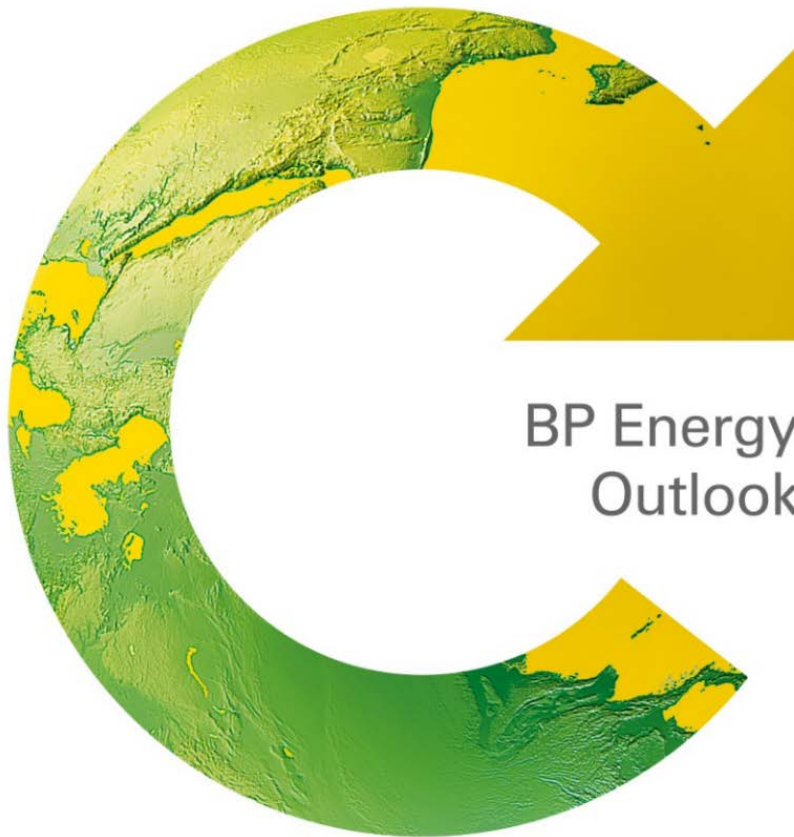


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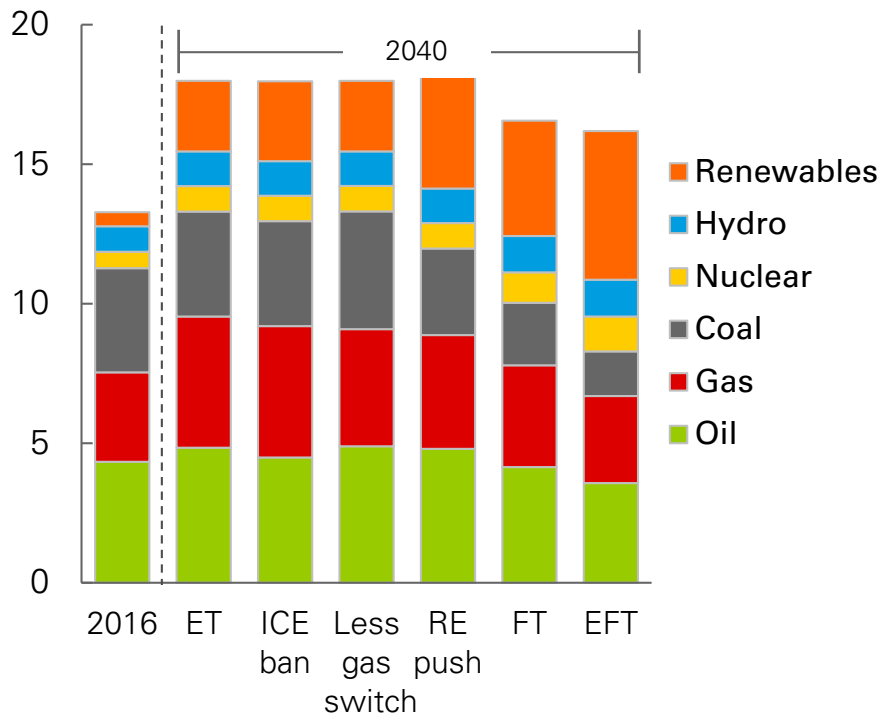
Spencer Dale
Group chief economist

