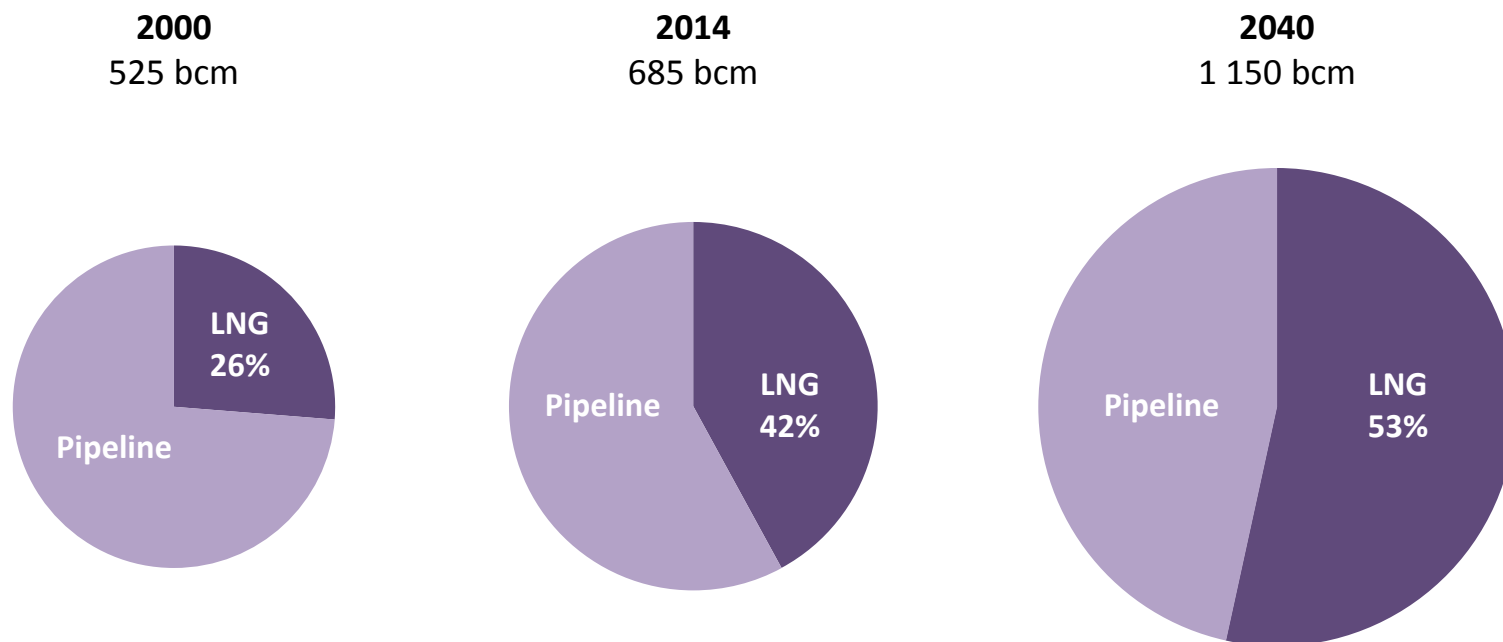
Change in gas production by selected region in the New Policies Scenario



A rising share of gas production growth will soon need to come from countries whose combined output falls in the medium term

A wave of LNG spurs a second natural gas revolution

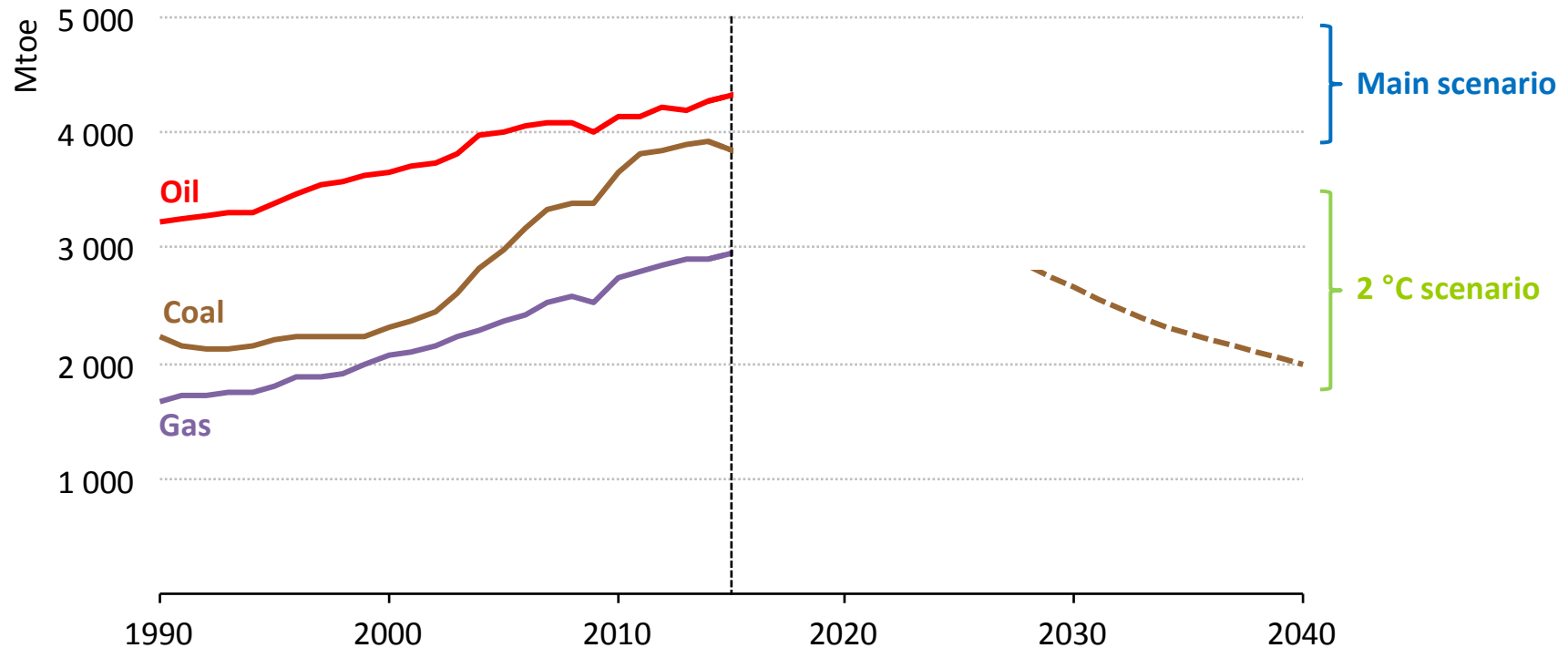
Share of LNG in global long-distance gas trade



