

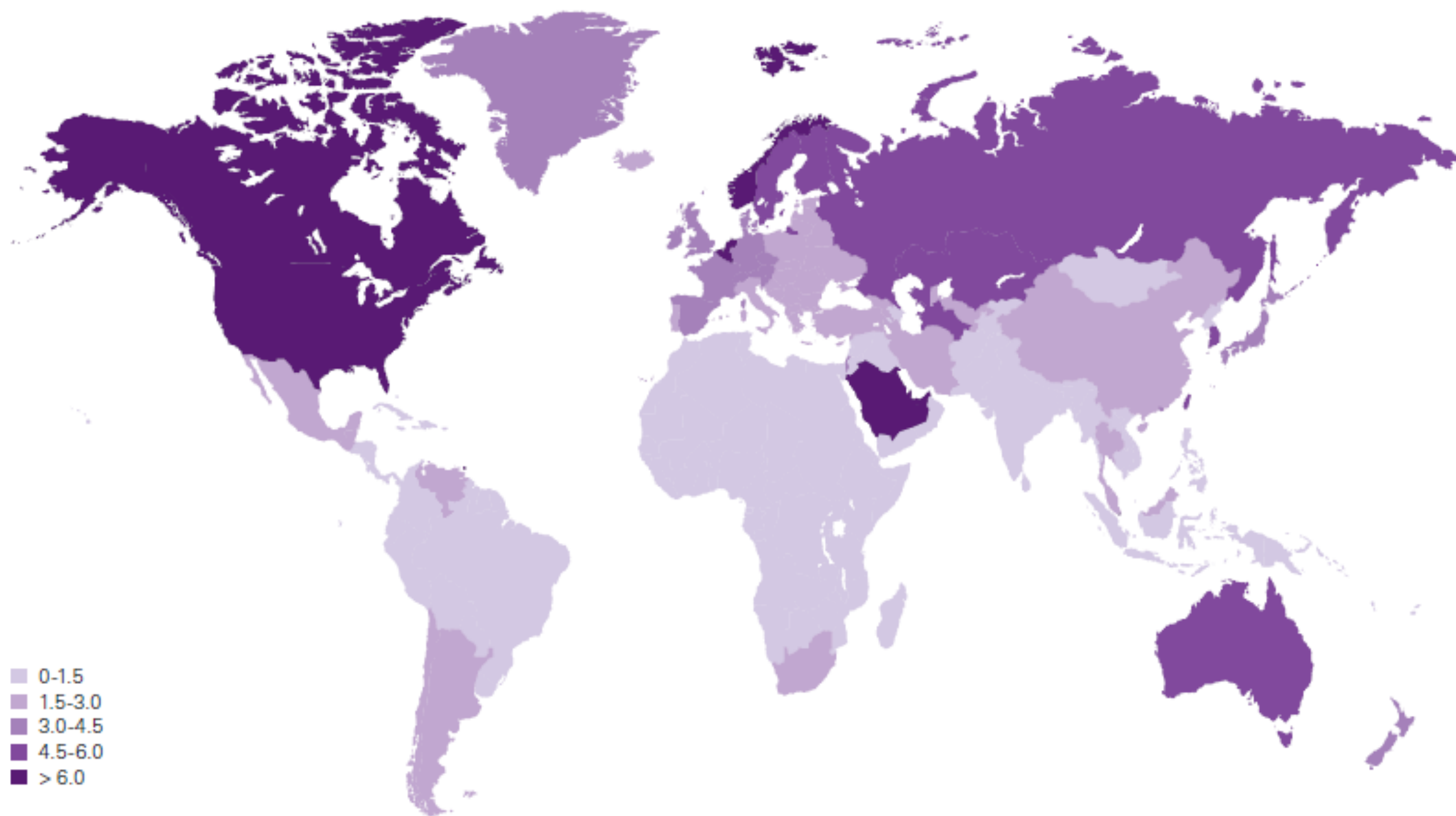
Shale Gas – Gift or Curse?

John Miles,
Arup/Cambridge University
Chairman - Independent Task Force on Peak Oil and Energy Security



