

# ExxonMobil

## 全球能源展望

2018 Outlook for Energy: A View to 2040

## —— 天然气助力中国清洁能源转型

2019年9月19日

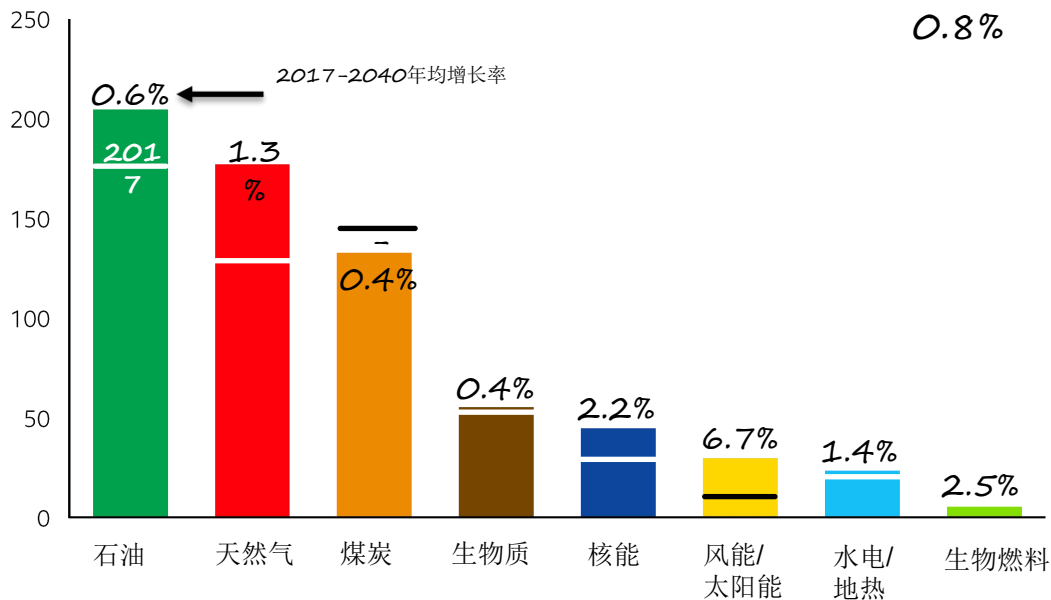
埃克森美孚（中国）投资有限公司  
天然气市场营销总裁  
梁美宝

The Outlook for Energy includes Exxon Mobil Corporation's internal estimates and forecasts of energy demand, supply, and trends through 2040 based upon internal data and analyses as well as publicly available information from external sources including the International Energy Agency. Work on the report was conducted throughout 2017. This presentation includes forward looking statements. Actual future conditions and results (including energy demand, energy supply, the relative mix of energy across sources, economic growth, and geographic regional imports and exports of energy) could differ materially due to many factors, including, but not limited to: The development of new energy sources, political events, changing climate changes, and other factors discussed herein and under the heading "Factors Affecting Future Results" in the Investor's section of our website at [www.exxonmobil.com](http://www.exxonmobil.com). This material is not to be used or reproduced without the permission of Exxon Mobil Corporation. All rights reserved.

