

U.S. and Central Asian Roles In Global Energy Markets

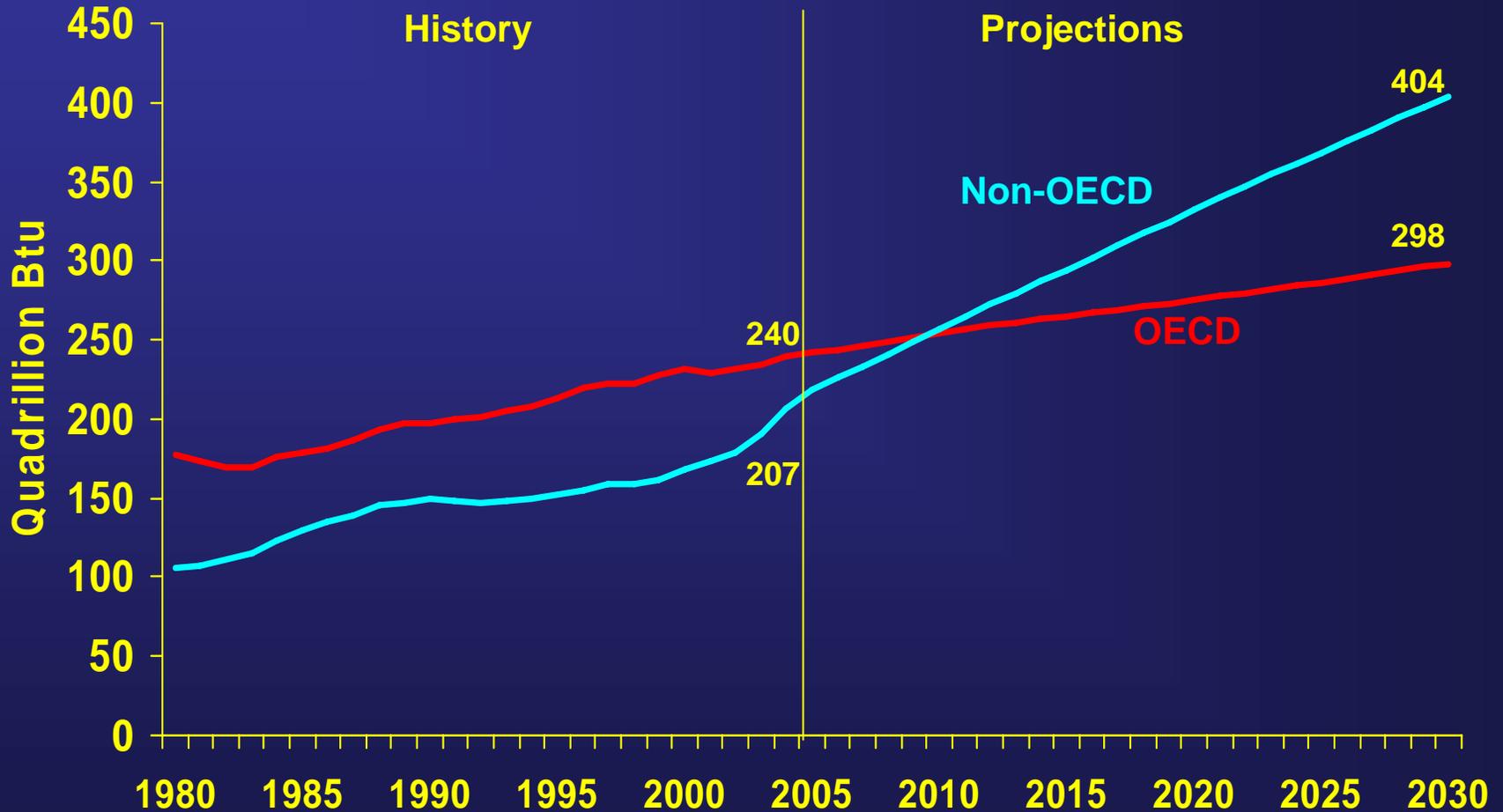
**Guy Caruso
Administrator
Energy Information Administration**

**U.S.-Turkmenistan Energy Roundtable
Washington, DC