Alternative scenarios



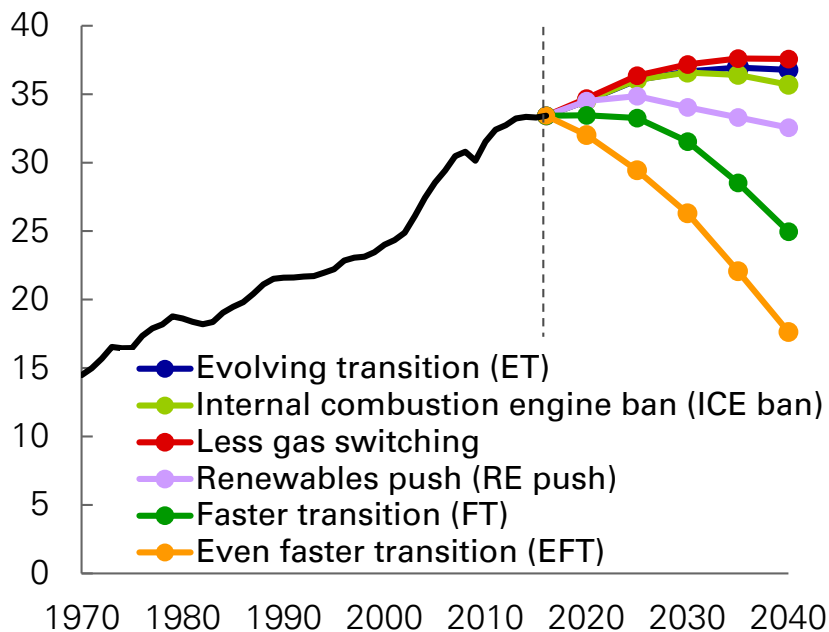
Primary energy consumption by fuel

Billion toe



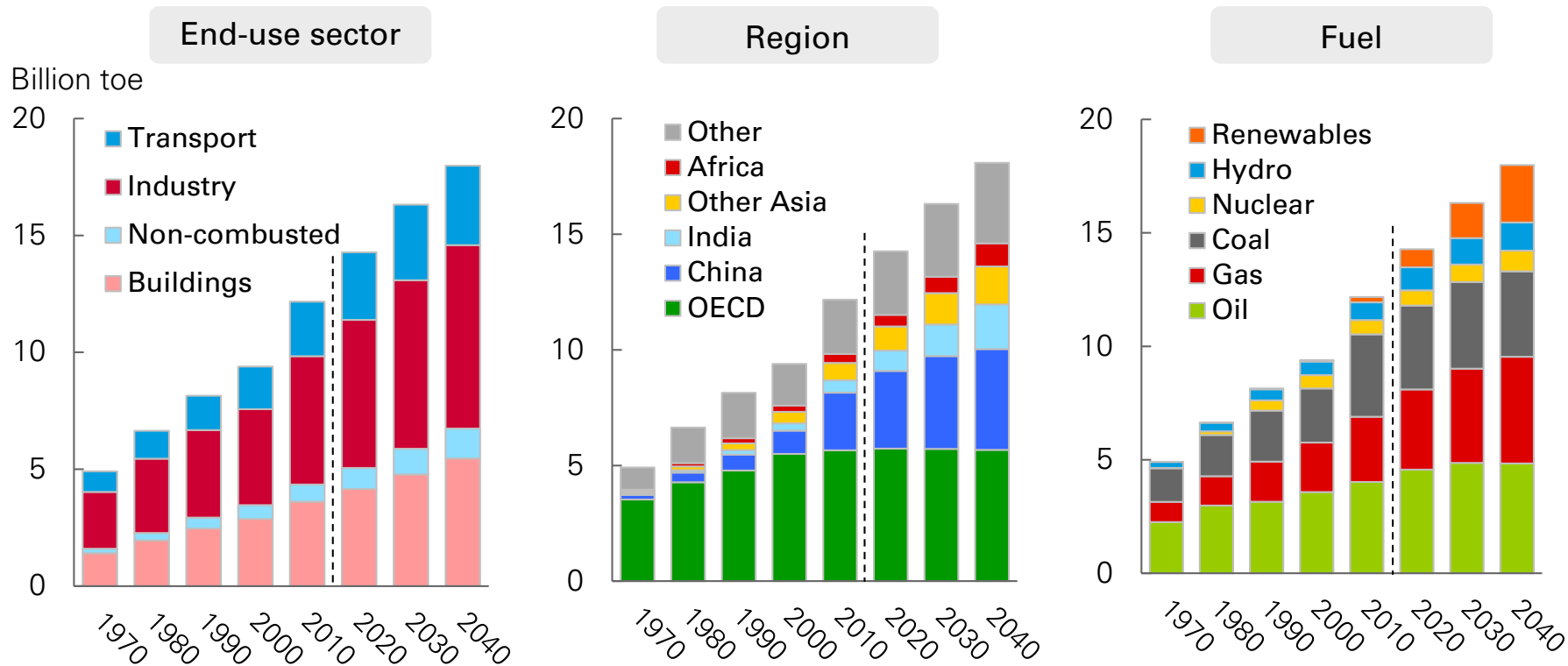
Carbon emissions

Billion tonnes CO₂



Three windows on the energy transition

Primary energy demand

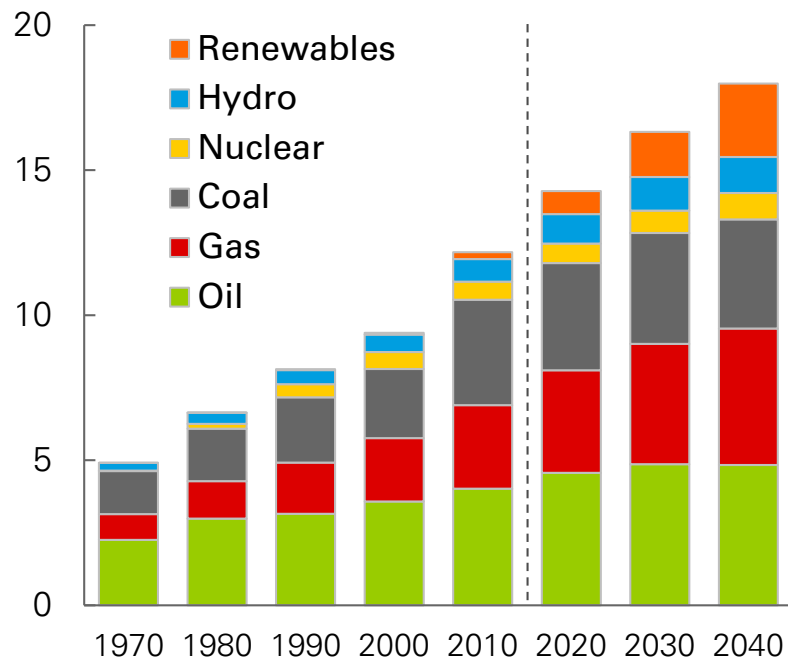