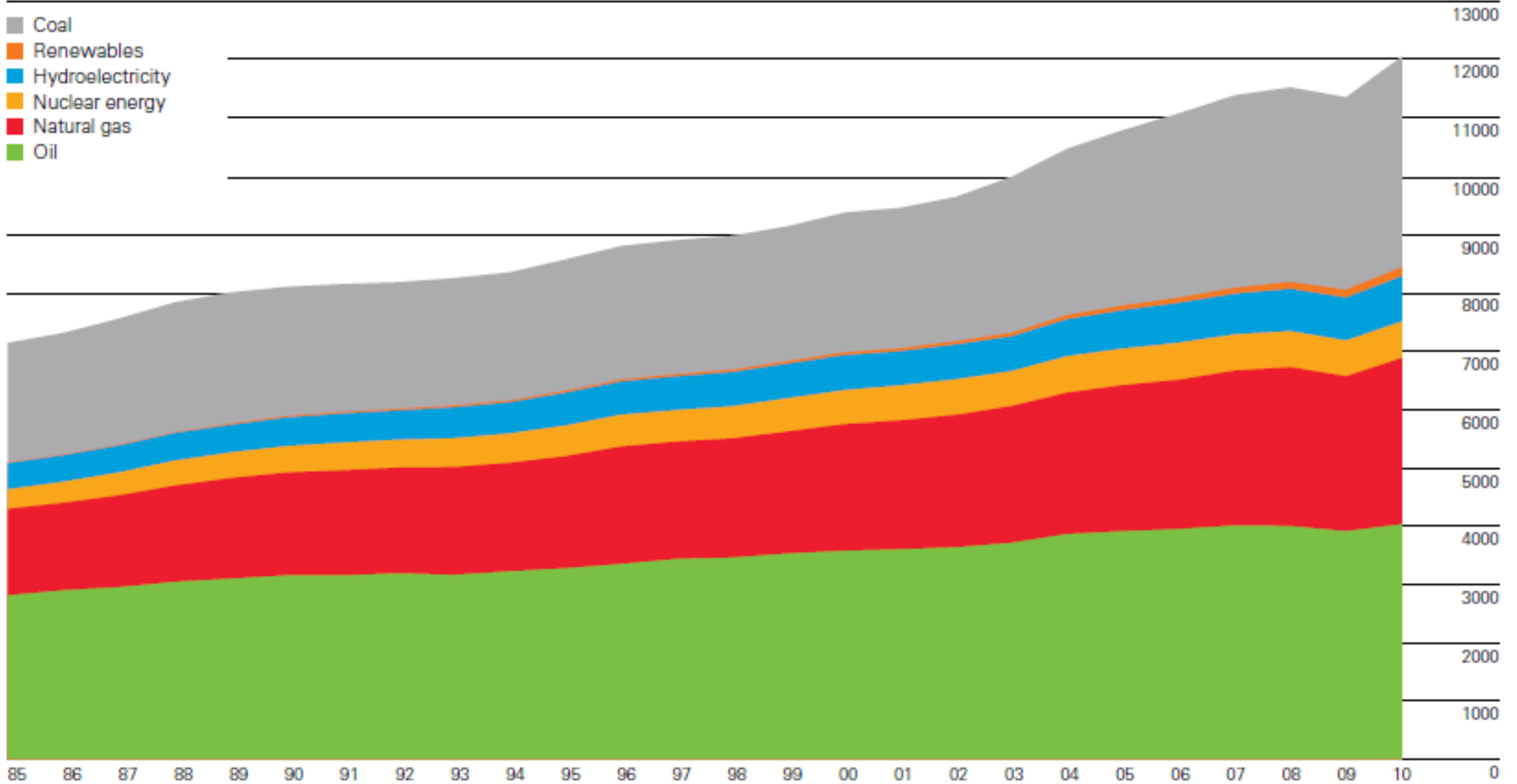
Consumption per capita 2010

Tonnes oil equivalent



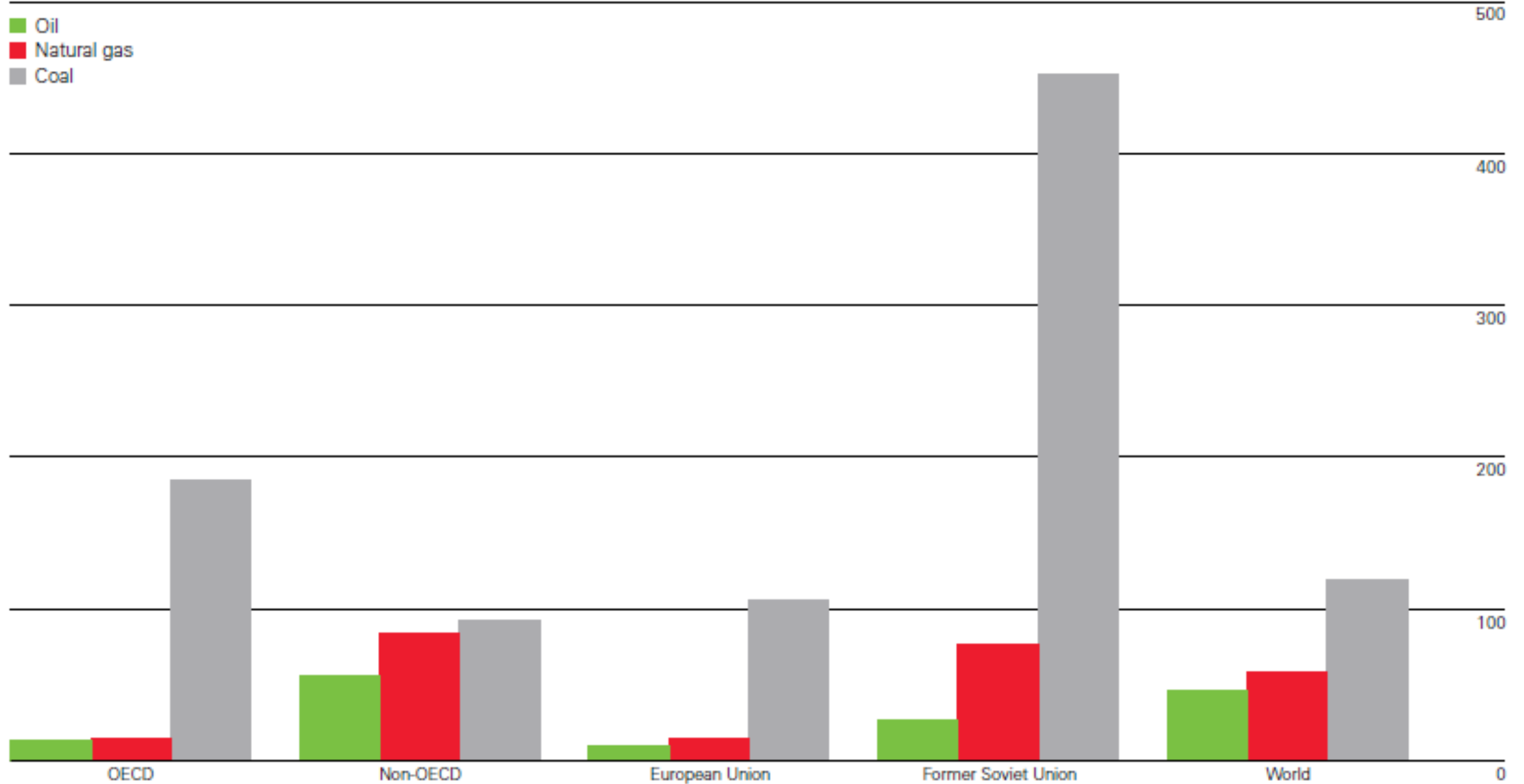
World consumption