September 24, 2007**

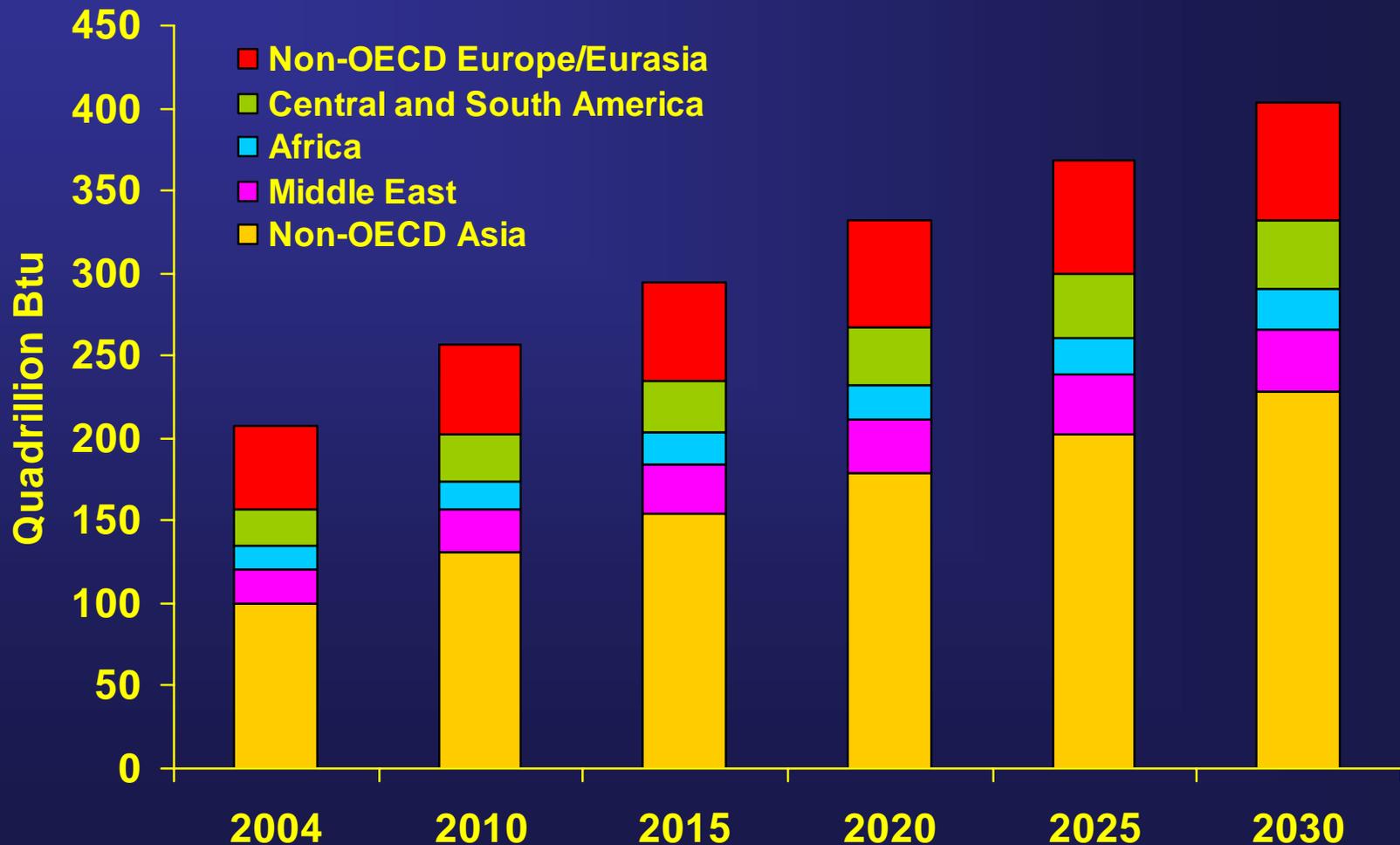
Major Trends in the IEO2007 Outlook

- Total world energy use rises by 57 percent in the reference case projection.