Global energy by fuel

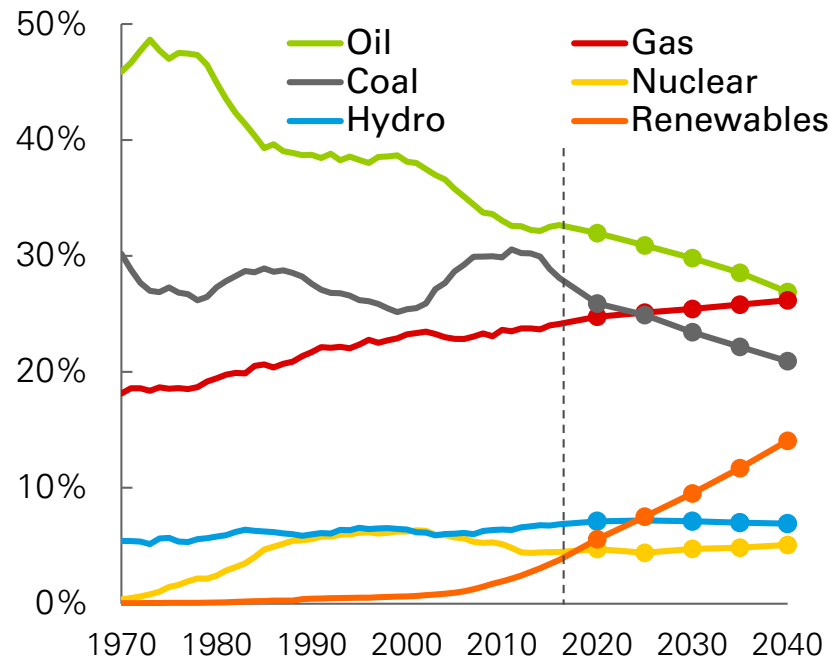


Primary energy consumption by fuel

Billion toe



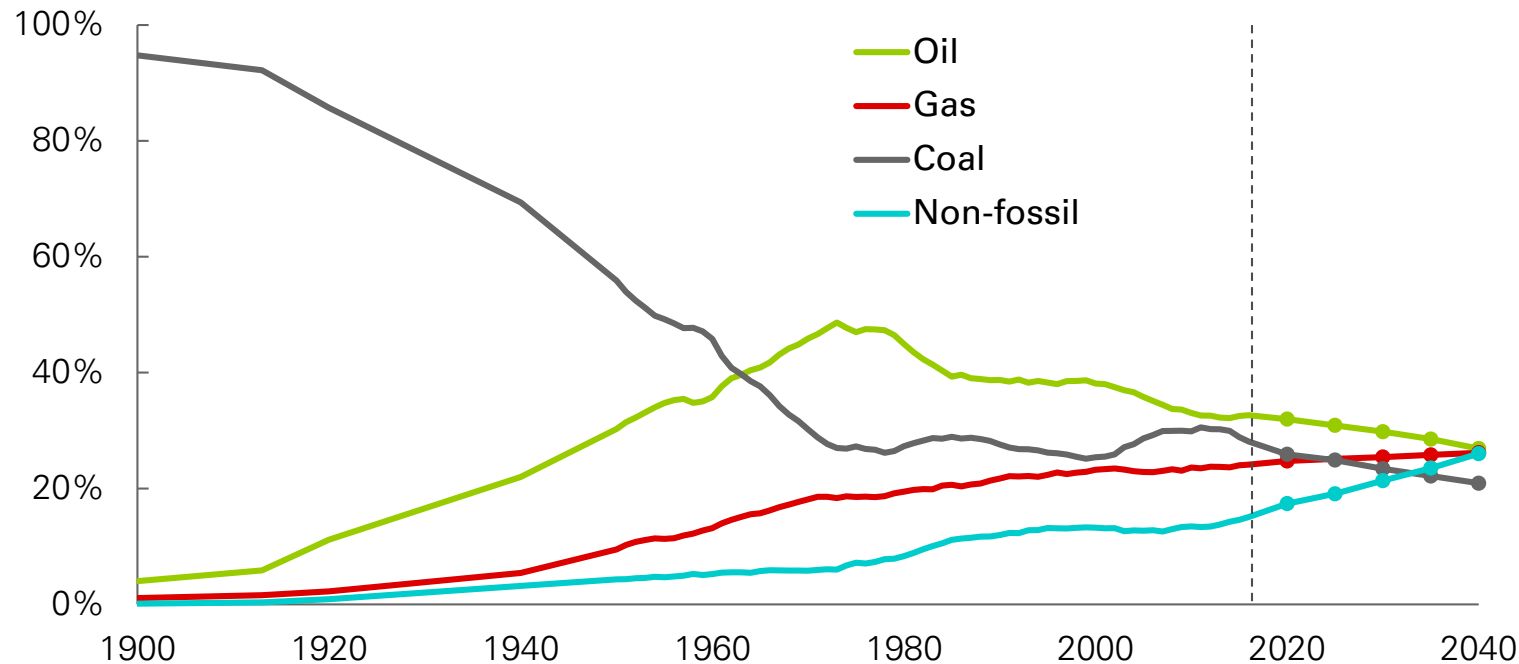
Shares of primary energy



Diversified fuel mix



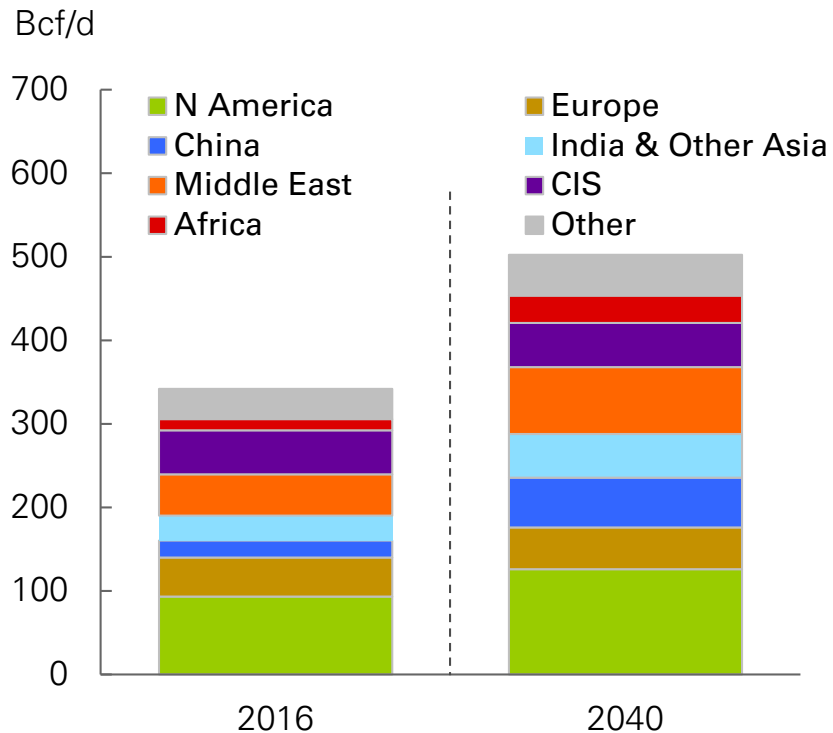
Shares of primary energy



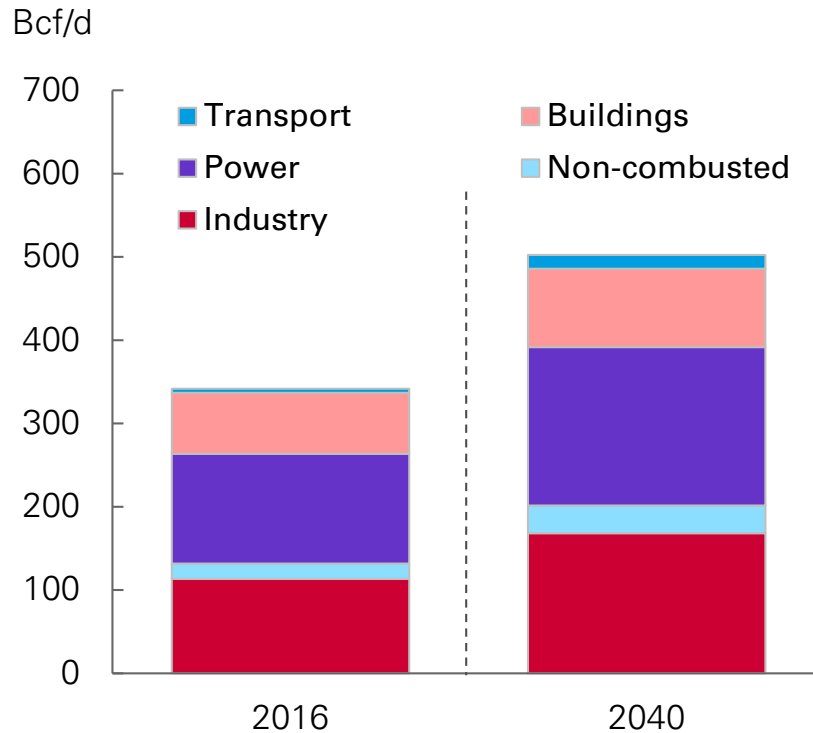
