

# Natural Gas: Fueling the Future

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**David C. Carroll**  
**President, IGU**

Sedigas Annual Meeting  
30 May 2017



# Members Serve 97% of World's Gas Market



90 Charter Members  
62 Associate Members  
Founded in 1931

IGU Secretariat  
Barcelona, Spain

Presidency 2015-2018  
Washington, DC USA  
South Korea 2018-2021

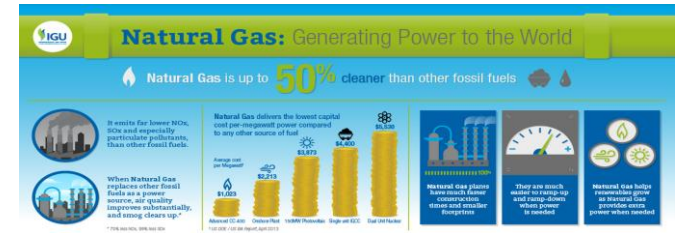
# Our “Nueva Casa” in Barcelona



**IGU Secretary General  
Mr. Luis Bertran**

# An Inspiring Vision

**“As the global voice of gas,  
IGU seeks to improve quality of life by  
advancing gas as a key contributor to a  
sustainable energy future”**



[www.igu.org](http://www.igu.org)



**27th WORLD GAS CONFERENCE**  
WASHINGTON DC

**JUNE 25-29 2018**

IGU



A low-angle, upward-looking photograph of the Eiffel Tower at night. The tower's intricate lattice structure is illuminated with warm yellow lights, creating a glowing effect against the dark sky. A prominent blue diagonal banner cuts across the middle of the image, containing white text. Below the banner, the words 'FOR THE PLANET' are written in white, spaced-out capital letters across the tower's structure.