- The high world oil prices in the IEO2007 reference case are projected to make previously uneconomical, unconventional resources available, and they provide 10.5 million barrels per day of the world supply by 2030.
- Coal is the fastest growing energy sources worldwide - increasing by 2.2% per year. Natural gas and renewables each increase by 1.9% per year. Liquids grow by 1.4% per year.
- The Middle East accounts for substantial shares of the world's total increase for liquids (45% of the world total) and natural gas (22%) in the projection period.
- Non-OECD Asia (especially China and India) energy use is expected to more than double between 2004 and 2030 and will rely increasingly on the Middle East to fulfill its oil and natural gas needs.

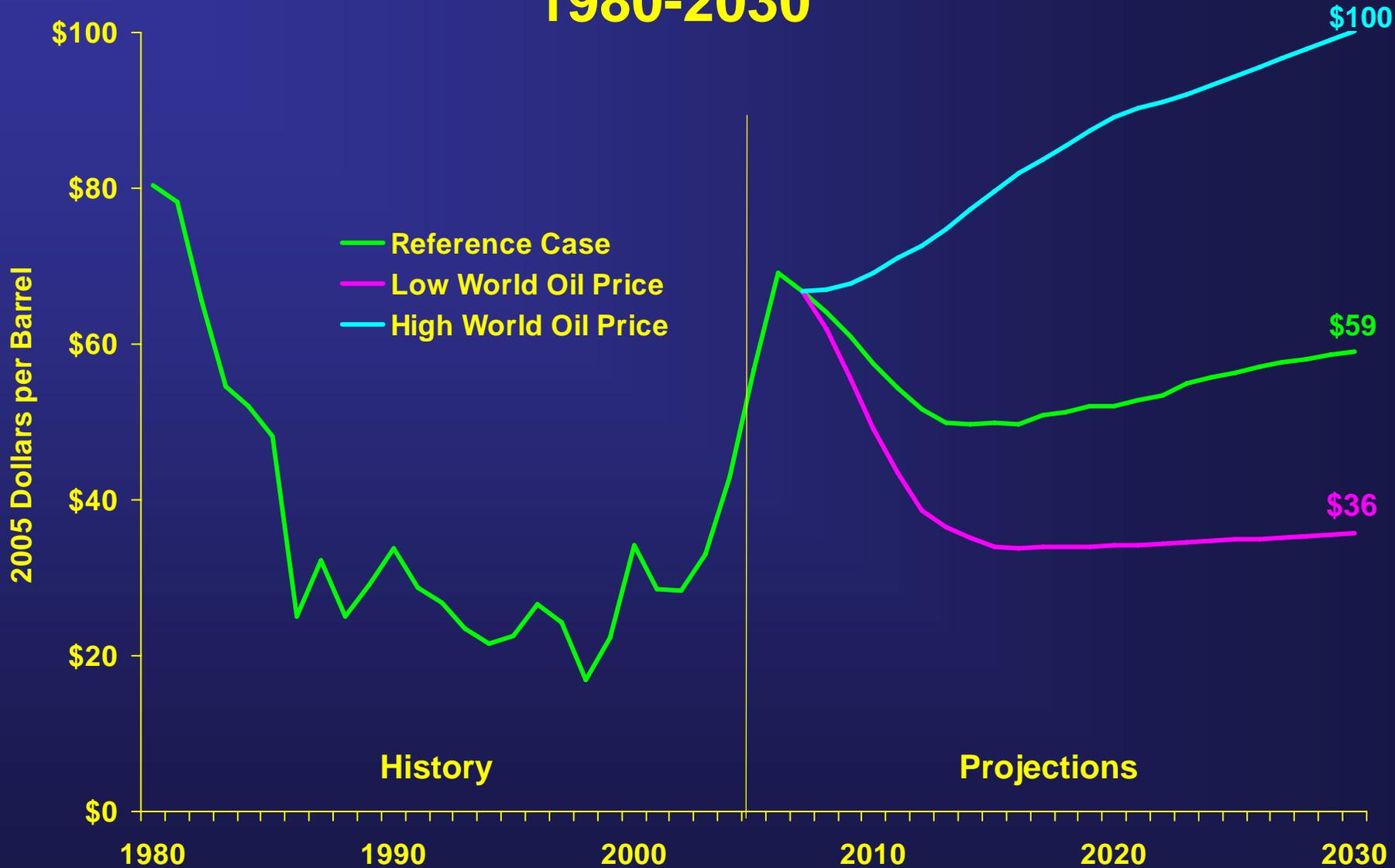
World Marketed Energy Use: OECD and Non-OECD