Million tonnes oil equivalent

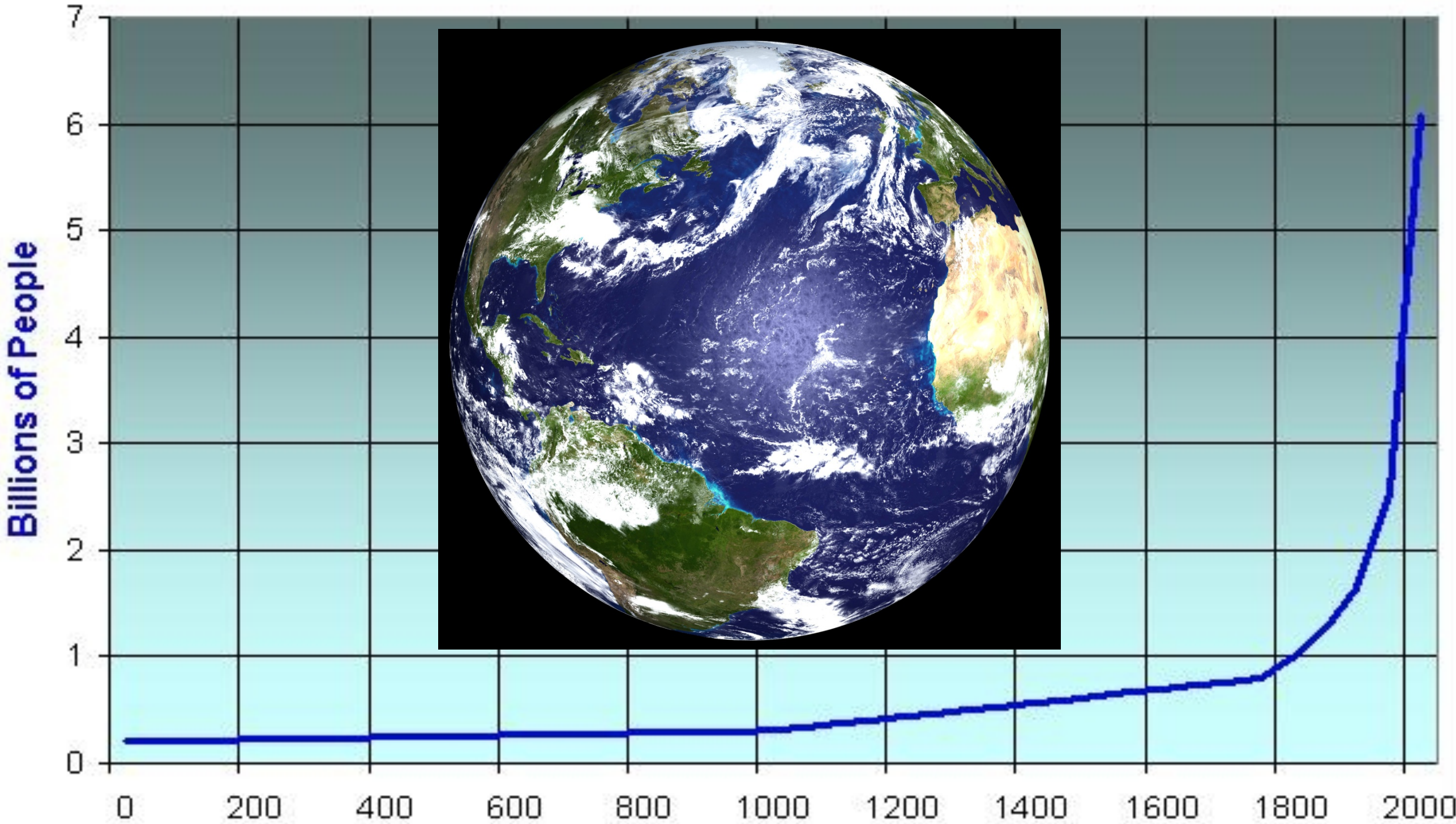


Fossil fuel reserves-to-production (R/P) ratios at end 2010

Years



