



The future market realities

The Coming Energy Markets
IV Global Energy Meeting

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THE BOSTON CONSULTING GROUP

Today's energy dynamics will shape future market realities

1

Availability

- What is the role of the US in the oil markets being oversupplied and what are the likely consequences of the oil price crash in the mid-term?
- How will efficiency and fuel-switching impact future demand of oil and gas?

2

Security

- How can the current energy market dynamics impact the perception of energy security internationally?
- What are the key security risks which arise as these changes work through?

3

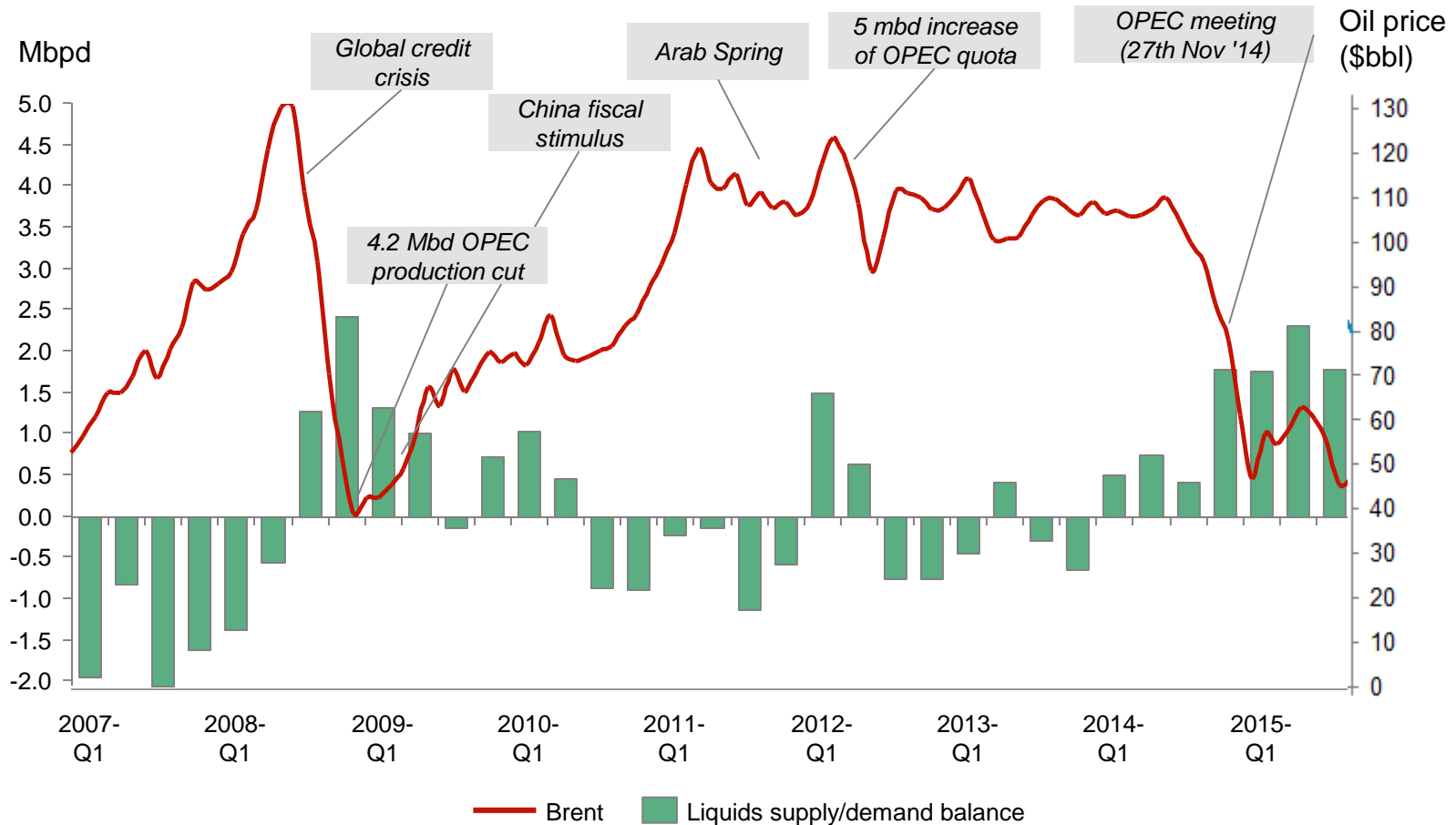
Sustainability

- What is the role of renewables in addressing the sustainability challenge?
- What is the policy reaction to climate change, and how can companies and communities help abate CO₂ emissions?