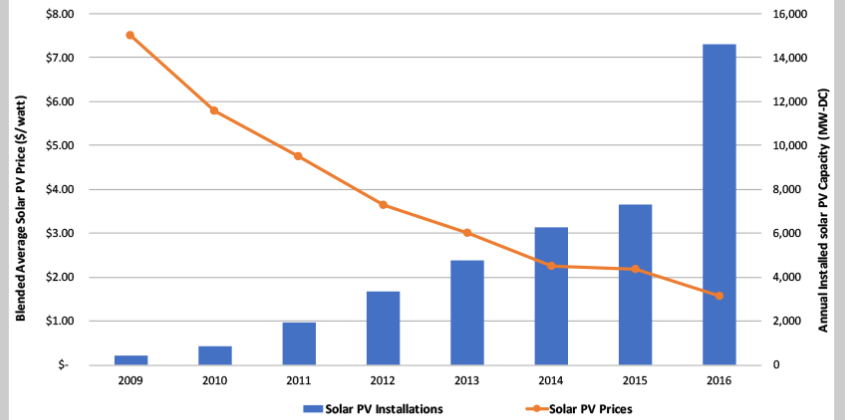
**COP 21 – A Call to Action**

**FOR THE PLANET**

# Gas Enables the Energy Transition



# Renewables are Advancing ....



© 2017

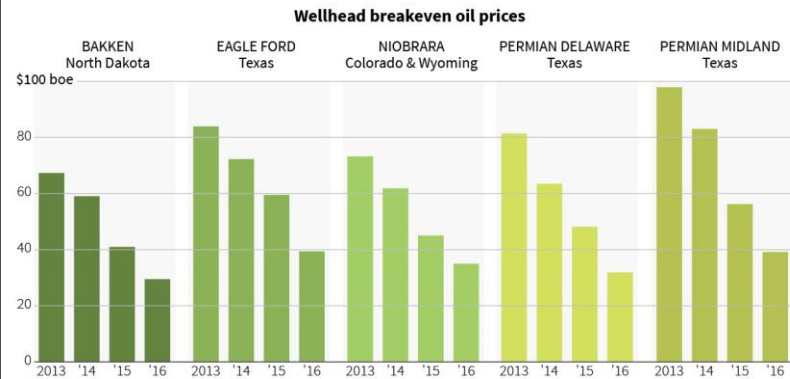
gtmresearch

SEIA  
Solar Energy  
Industry  
Association



# As is Shale

## The falling cost of U.S. shale production

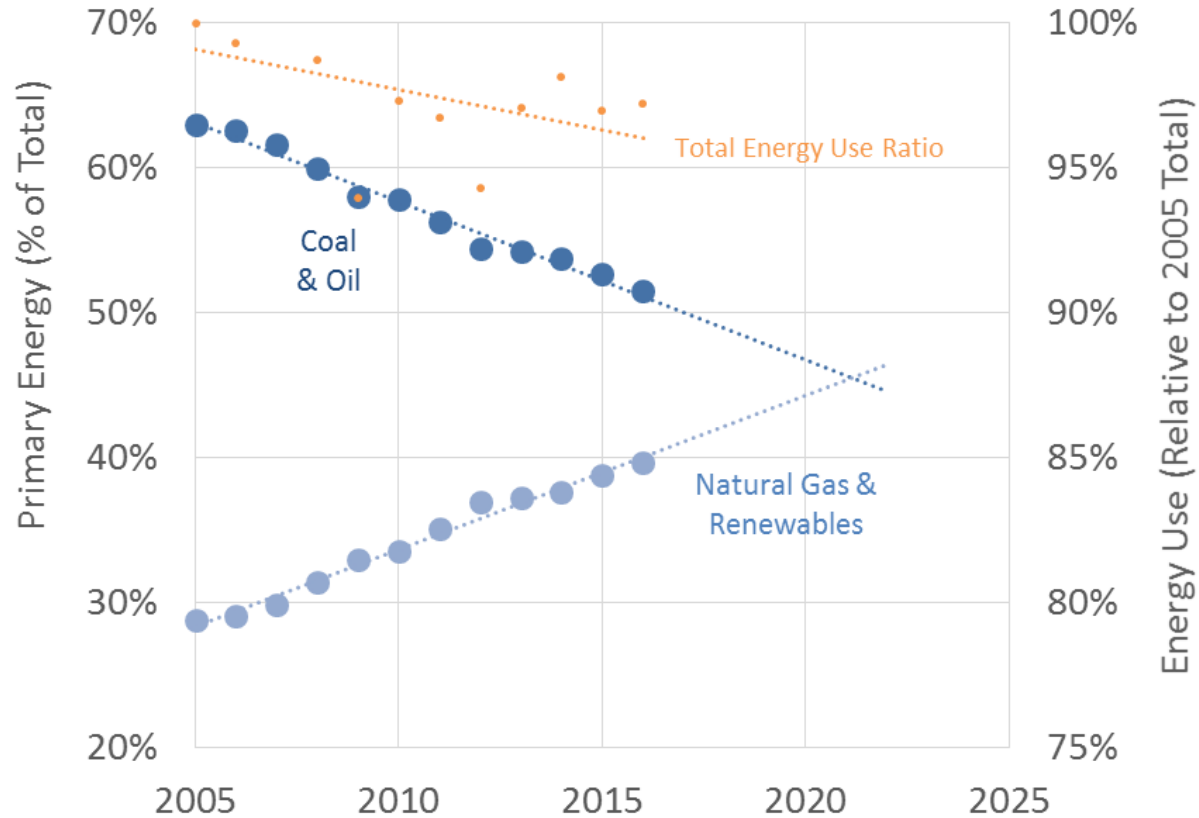


Source: NASWellCube  
S. Culp, 29/11/2016

REUTERS



# U.S. Primary Energy Consumption Trends



# Improving Air Quality



# New Transportation Markets



**ENGIE/NYK/MC "ENGIE ZEEBRUGGE"**  
Courtesy of ENGIE, Mitsubishi Corporation and NYK





# Addressing Energy Poverty



# Methane Emissions

Reducing our Impact





### CASE STUDIES IN IMPROVING URBAN AIR QUALITY



### CASE STUDIES IN IMPROVING URBAN AIR QUALITY

2016



### CASE STUDIES ENABLING CLEAN ENERGIES

# IGU Publications



### ENABLING CLEAN MARINE TRANSPORT

MARCH 2017

PREPARED FOR THE G20 ENERGY SUSTAINABILITY WORKING GROUP



### IGU 2017 World LNG Report Gastech 2017 Conference & Exhibition Edition



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### 5<sup>th</sup> IEF-IGU GAS MINISTERIAL GAS FORUM