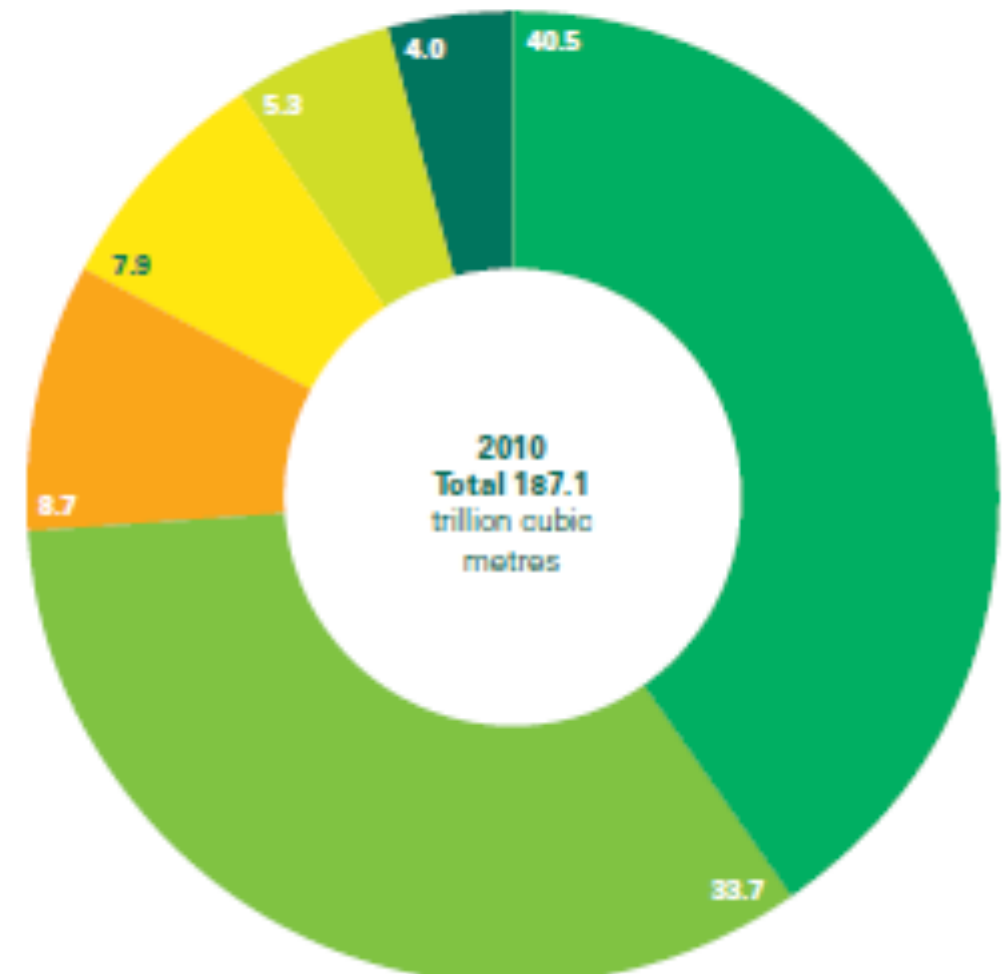
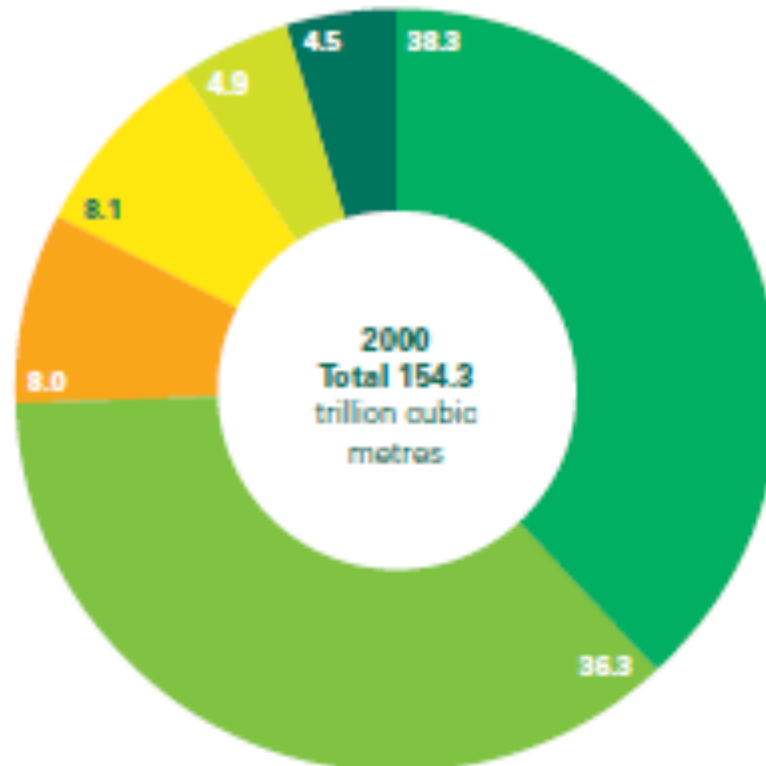
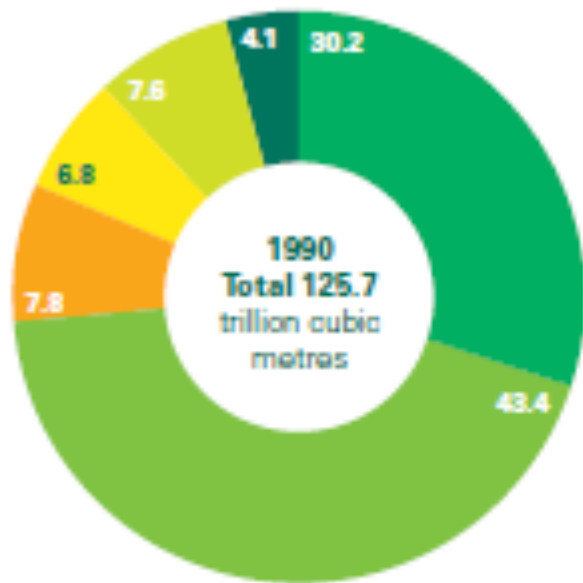
World Population