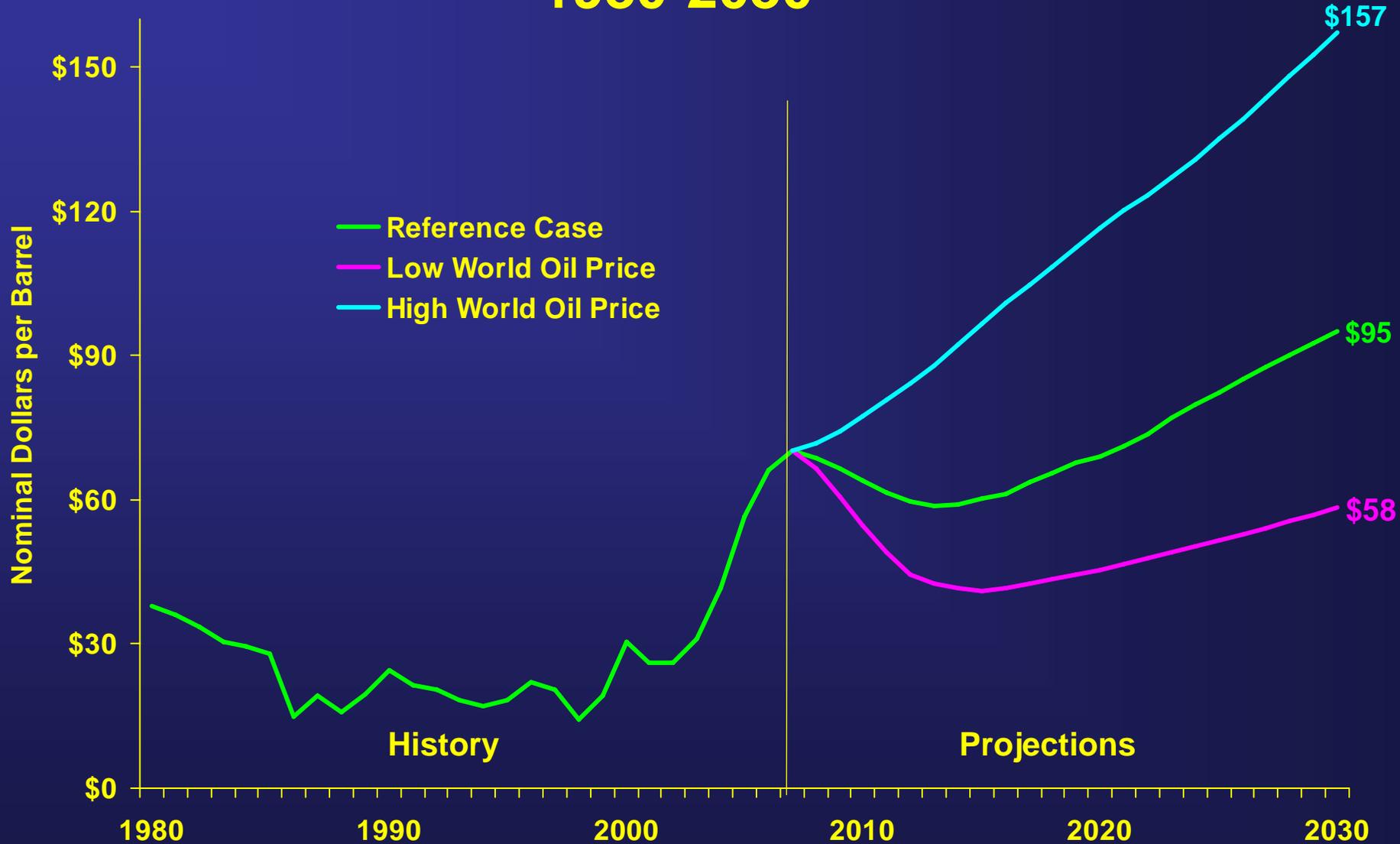
Non-OECD Energy Consumption by Region



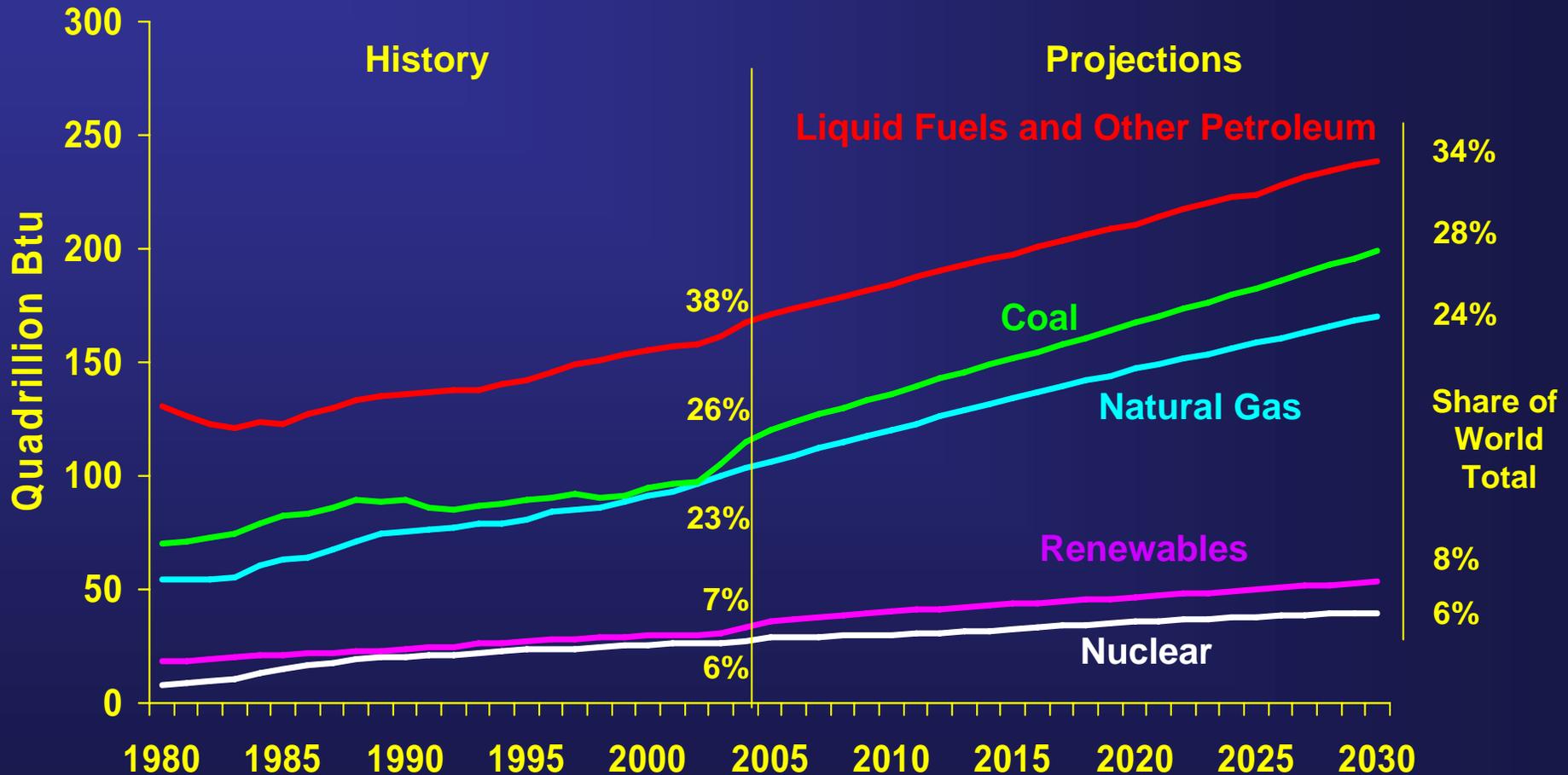
World Oil Prices in Three World Oil Price Cases, 1980-2030



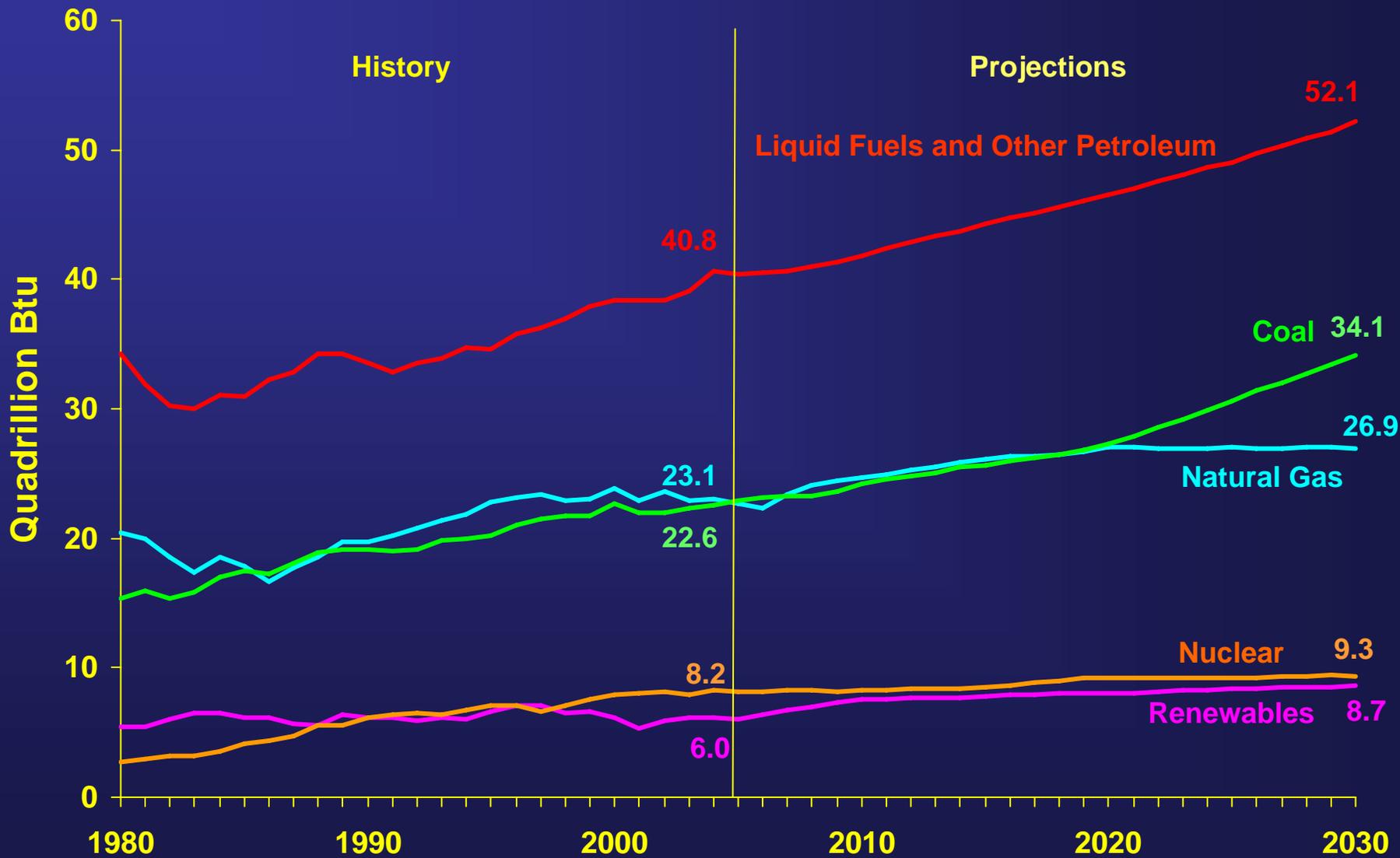