NEW DELHI • INDIA  
GAS FOR GROWTH: IMPROVING ECONOMIC PROSPERITY AND LIVING STANDARDS



Government of National Capital Territory of Delhi





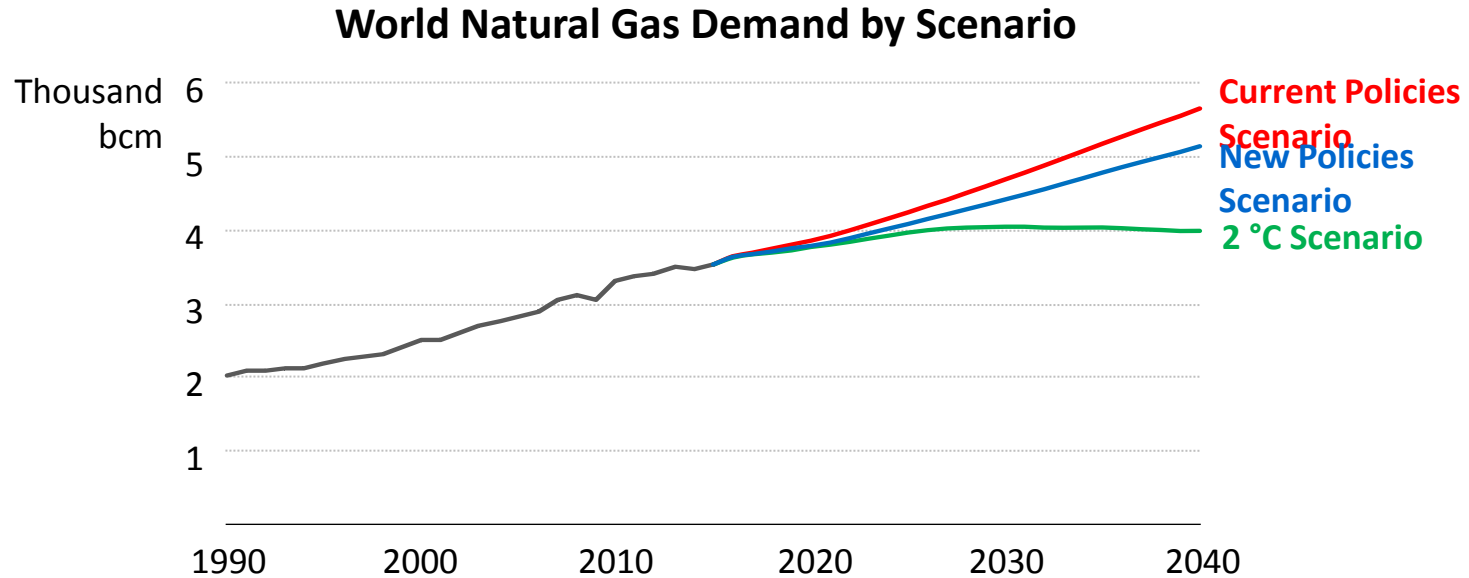
# Engaging Policy Makers Across the Globe



**5<sup>th</sup> IEF-IGU Ministerial Gas Forum**  
**Gas for Growth**  
Improving economic prosperity and living standards