Natural gas

Growth in natural gas demand

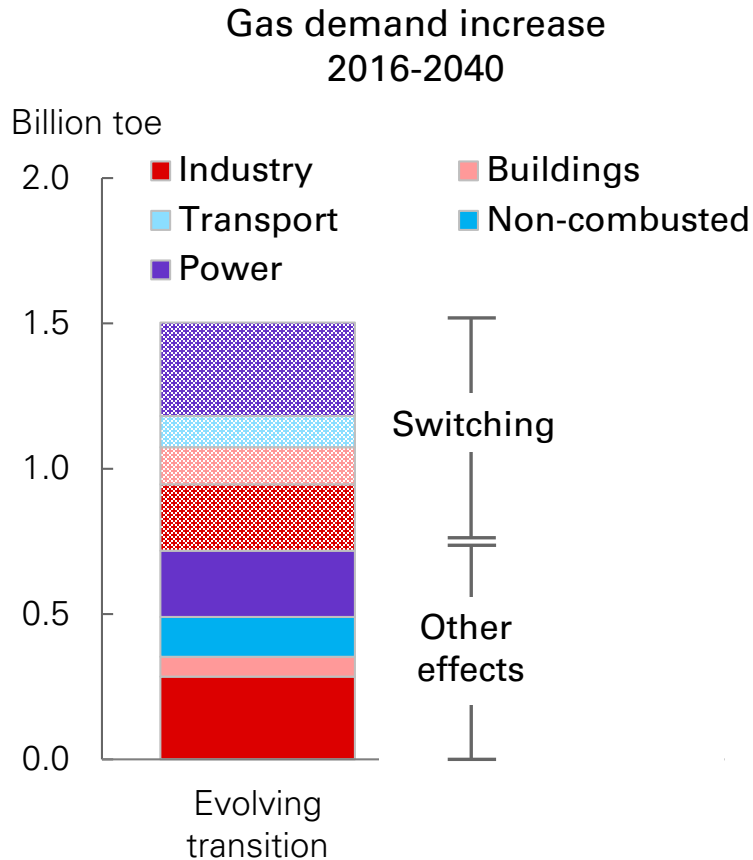
Gas consumption by region



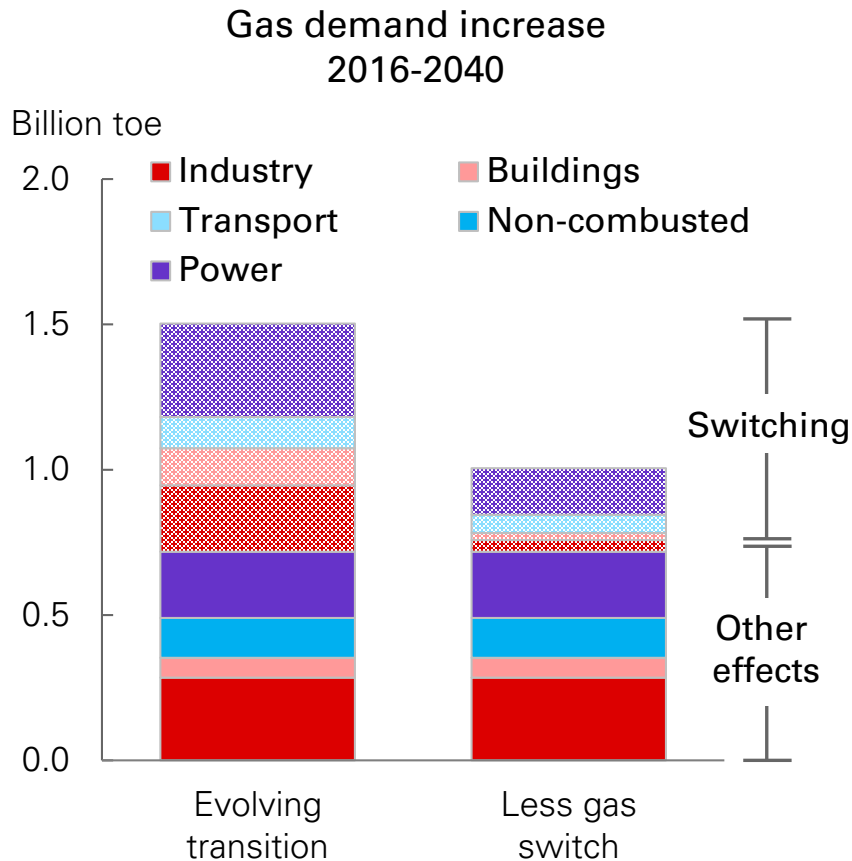
Gas consumption by sector



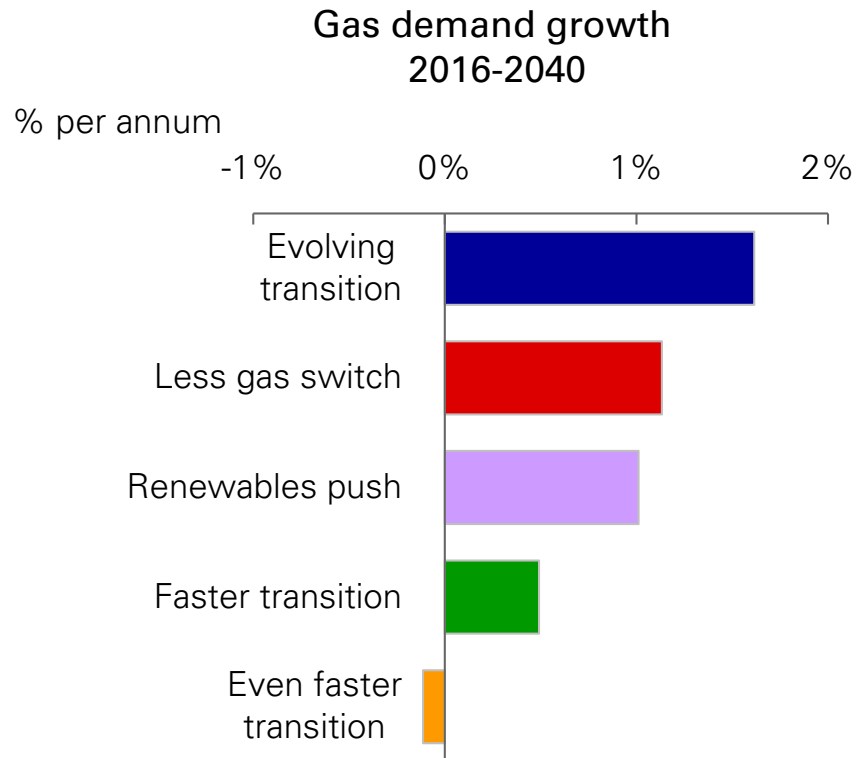
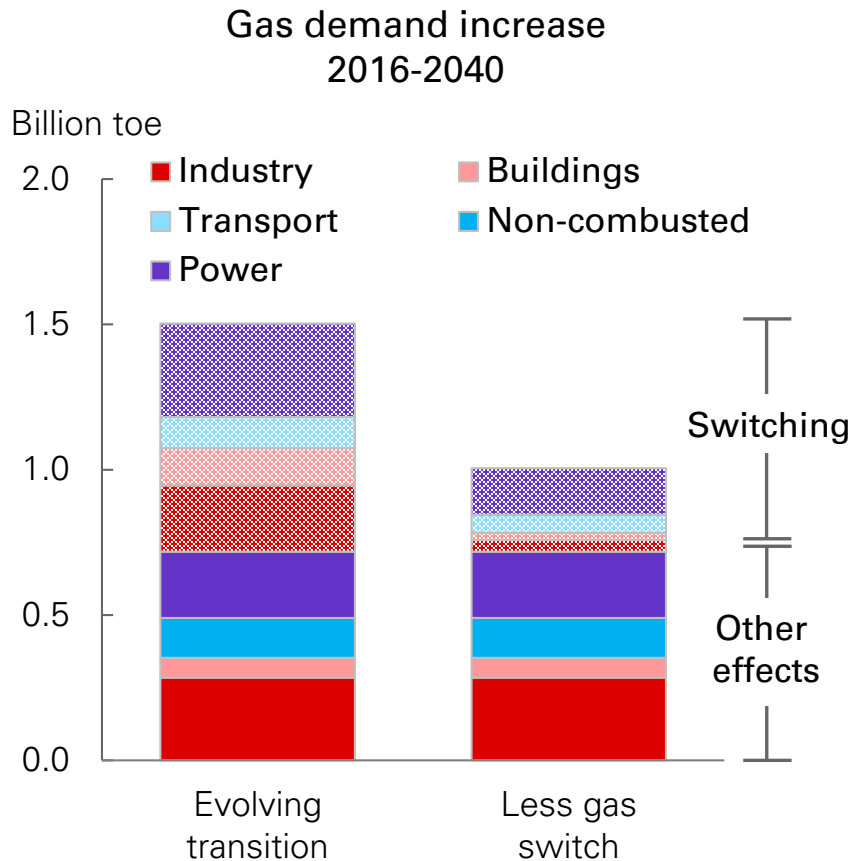
Possible risks to the outlook for natural gas