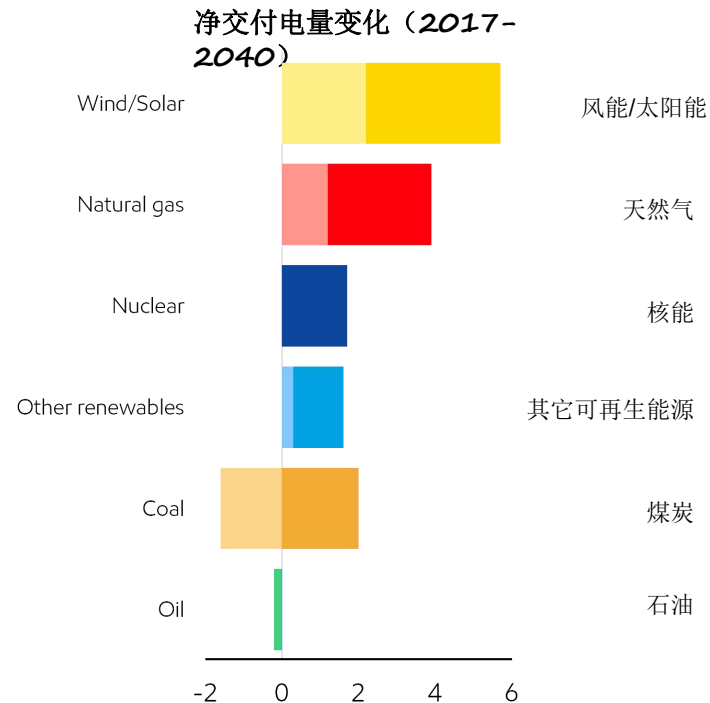
# 全球能源需求

## 2040年按燃料划分

千兆英热单位



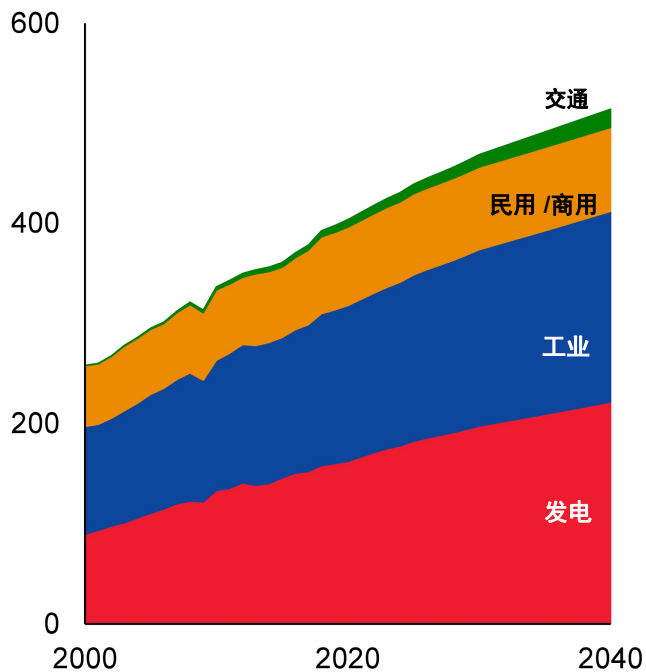
年均增长率  
2017 - 2040  
0.8%



# 全球天然气需求

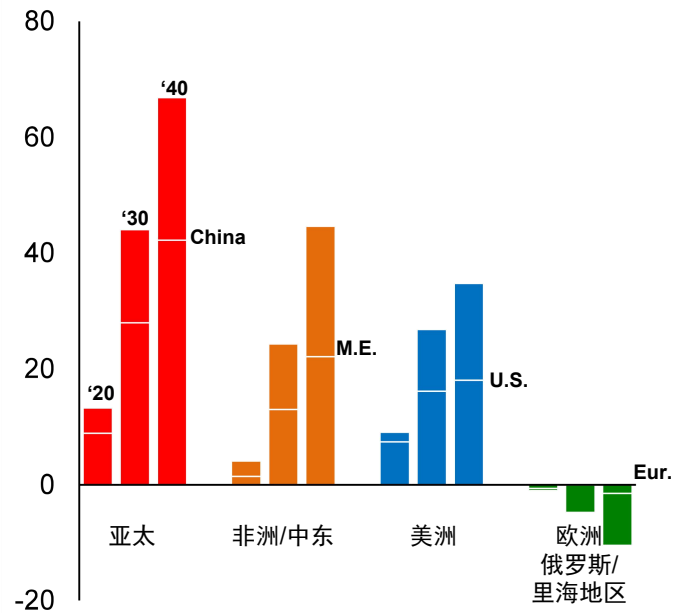