Contractual terms and pricing arrangements are all being tested as new LNG from Australia, the US & others collides into an already well-supplied market

Fossil fuels in a decarbonising system

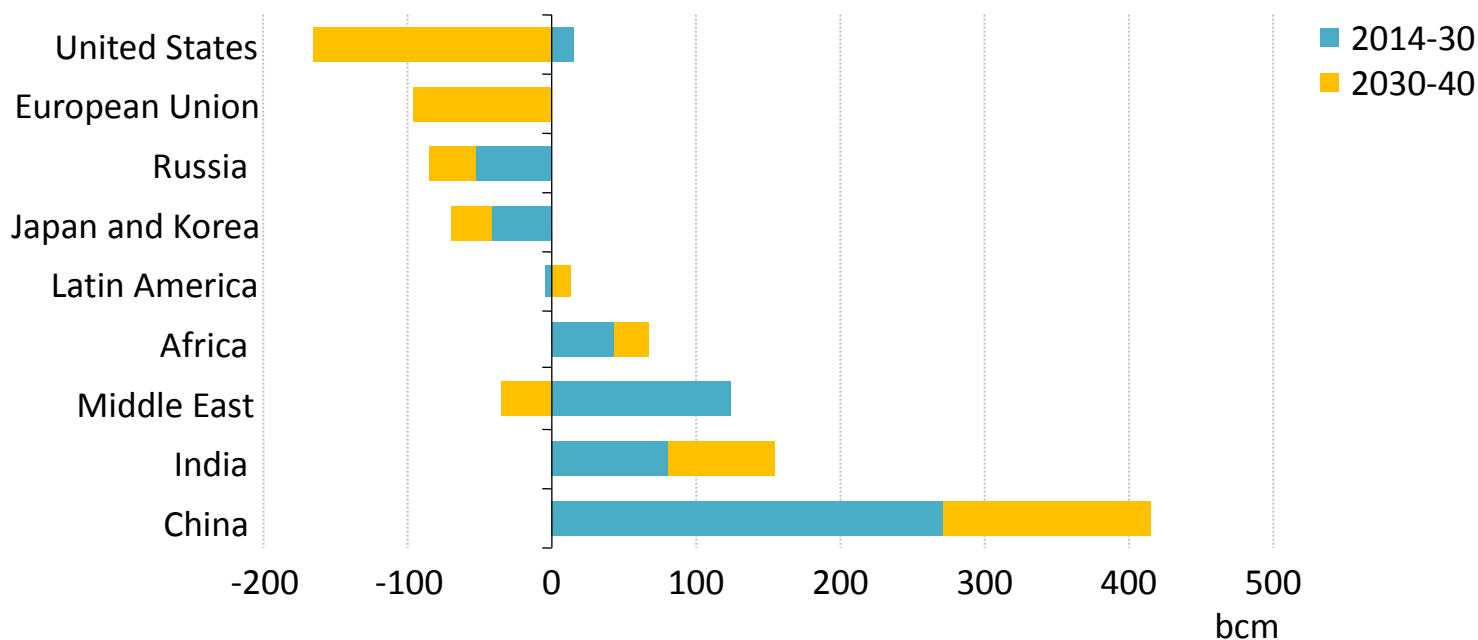
Energy demand by fuel & scenario



***Coal is hit hardest in a 2 °C scenario & oil demand peaks before 2020:
only consumption of natural gas ends up higher than today***

Gas plays different roles in the transition to a 2 °C world

Change in gas demand in selected regions in the 2 °C Scenario



Fuel switching plays a key role in the period to 2030 but efficiency gains and power sector decarbonisation reduce gas demand growth in the long term