Oil prices have fallen by ~60% since June 2014

...and more recently by ~30% since mid-May 2015

World liquid fuel production and consumption balance

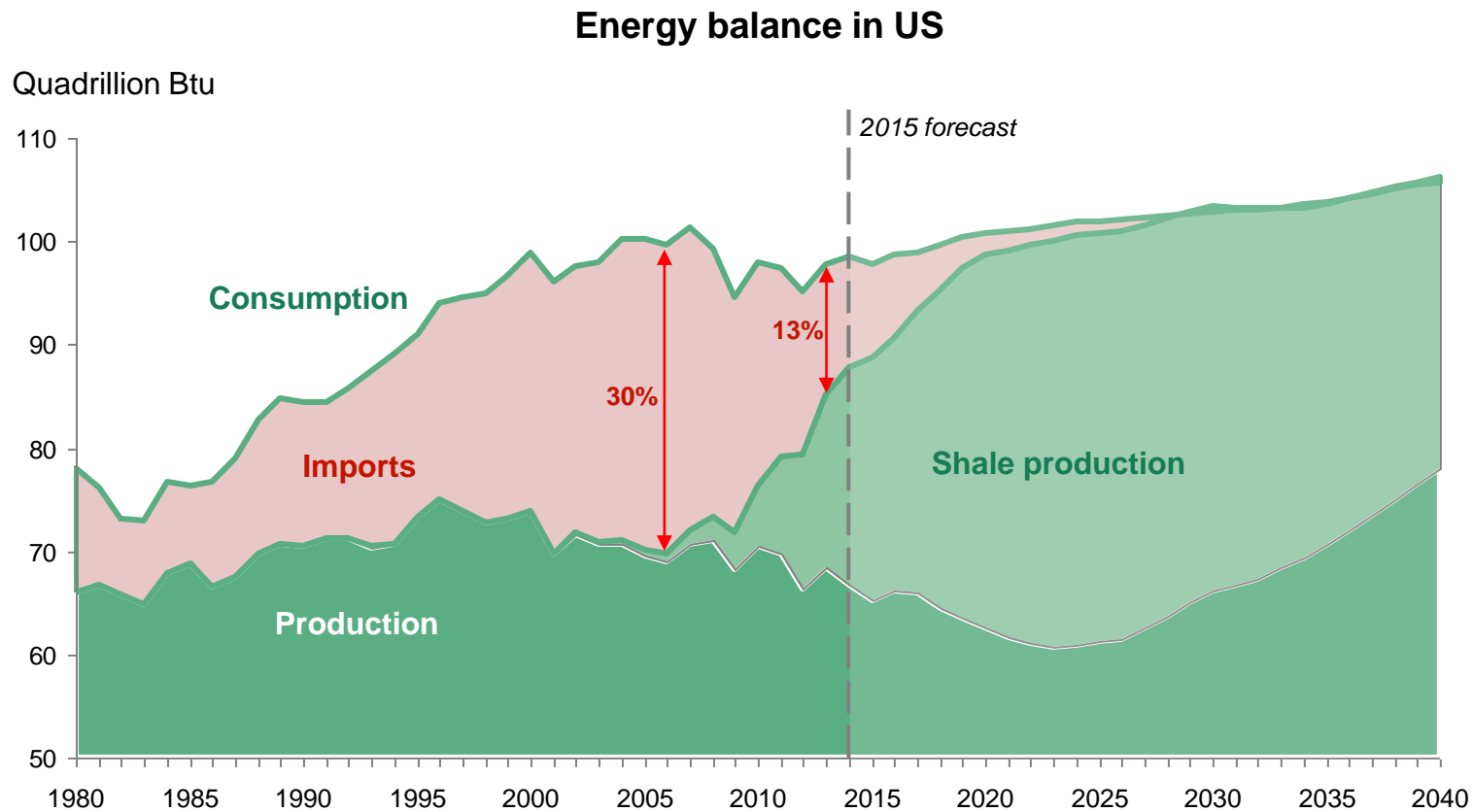


Updated: 6th October 2015

Source: EIA (STEO, October 6th, 2015), BCG Analysis

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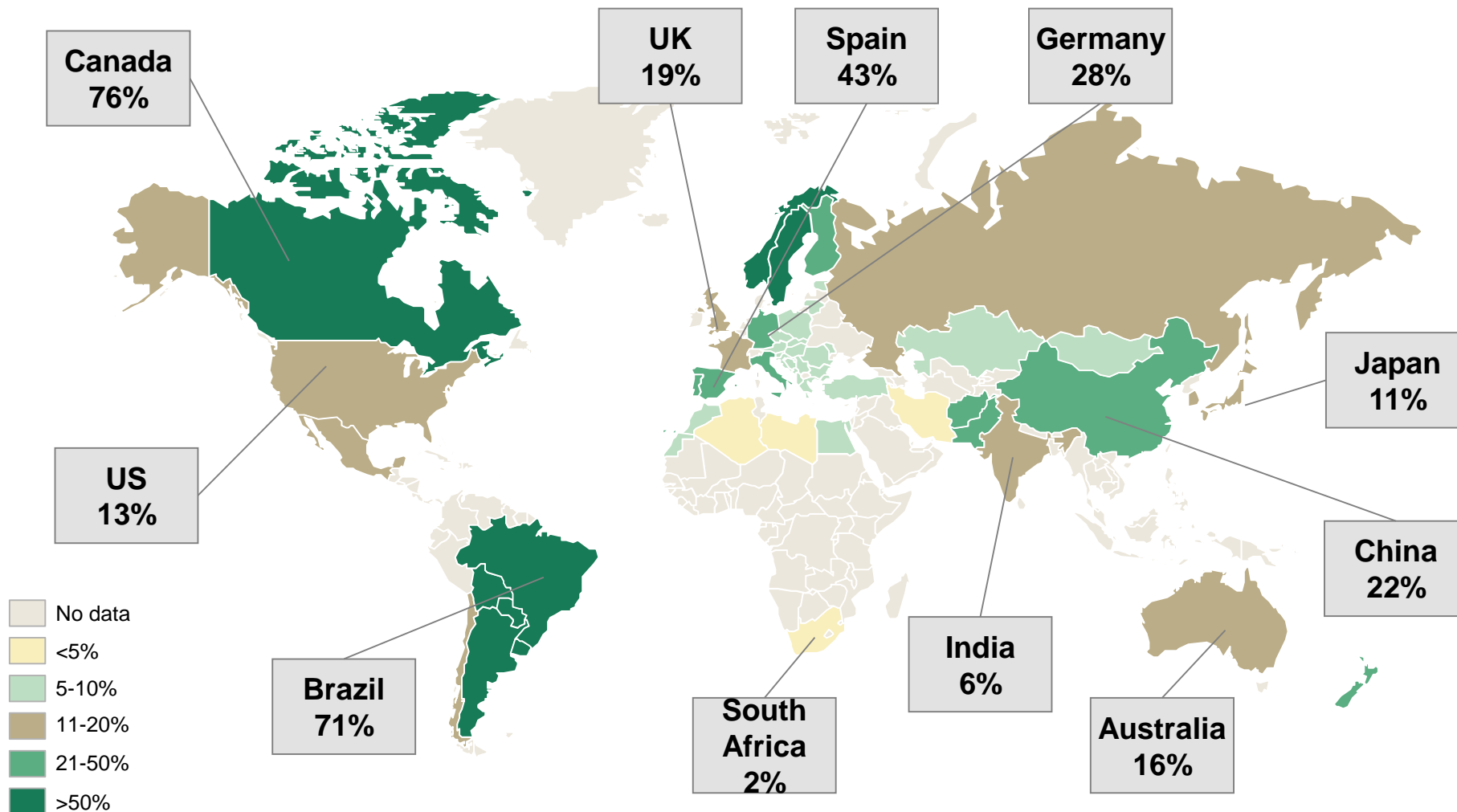
"Shale" revolution has reduced dramatically US energy dependence



US could achieve 100% energy independence by 2030

Renewable energy is becoming increasingly relevant in the energy production mix around the world

Renewables production over total power production (%)



Note: Including hydro in renewables

Source: Bloomberg New Energy Finance; IEA

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