按行业划分

10亿立方英尺/日

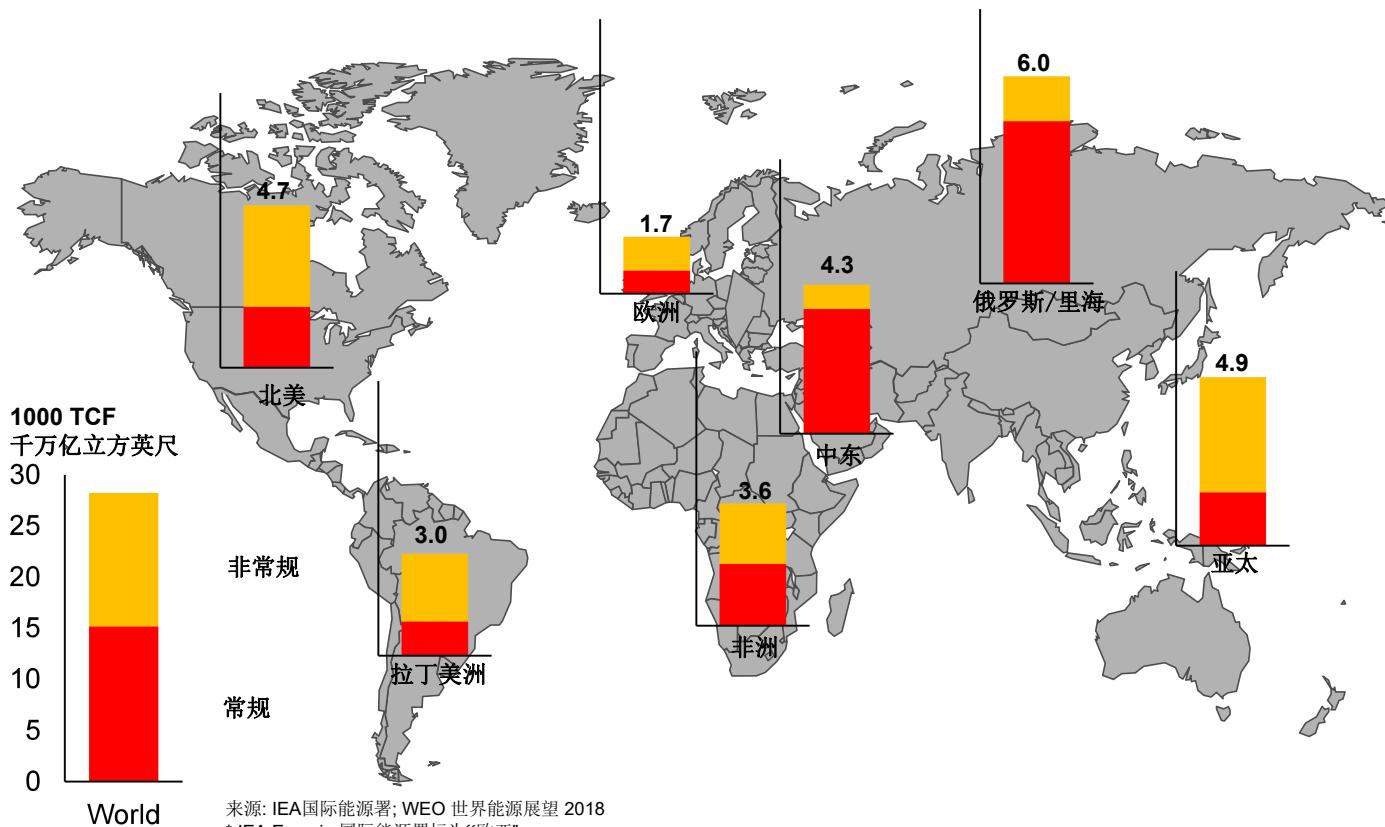


2017年以来增长

10亿立方英尺/日

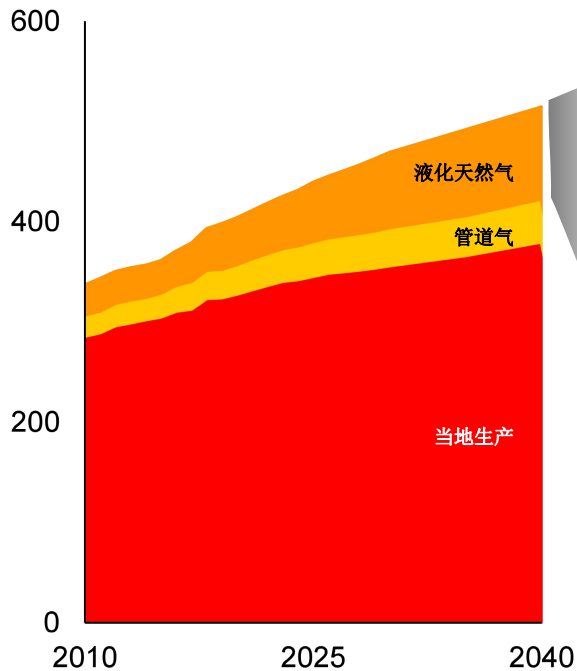


# 全球剩余天然气资源

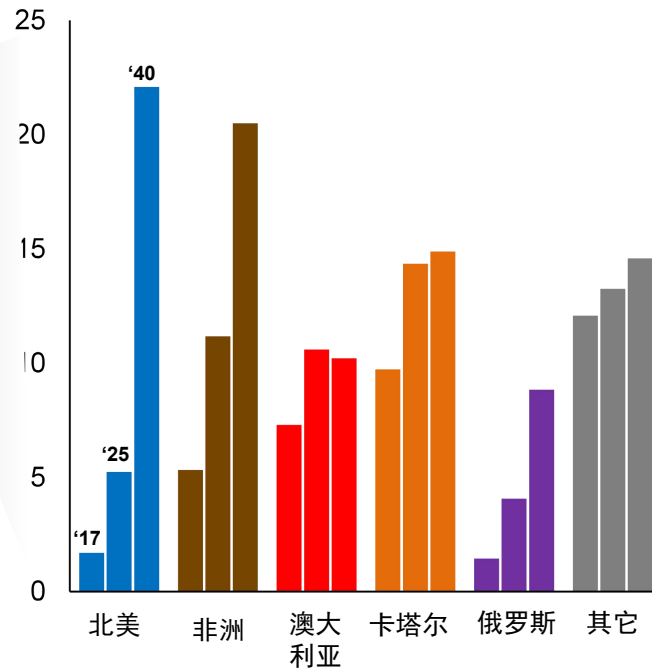


# 天然气贸易

按类型划分  