Possible risks to the outlook for natural gas

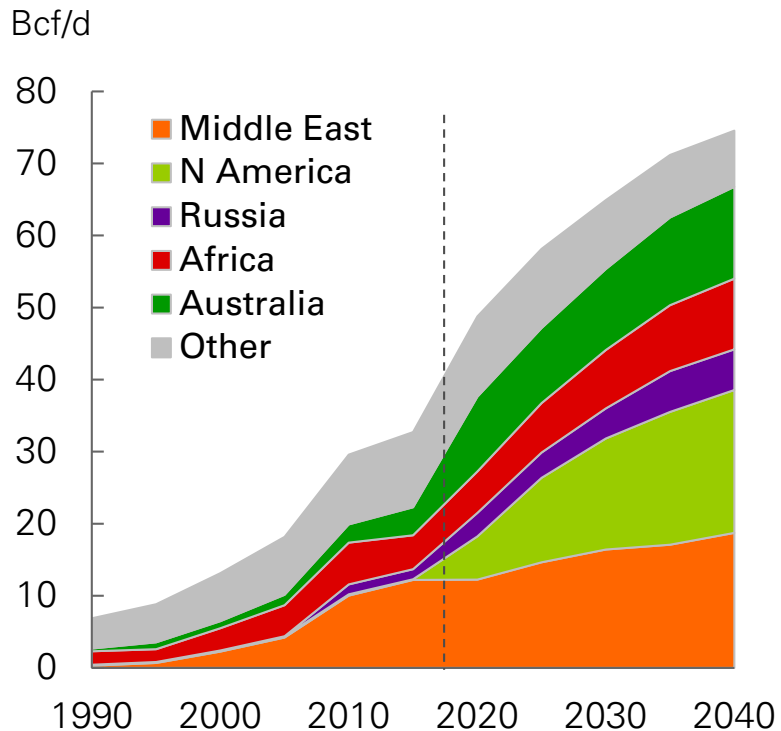


Possible risks to the outlook for natural gas

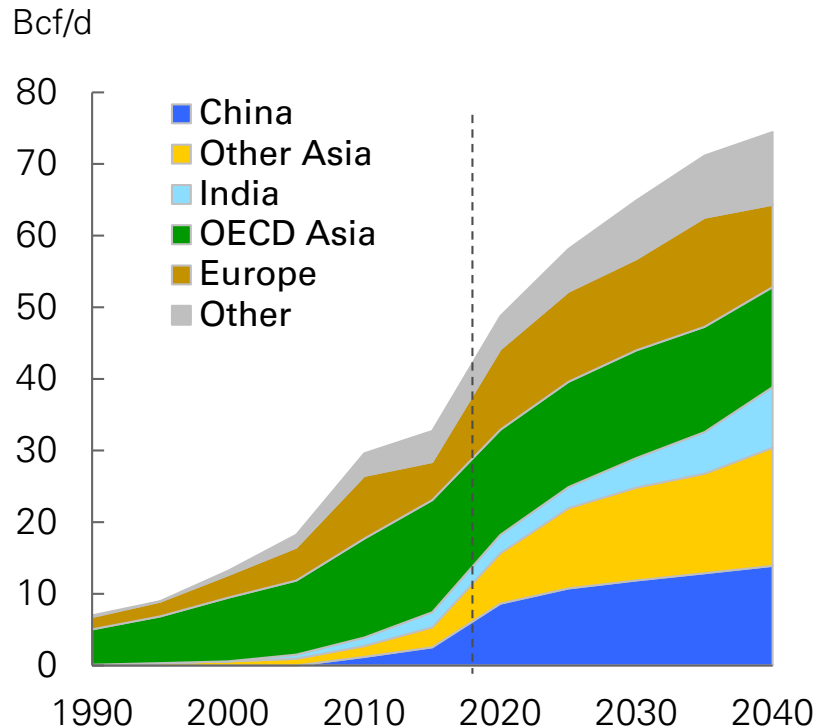


LNG continues to grow

LNG exports

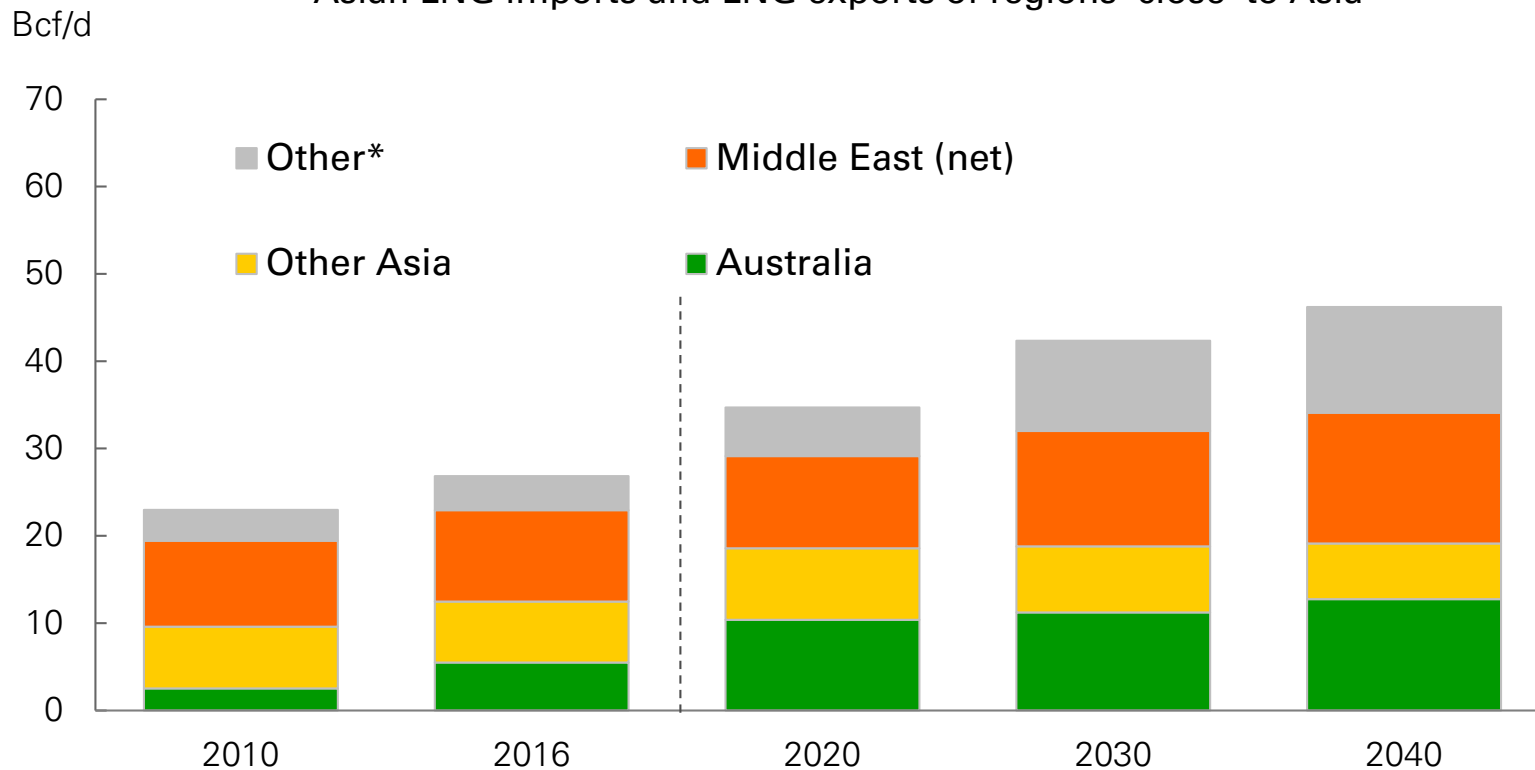


LNG imports



Asian demand for US LNG

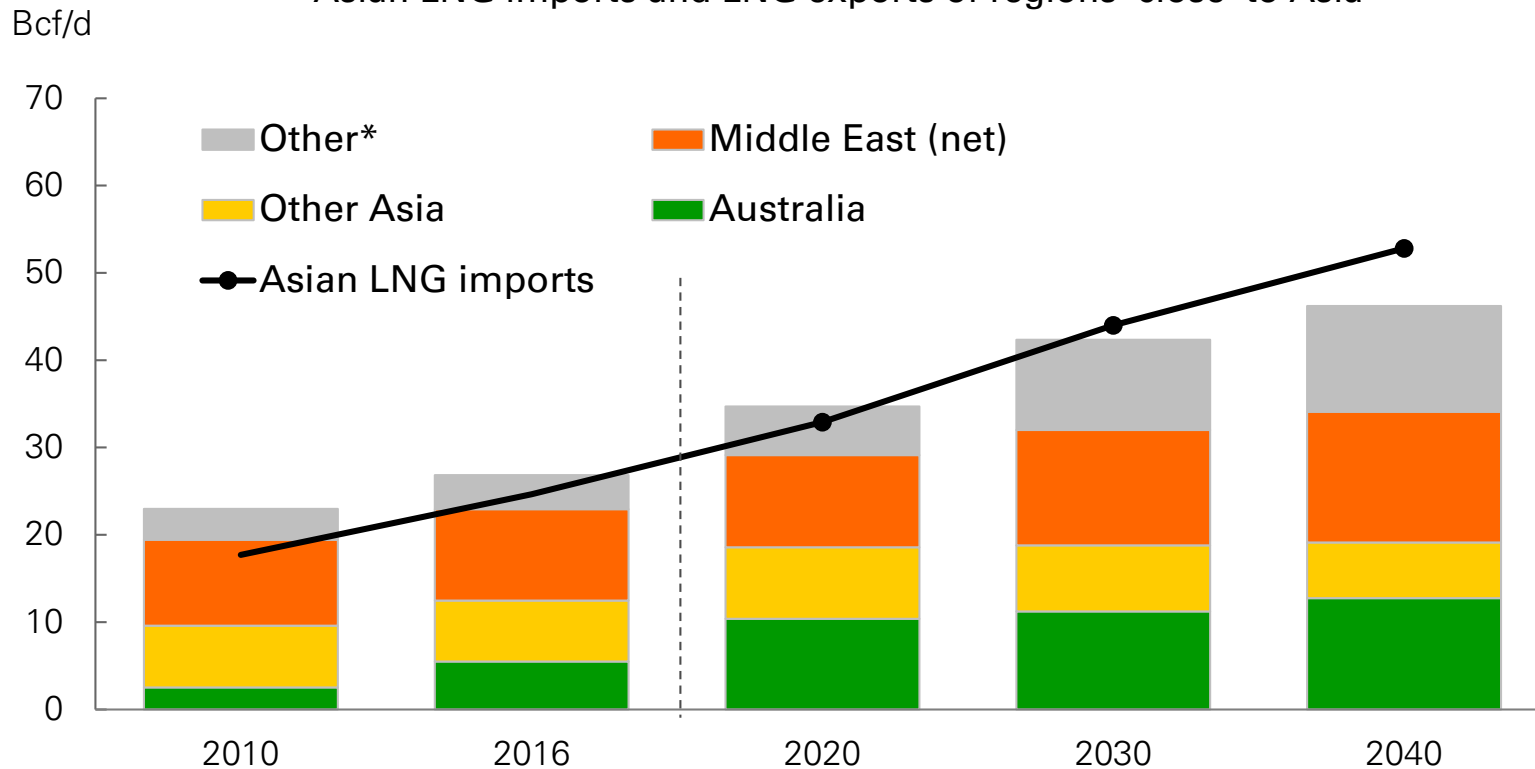
Asian LNG imports and LNG exports of regions 'close' to Asia