Distribution of proved reserves in 1990, 2000 and 2010

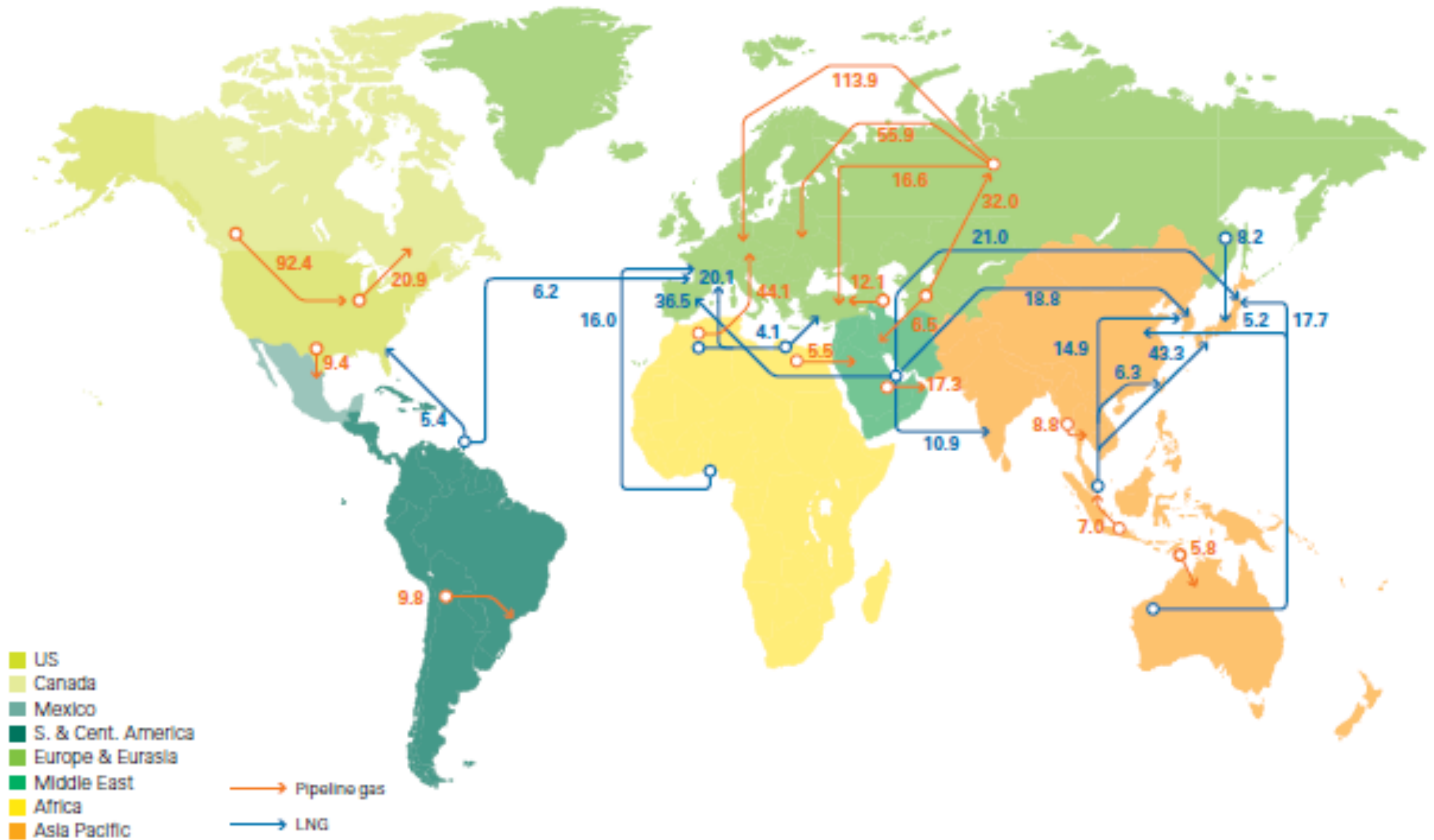
Percentage

- Middle East
- Europe & Eurasia
- Asia Pacific
- Africa
- North America
- S. & Cent. America



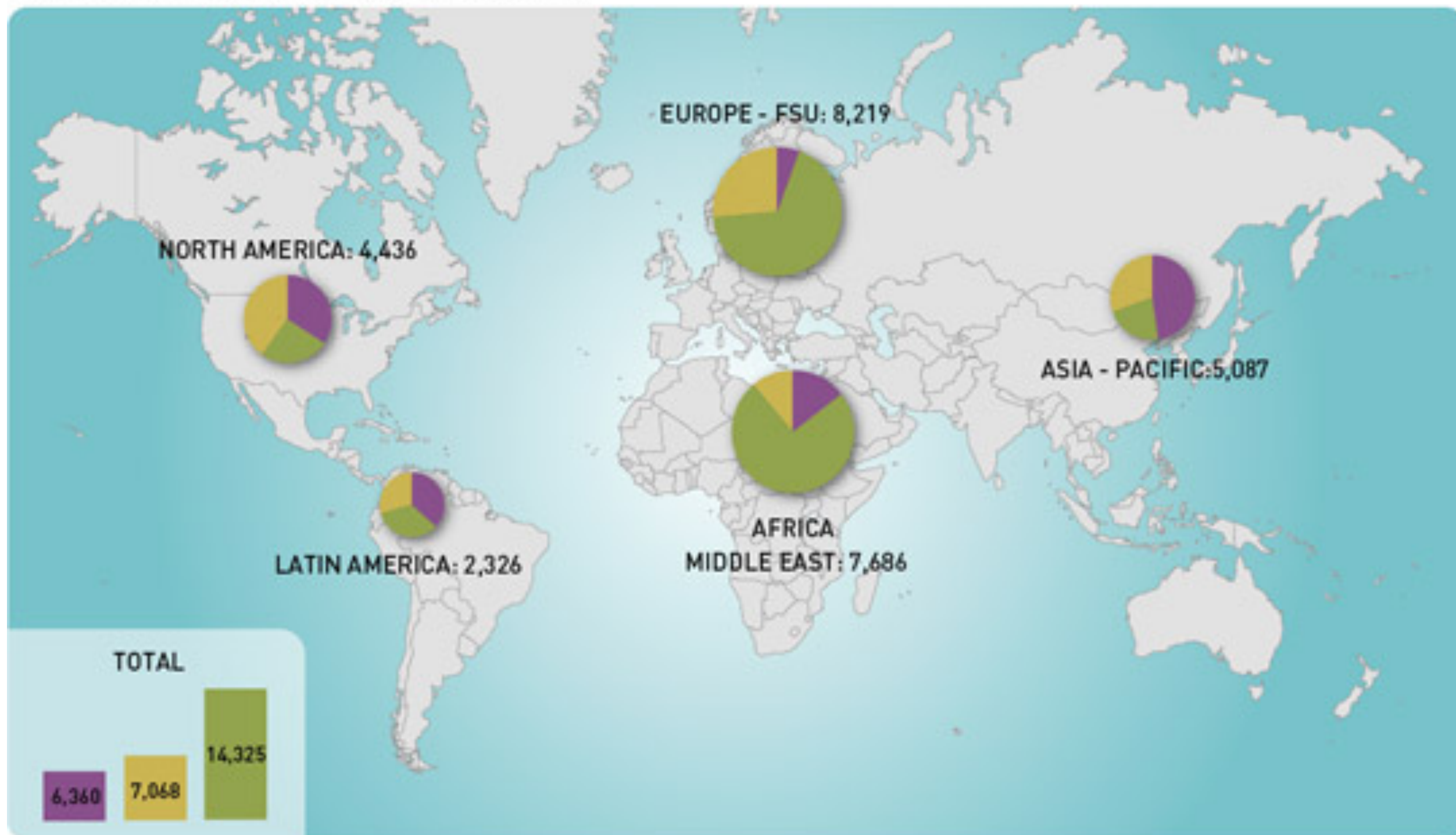
Major trade movements

Trade flows worldwide (billion cubic metres)



WORLD GAS RESOURCES BY GAS TYPE

Recoverable resources, Tcf (Tera cubic feet)