10亿立方英尺/日

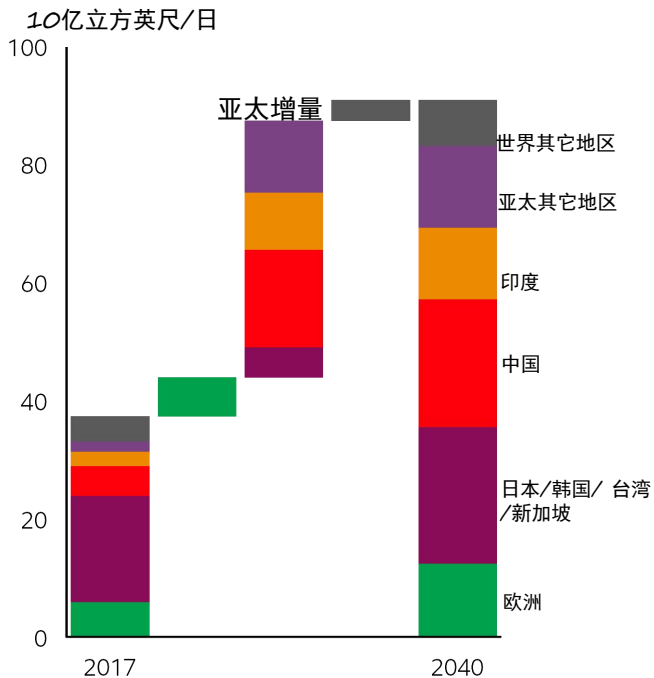


LNG 出口  
10亿立方英尺/日

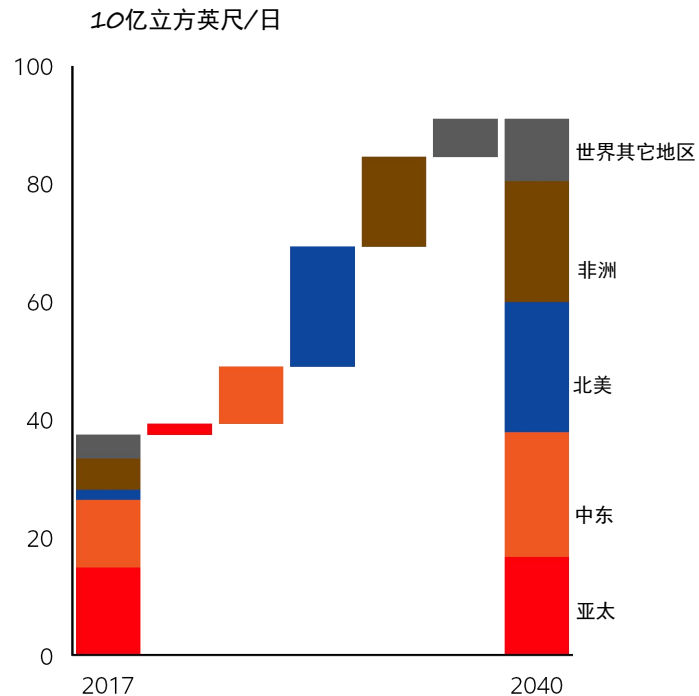


# LNG贸易增长并更加多元化

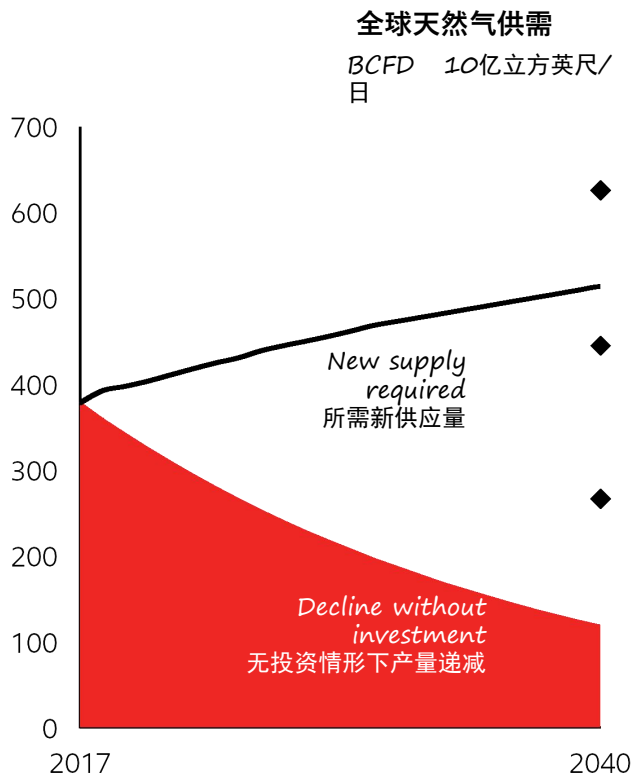
