Responsible Unconventional Gas and Oil Production

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Deglobalization of gas markets

Avg. gap in 2011: USD 5.8/MBtu
Avg. gap in 2011: USD 5.0/MBtu

Source: ICE, EIA, IEA, German Customs, Japanese Customs, McCloskey
Fracturing the status quo

Natural gas supply growth in the Golden Rules Case, 2010-2035

Combined unconventional gas output growth from the United States, China & Australia surpasses that of all conventional producers - mainly the MENA region & Russia
Rolling back shale gas production would lead to a less secure and less sustainable energy system.

Selected natural gas trade volumes, 2035

Gas trade in the Low Unconventional Case is up 30%, some trade patterns are reversed, gas prices are higher & the position of the main conventional exporters reinforced.
Hydraulic fracturing can be done safely, but ‘golden rules’ are essential to maintain social acceptance.
Americas Drive Growth in Non-OPEC Oil Supply
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