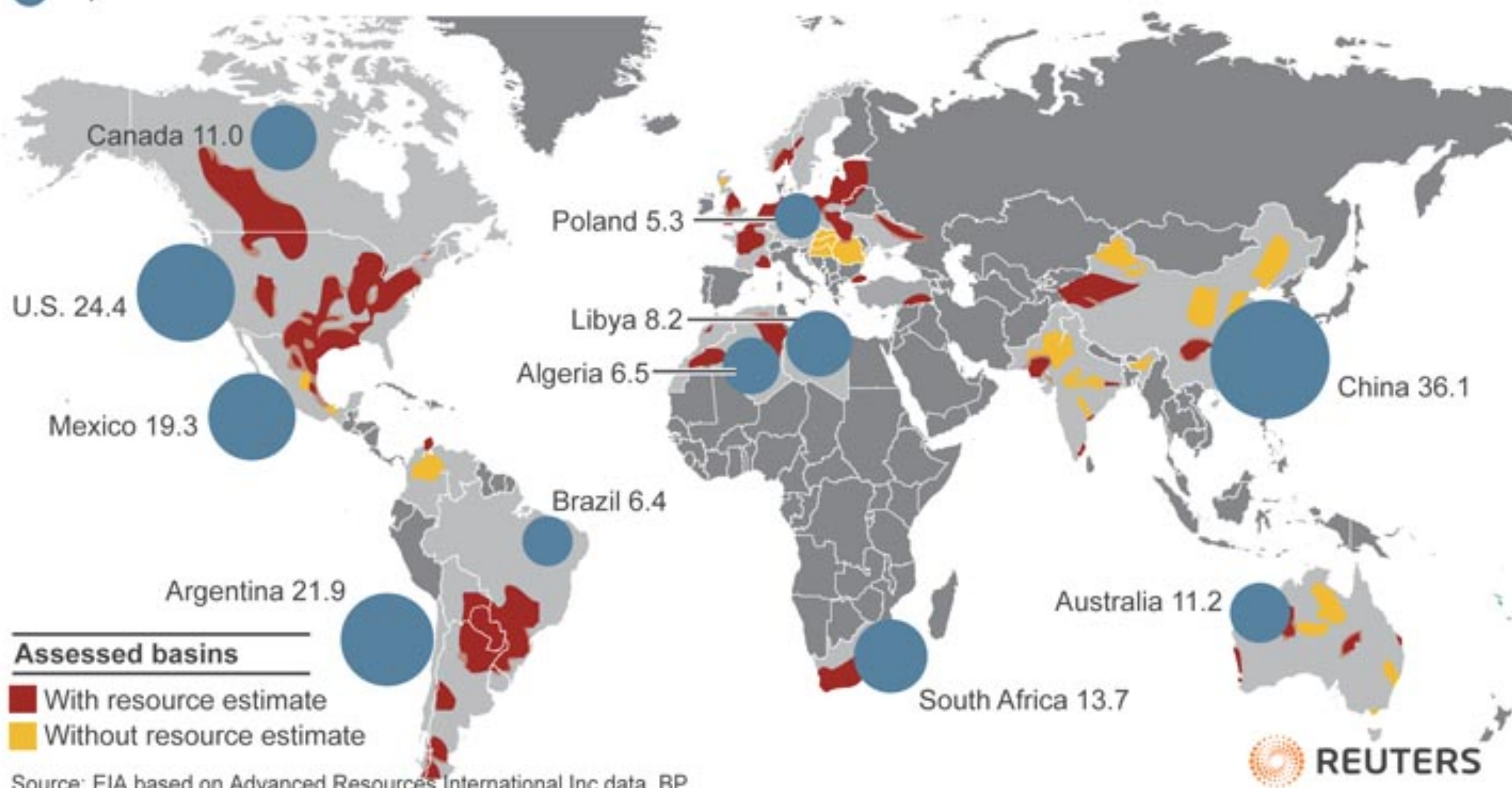


- Shale gas
- Others unconventional gas
- Conventional gas

Source: World Energy Outlook 2009

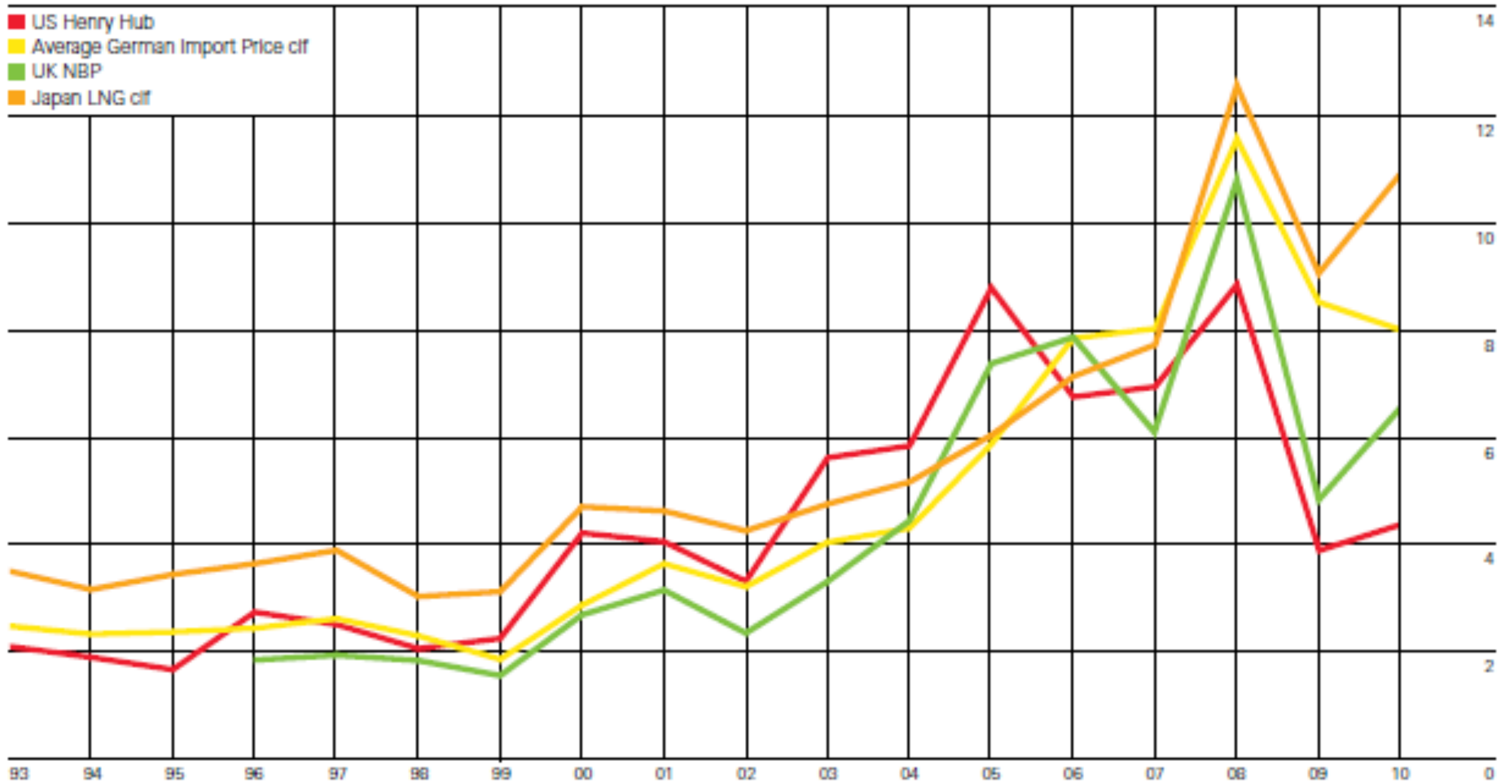
Global shale gas basins, top reserve holders