## 欧洲和亚太区主导着LNG进口



## 充足的天然气供应支撑着新的LNG出口



# 满足需求需大量投资



◆ 基于2°C评估方案的高需求

◆ 基于2°C评估方案的平均需求

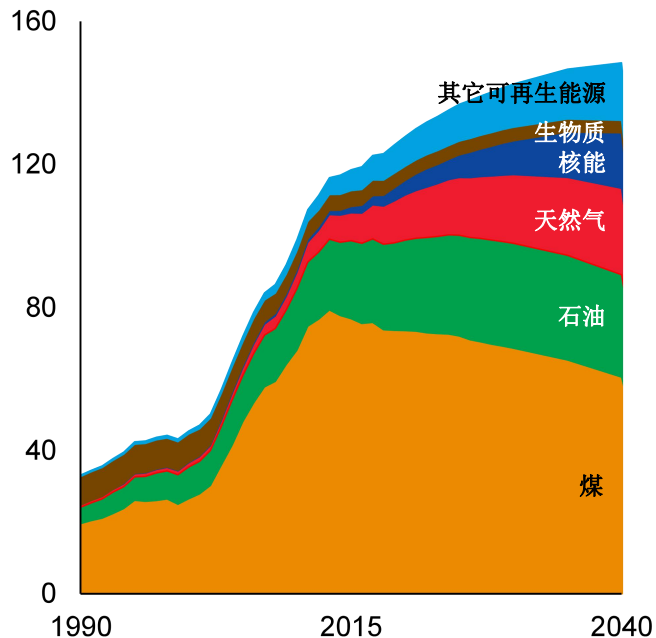
◆ 基于2°C评估方案的低需求

来源: IHS, 埃克森美孚分析  
2°C评估方案基于实现2°C目标路径的EMF2.7 全面技术 /  