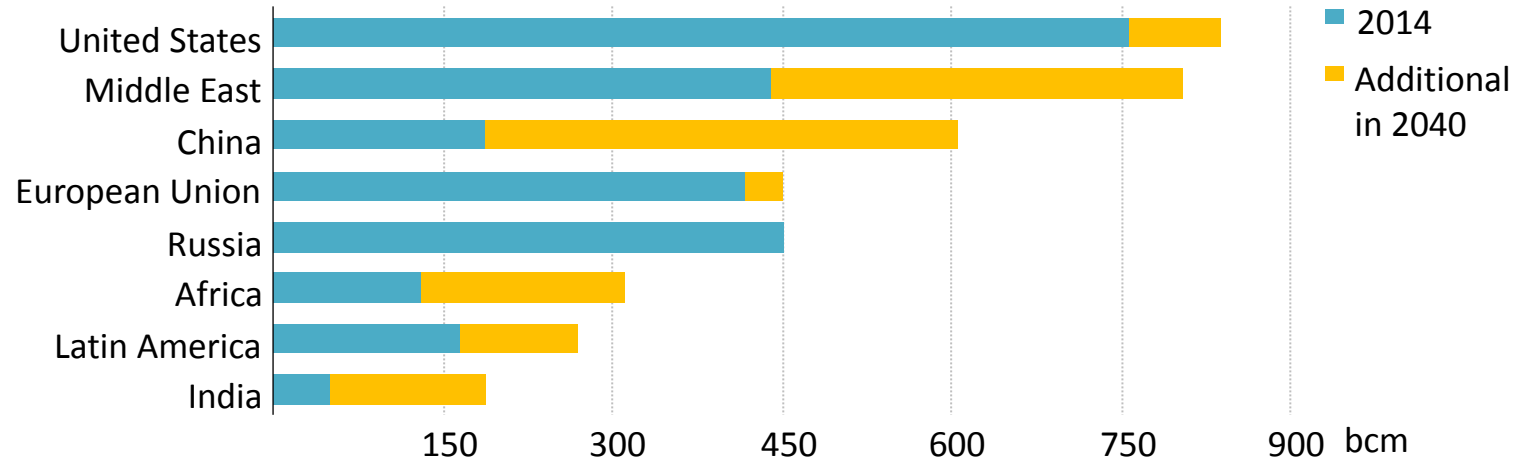
# A Growth Story for Natural Gas



***Global gas demand is projected to plateau from the late-2020s in the 2 °C Scenario***

# Gas Demand Growth: A Question of Geography

## Gas Demand by Selected Regions in the New Policies Scenario

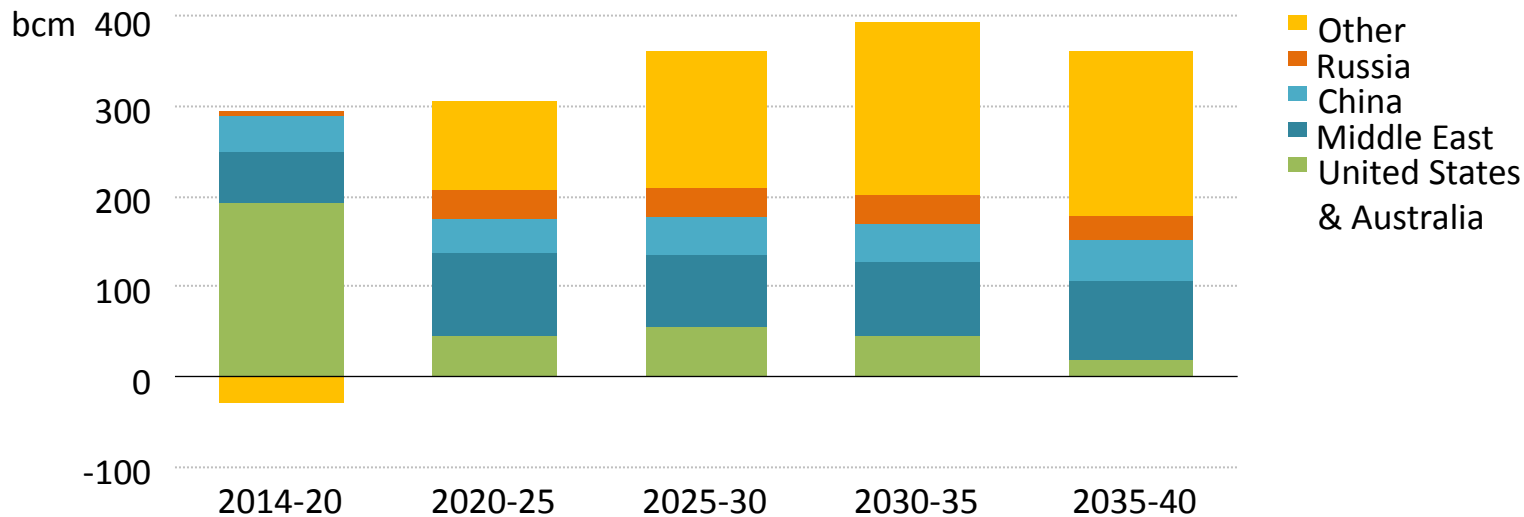


***Developing countries lead the growth in global gas demand***



# Not Quite the Usual Suspects

## Change in Gas Production by Selected region in the New Policies Scenario



***By the 2020s, a rising share of gas output growth needs to come from a new cast of producers, such as East Africa & Argentina***

# Closing Thoughts on Energy Transition

- Address climate change and air quality with urgency
- Gas should play important role; need enlightened policies
- Governments provide direction, let markets respond
- More investment in technology
- Tireless focus by our industry on social license



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