● Top reserve holders 200 - Trln cubic metres

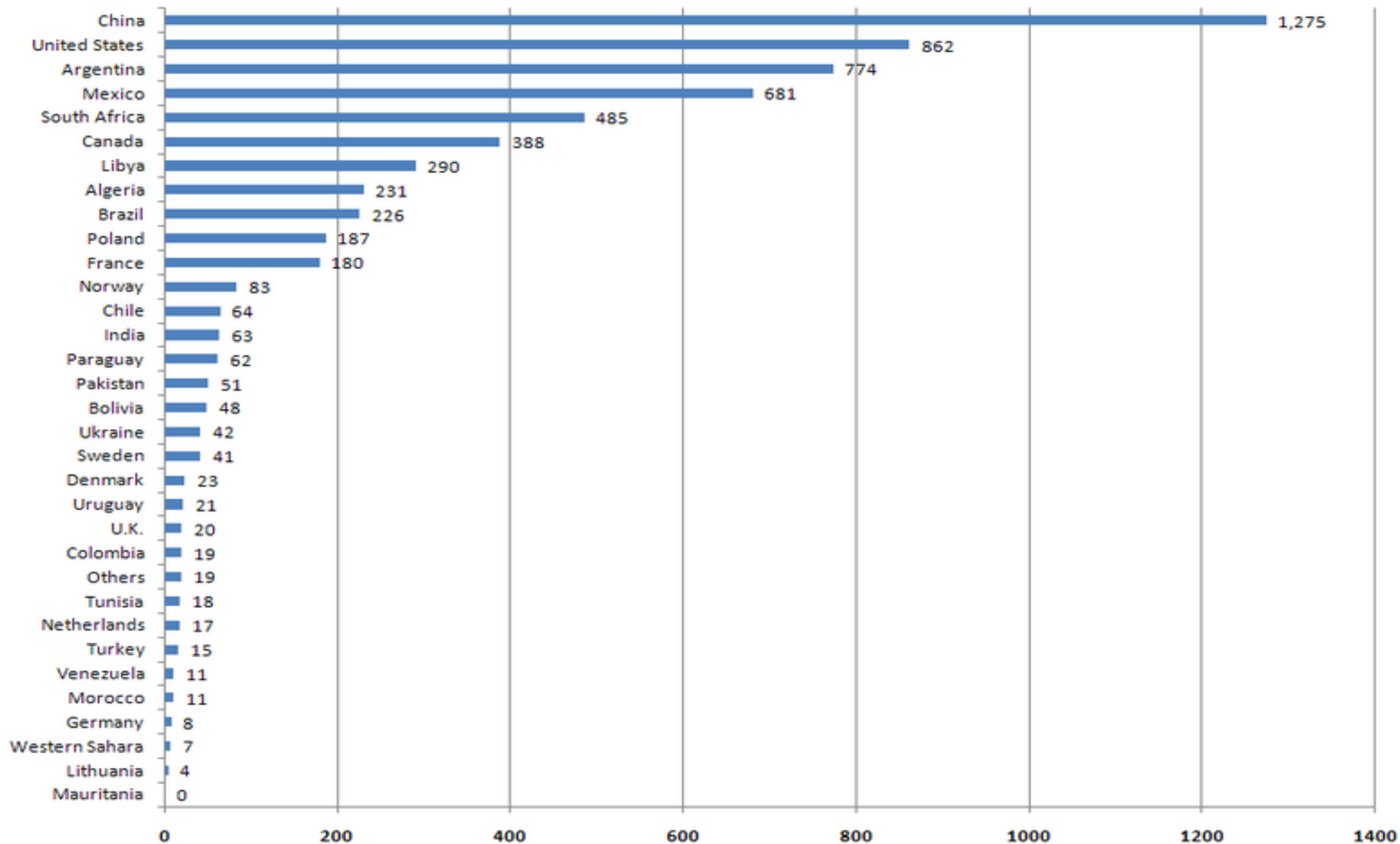


Prices

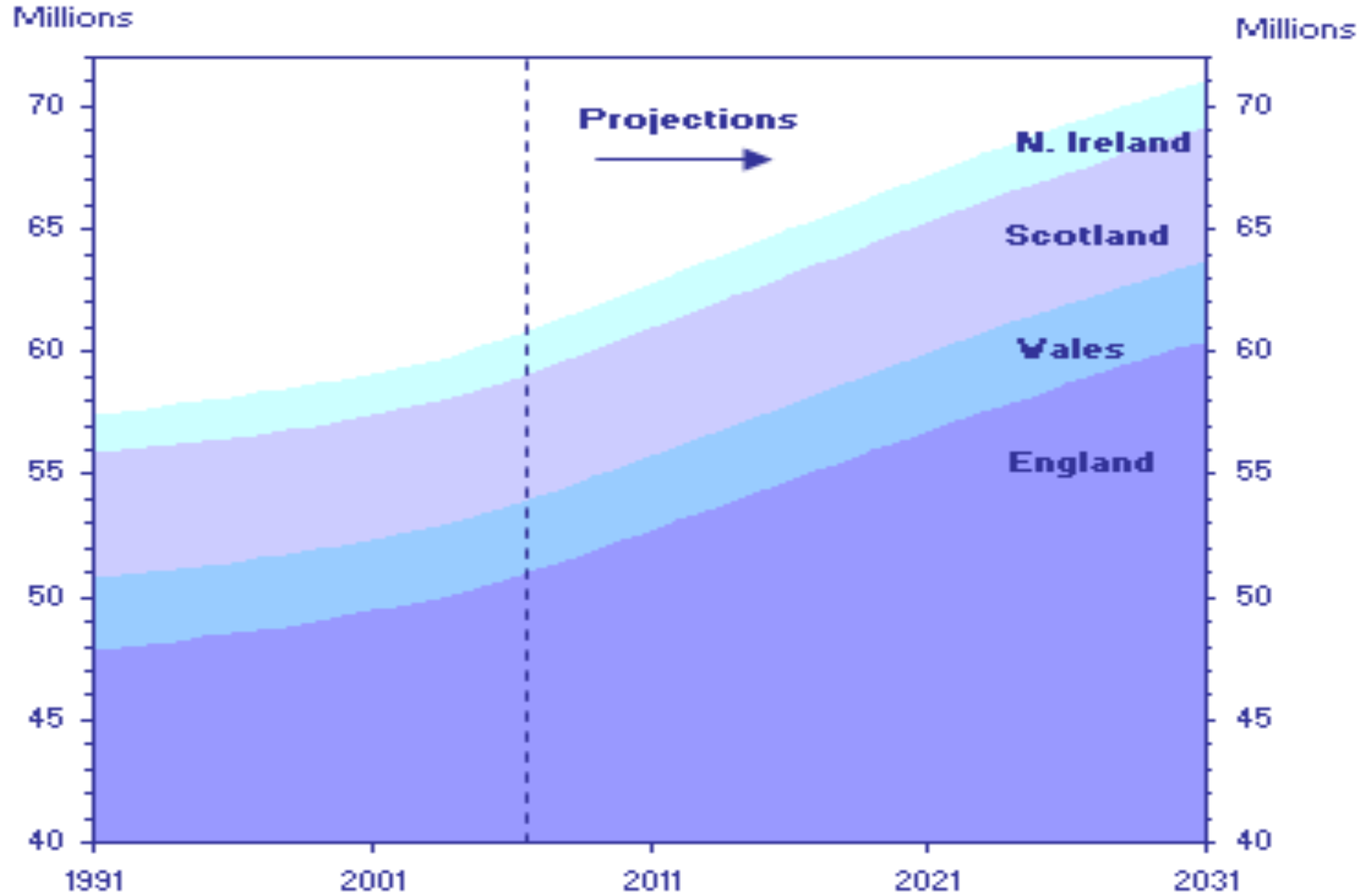
\$/Mmbtu



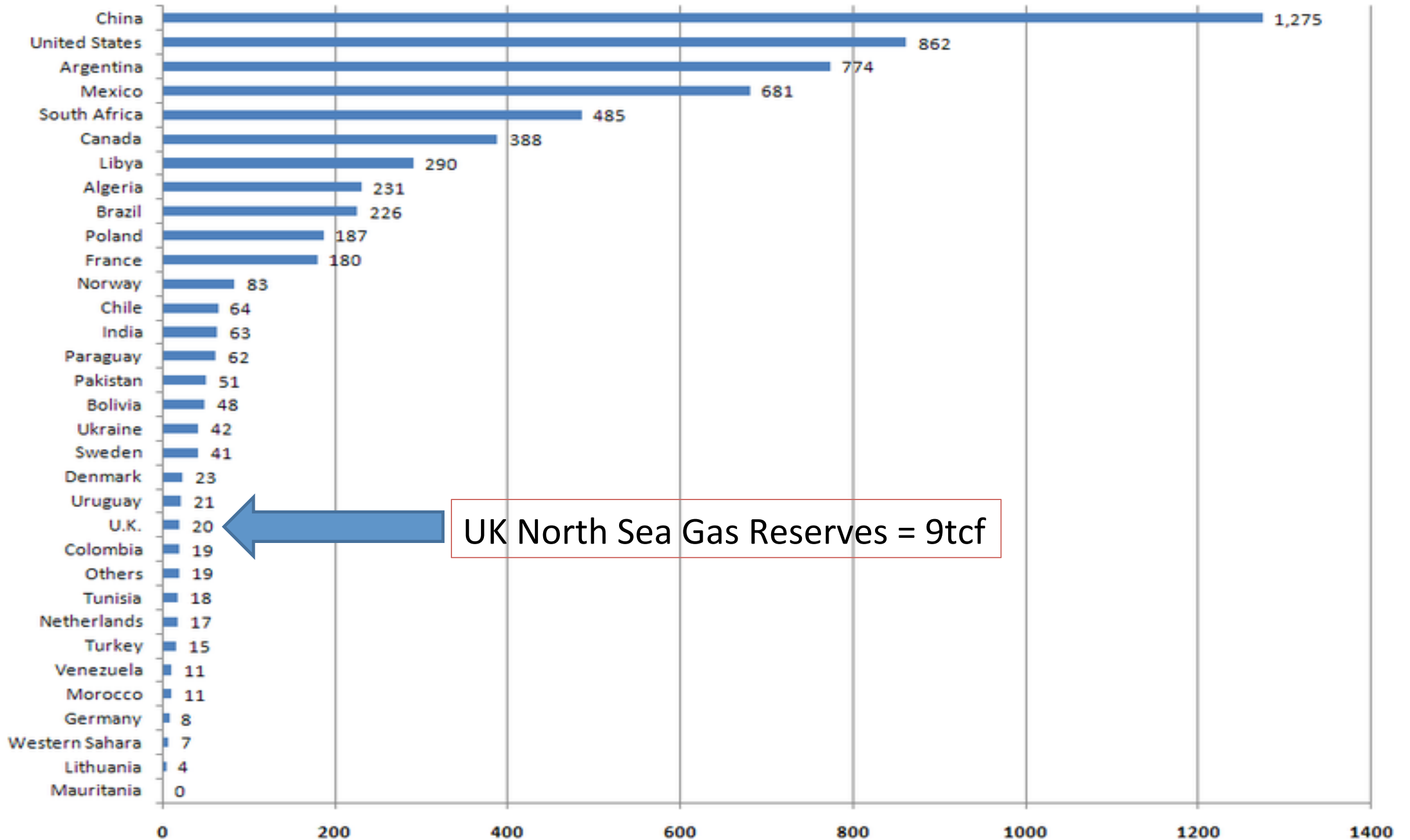
Estimated global shale gas technically recoverable resources (Tcf)



UK Population Growth



Estimated global shale gas technically recoverable resources (Tcf)



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