450 ppm 情形

# 在中国转向降低碳燃料时二氧化碳排放达到峰值

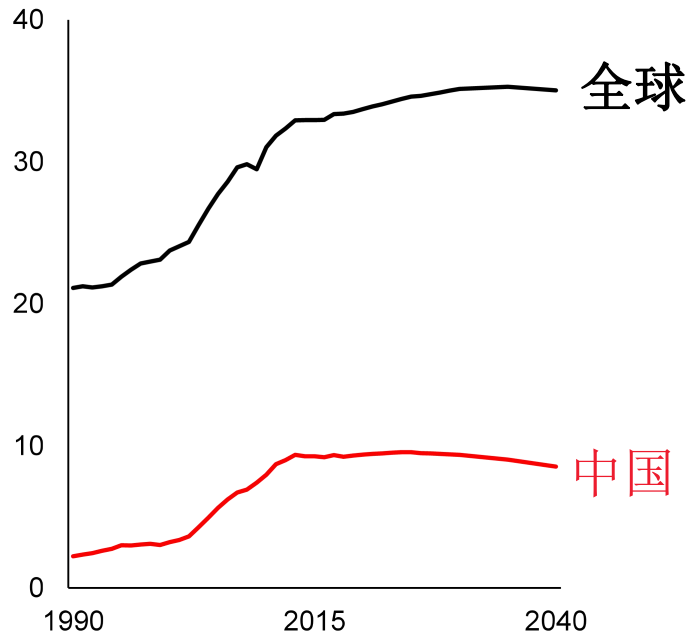
一次能源

千兆英热单位



排放

10亿吨二氧化碳

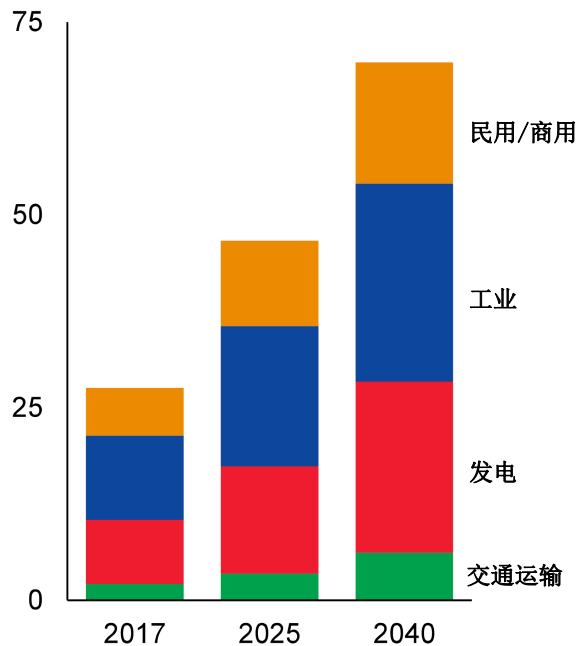




# 中国天然气需求增长迅速，供应多样化

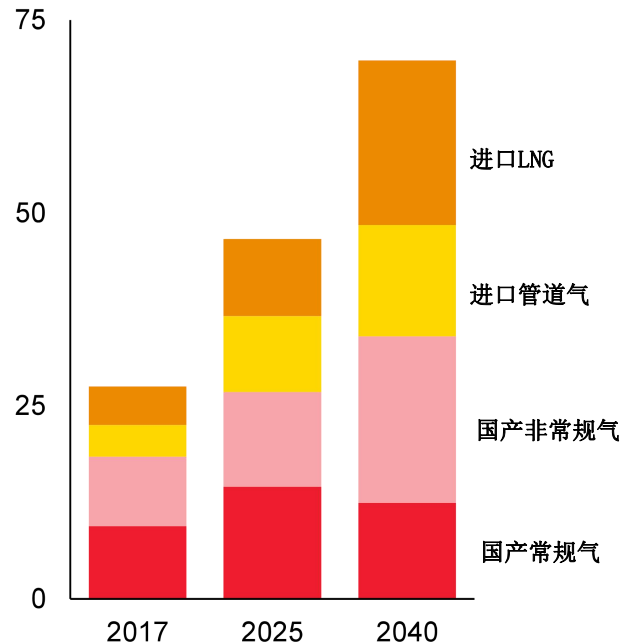