*Other includes Peru, Canada, East Africa, Angola, parts of West African and Russian gas supplies

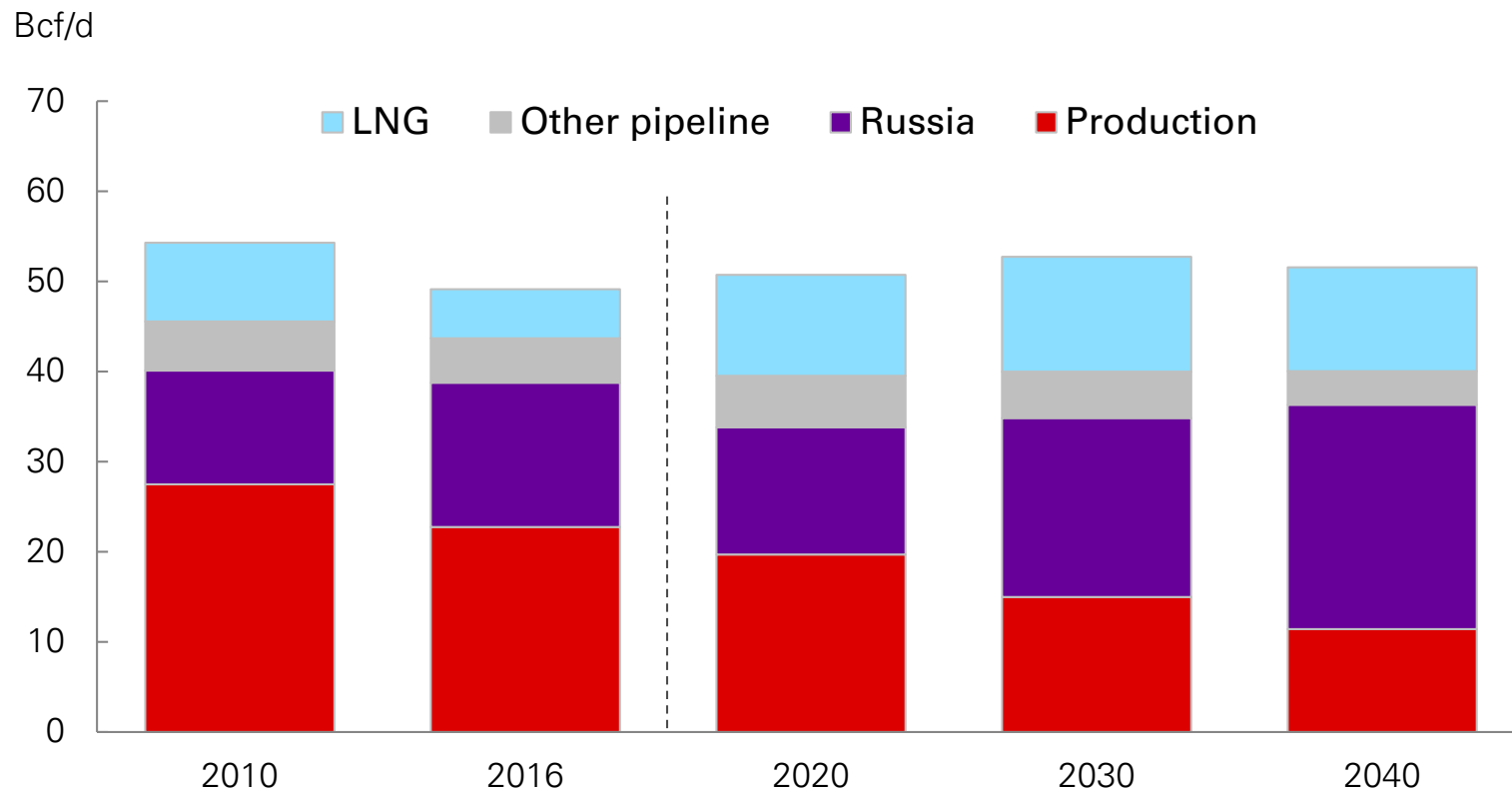
Asian demand for US LNG

Asian LNG imports and LNG exports of regions 'close' to Asia



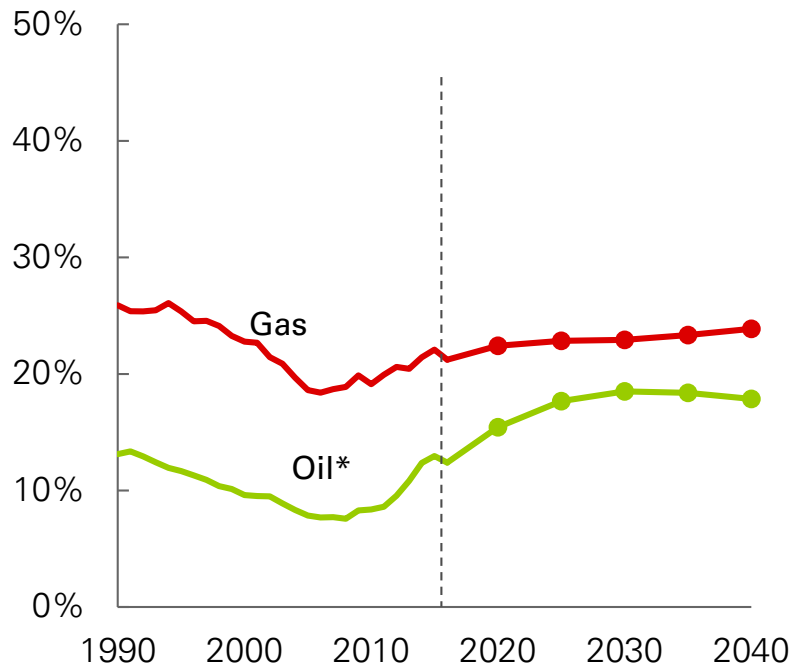
*Other includes Peru, Canada, East Africa, Angola, parts of West African and Russian gas supplies

Gas supply to Europe



The role of US in global energy markets

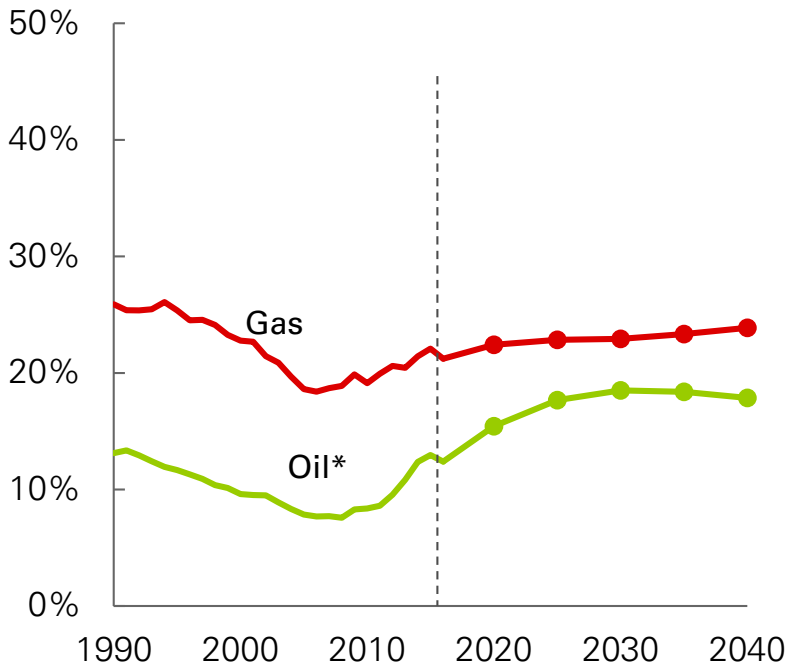
US shares of global production



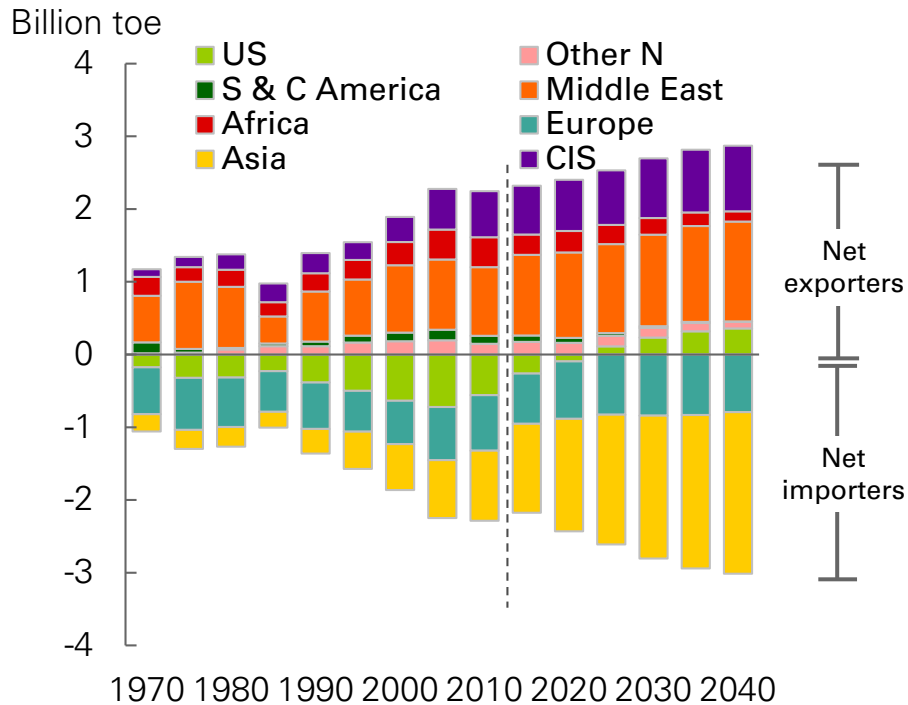
* Includes crude and NGLs

The role of US in global energy markets

US shares of global production

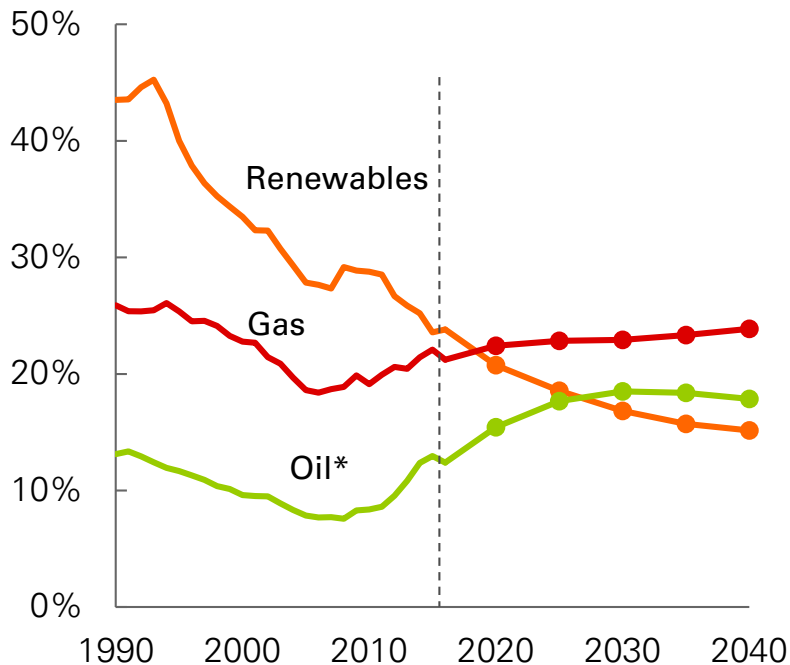


Regional oil/gas imbalances



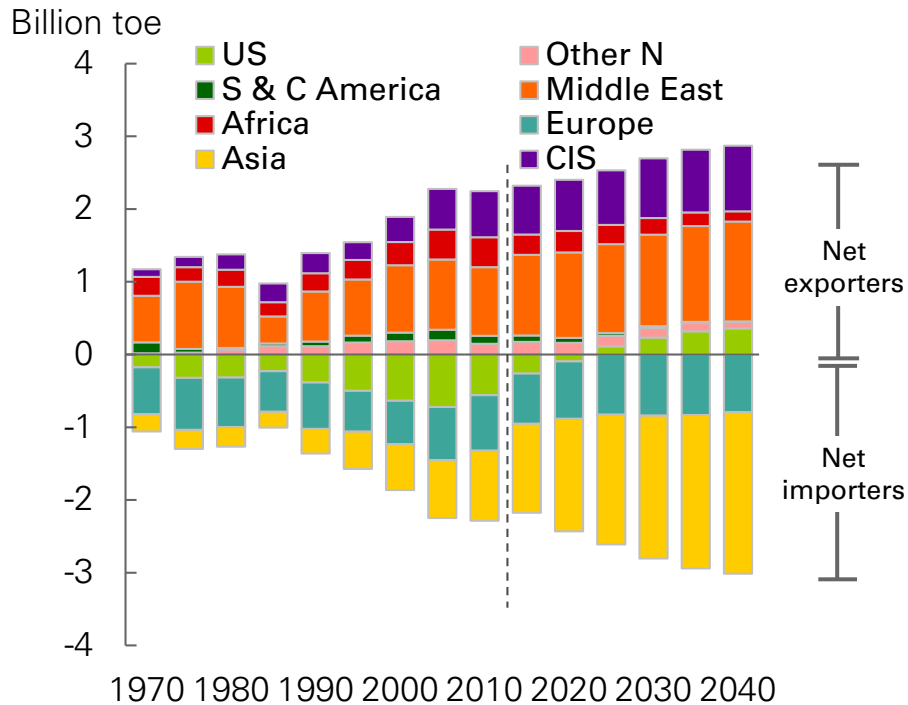
The role of US in global energy markets

US shares of global production



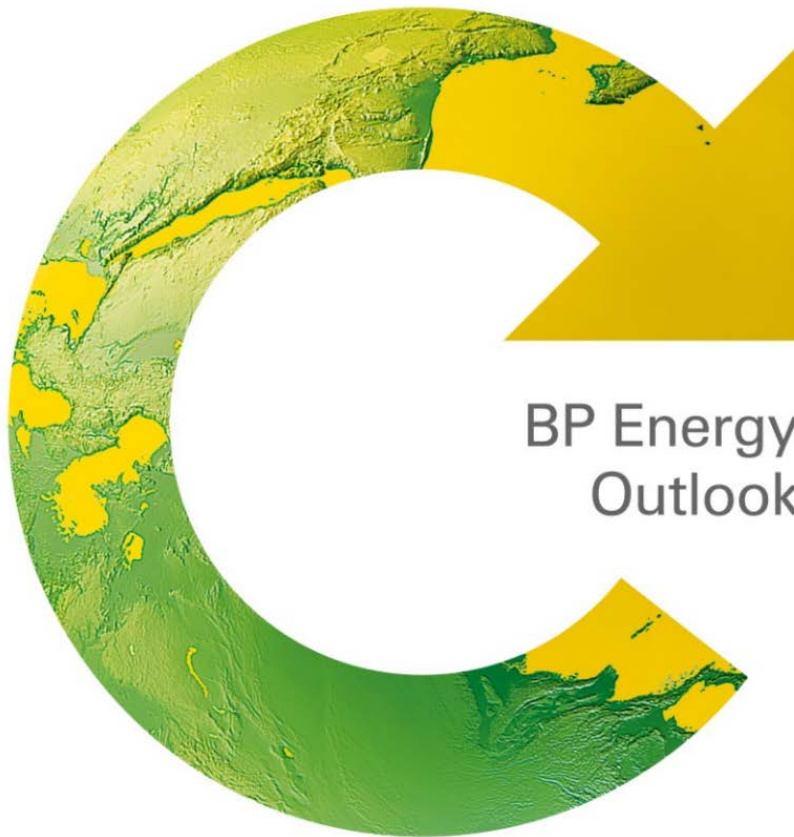
* Includes crude and NGLs

Regional oil/gas imbalances



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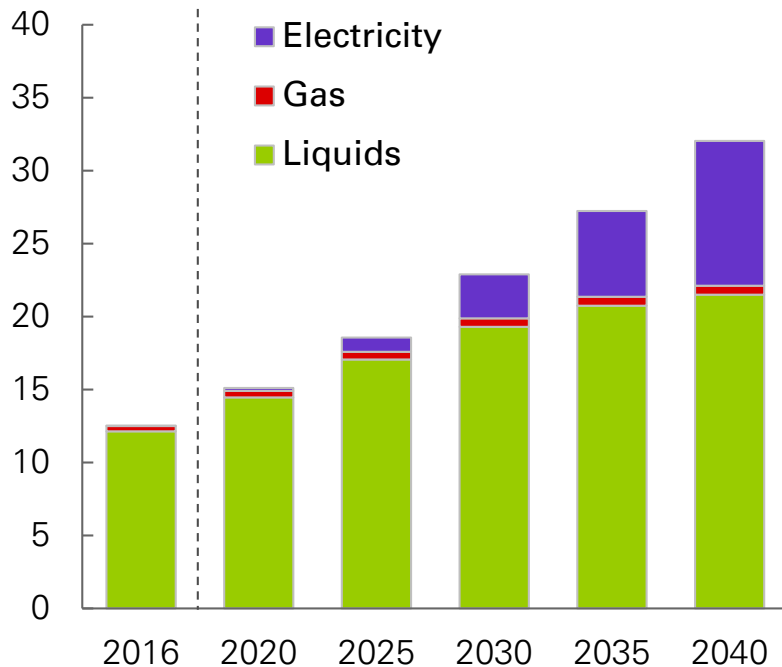
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Spencer Dale
Group chief economist

Electric cars, shared mobility and autonomy

Car kilometres by fuel type

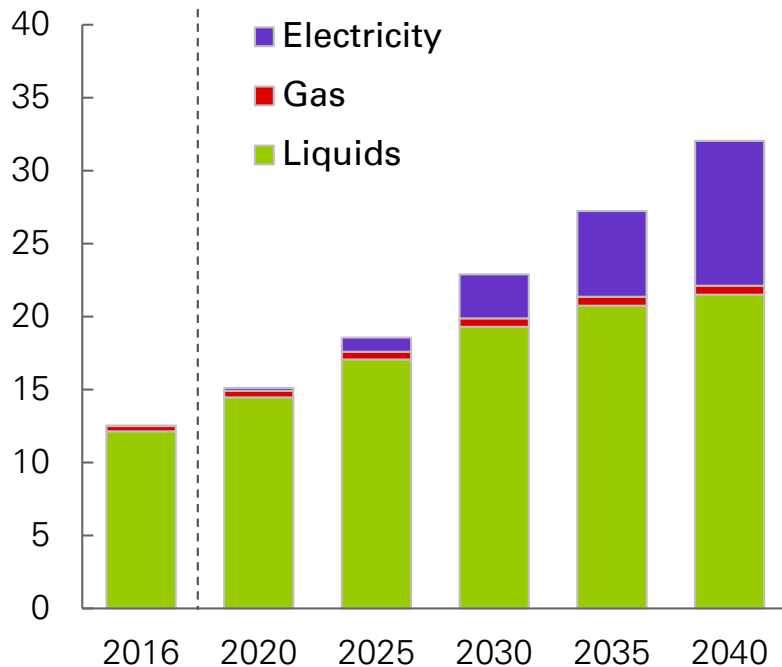
Trillion km



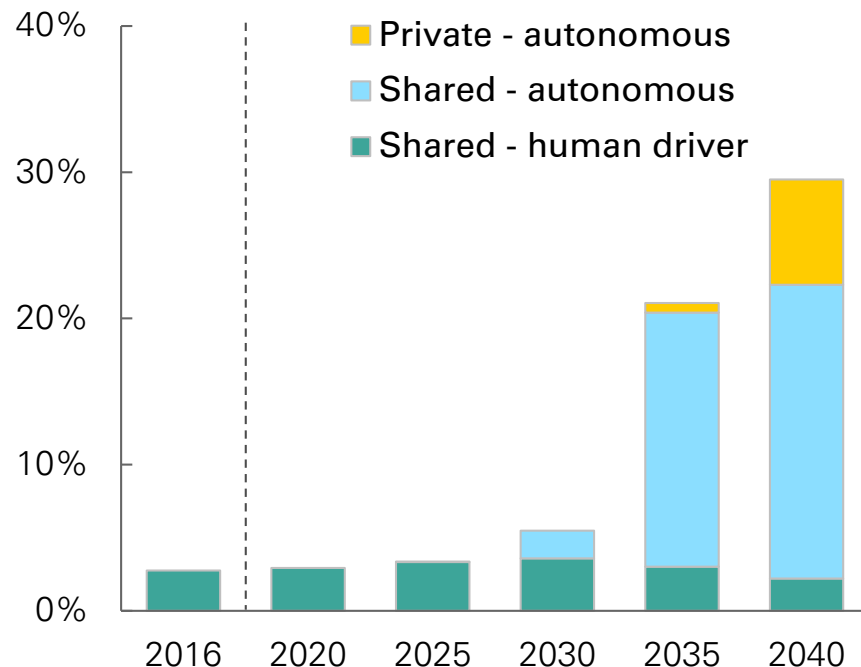
Electric cars, shared mobility and autonomy