按领域划分天然气需求

10亿立方英尺/日



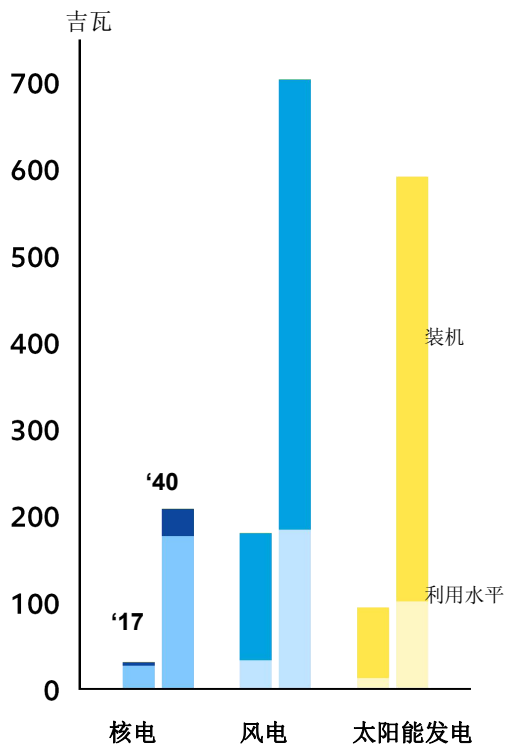
按供应类型划分天然气需求

10亿立方英尺/日

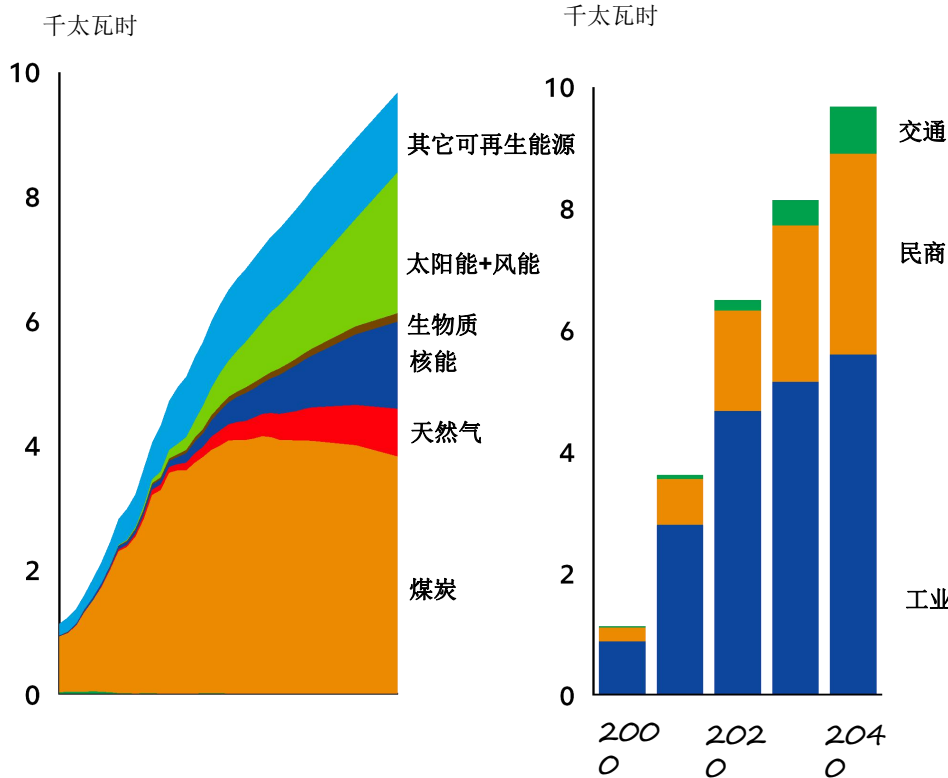


# 中国发电端组合多元化

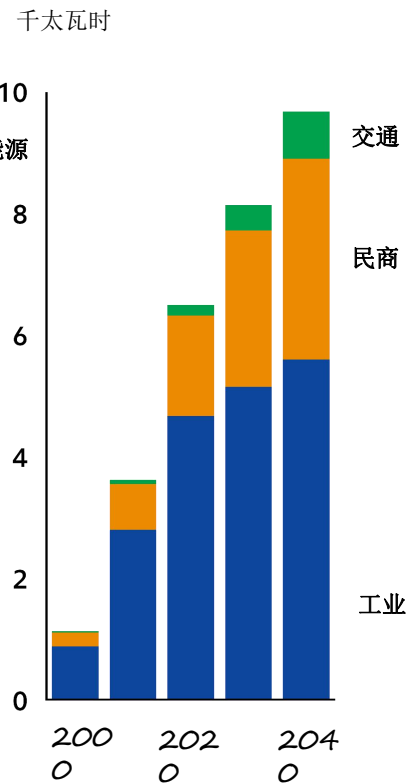
### 装机容量与利用率



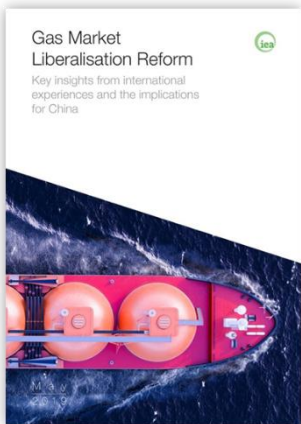
### 按燃料类型划分的净输电量



### 分行业电力需求



# IEA 中国天然气市场化研究建议



透明度

放松价格管制形成价格指数

上游环节市场化

监管的角色：确保市场秩序并提高透明度

过渡期管理

放松价格管制

加强国际合作

谢谢!