Car kilometres by fuel type

Trillion km

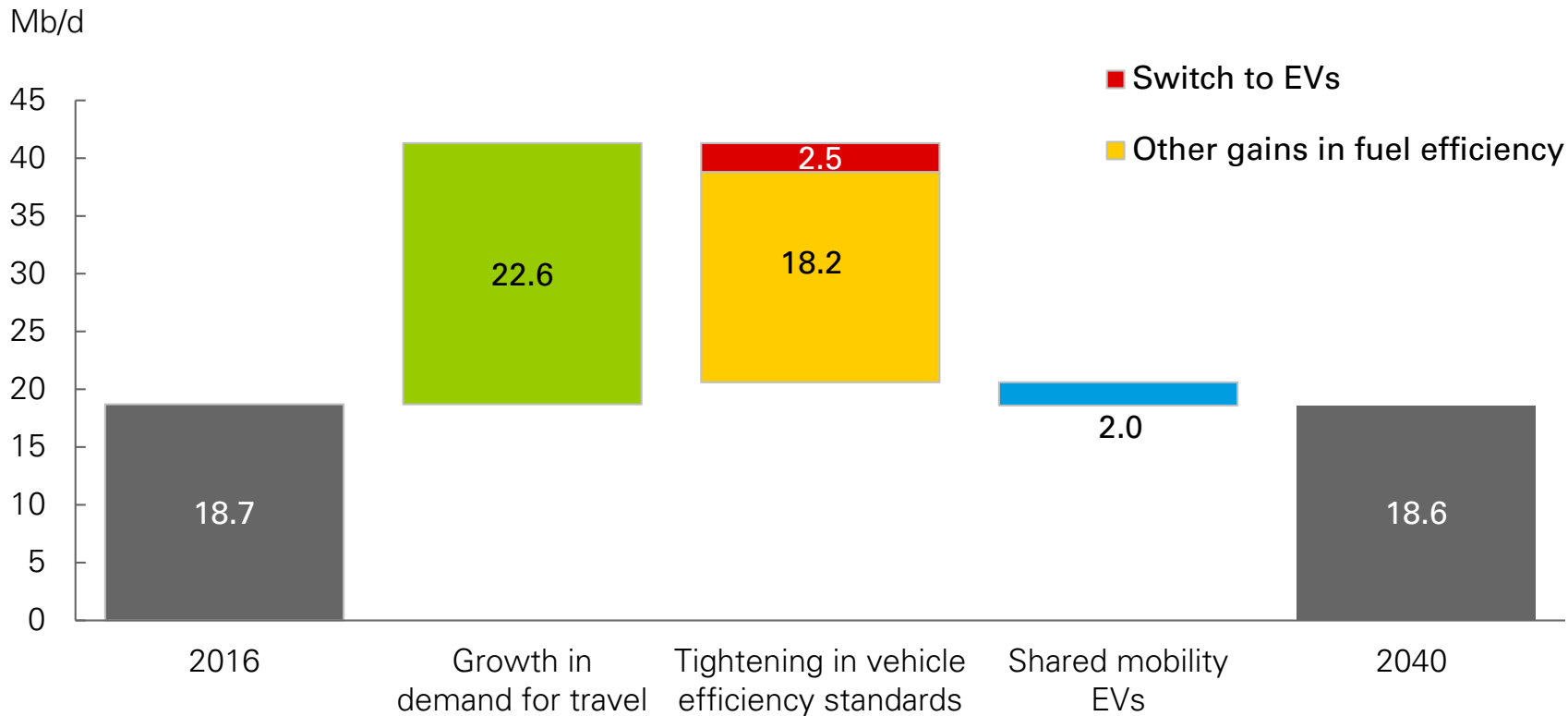


New mobility share of Vkm



Liquid fuel demand from passenger cars

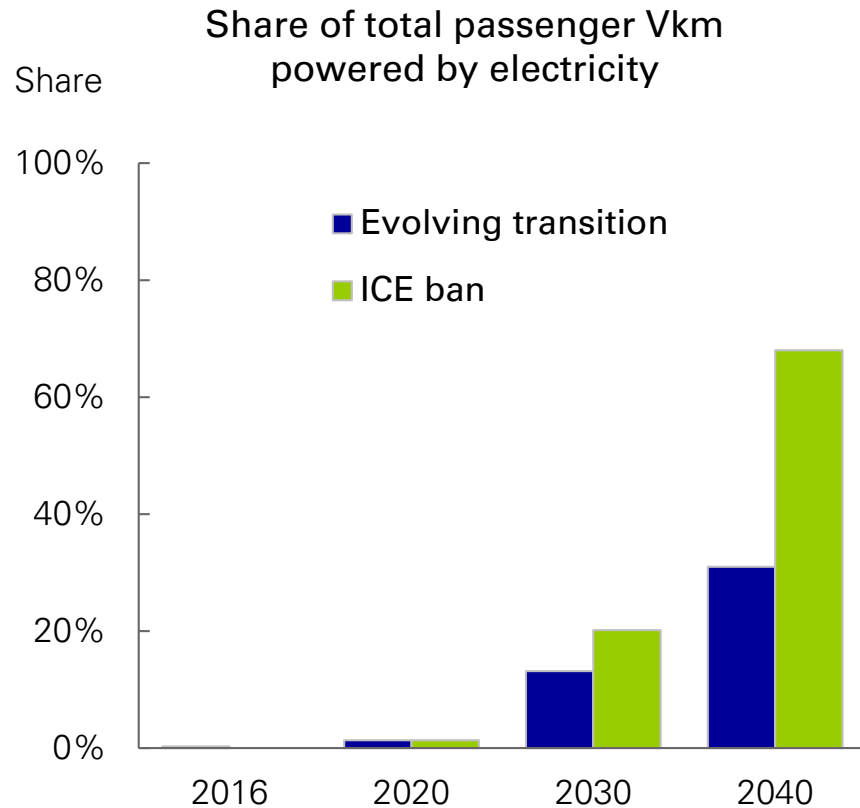
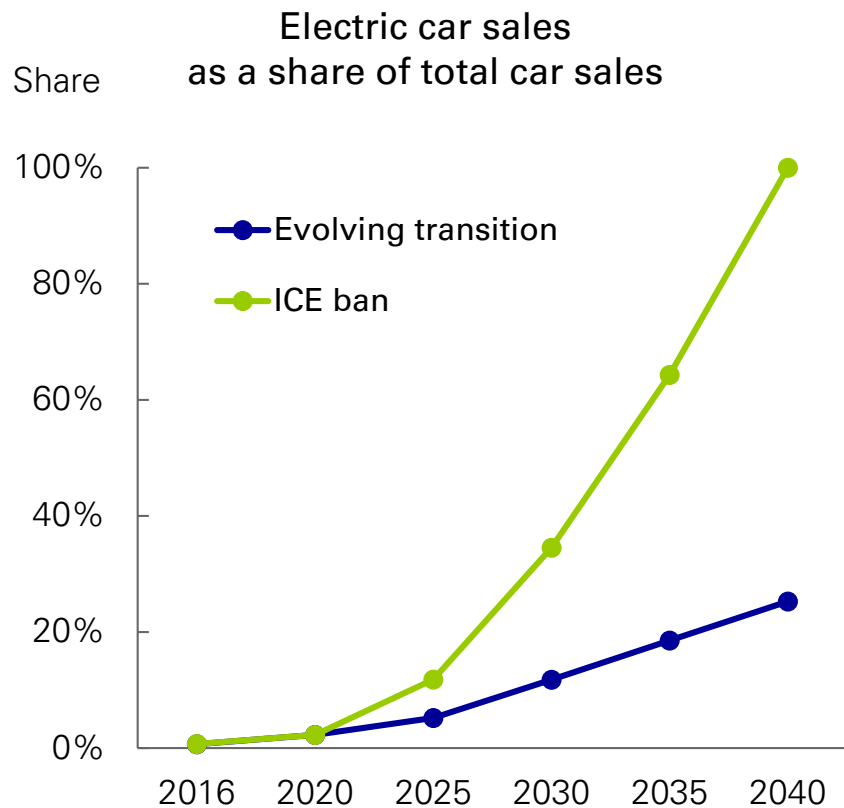
Changes in liquids demand from cars: 2016-2040



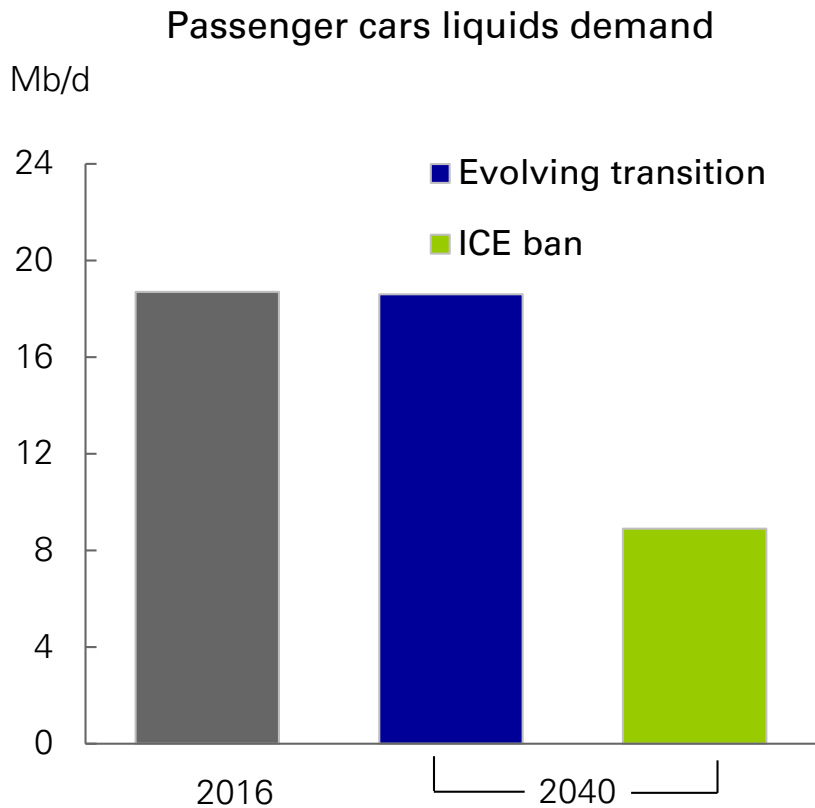
Global ban on internal-combustion engine (ICE) cars



Global ban on internal-combustion engine (ICE) cars

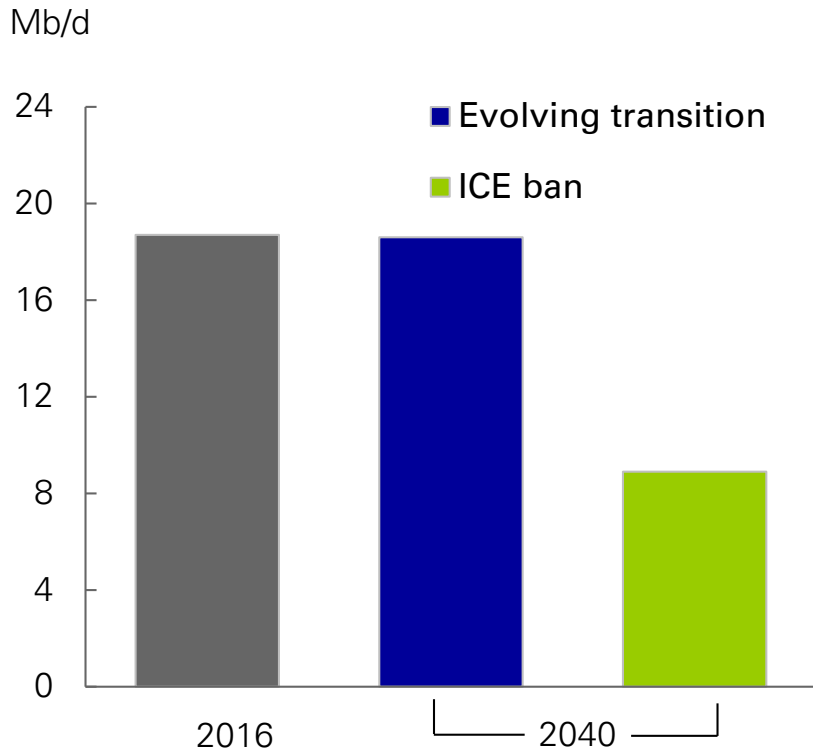


Impact of ICE ban



Impact of ICE ban

Passenger cars liquids demand



Carbon emissions from energy