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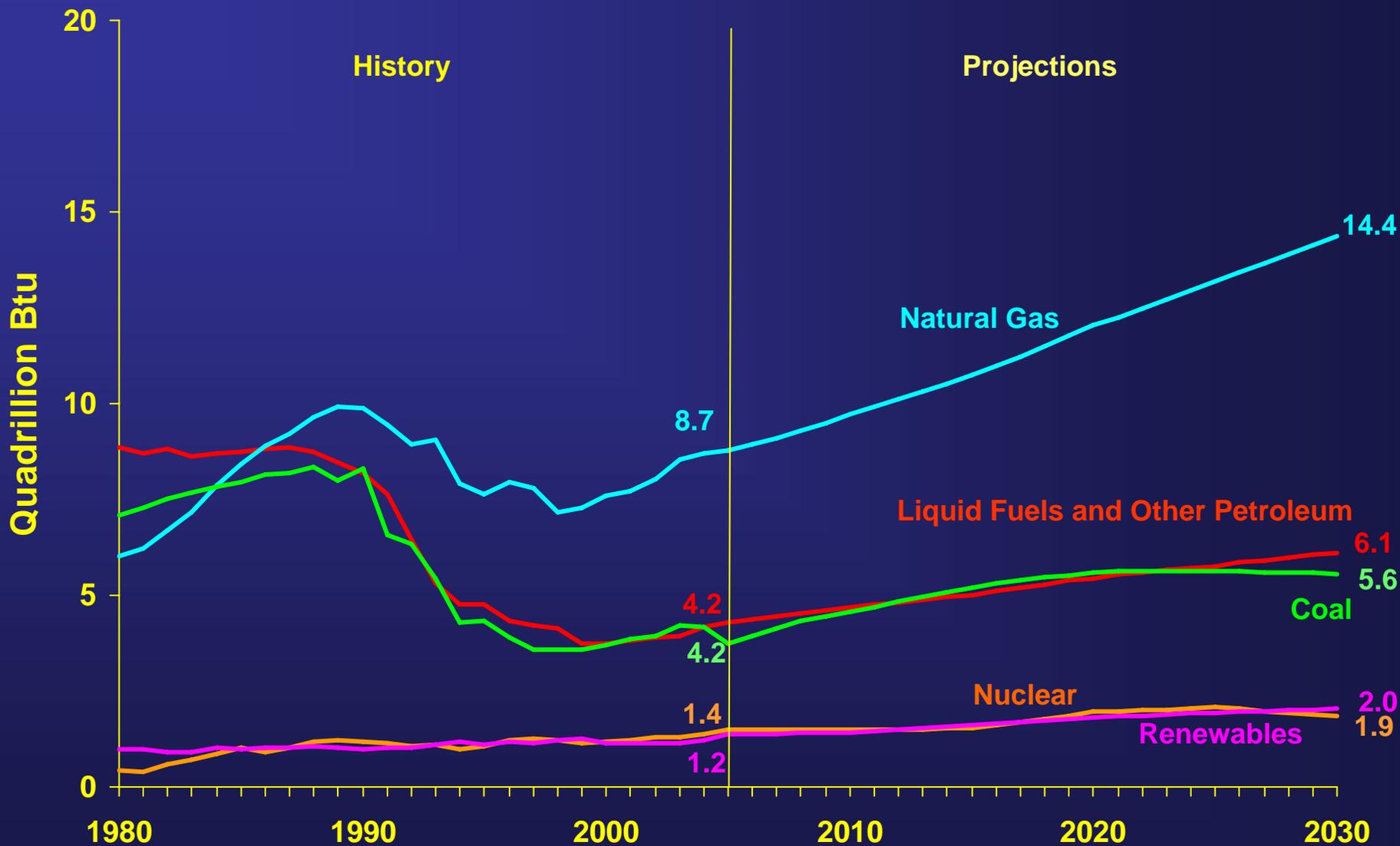
World Marketed Energy Use by Fuel Type



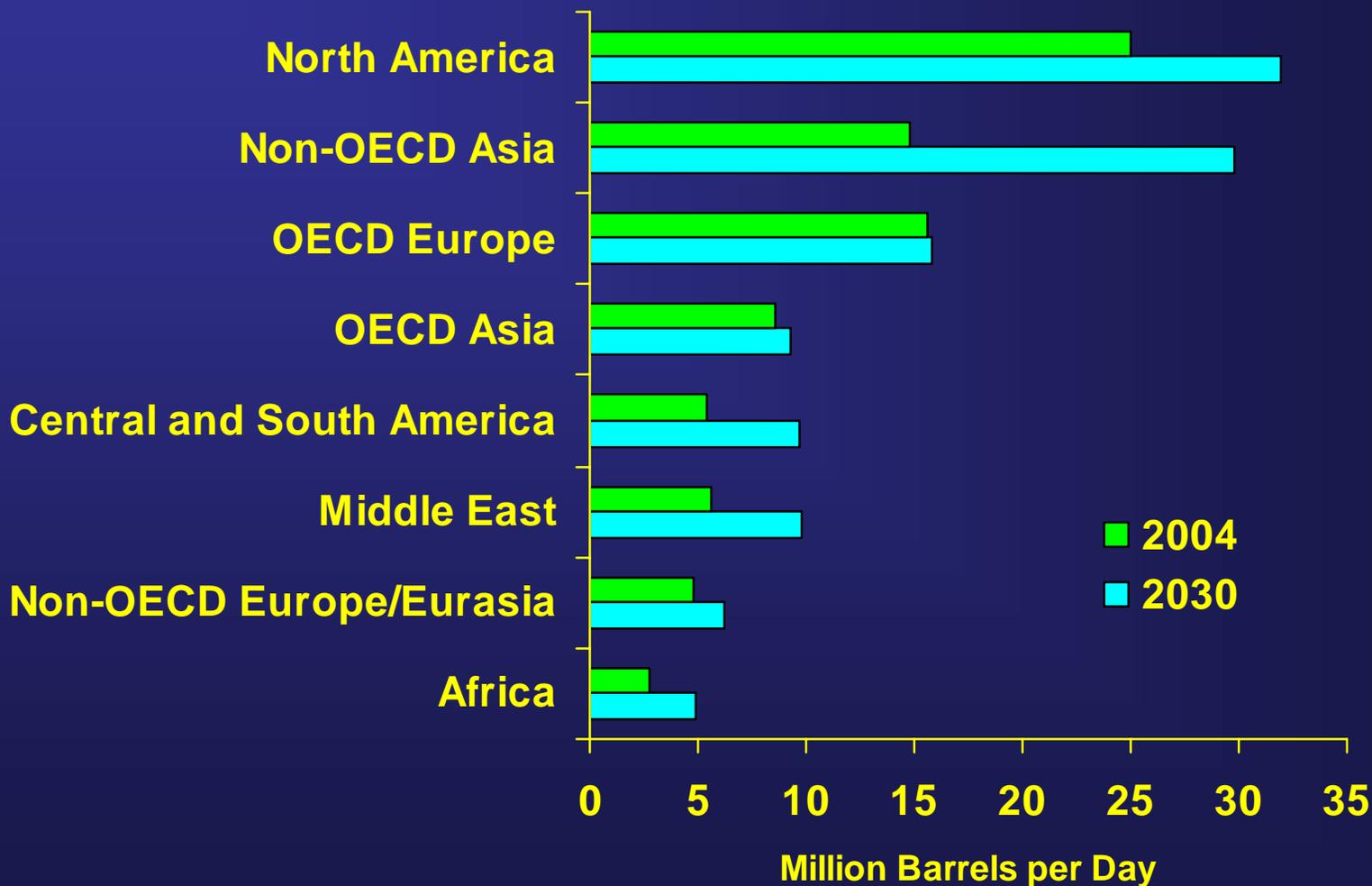
U.S. Primary Energy Consumption by Fuel



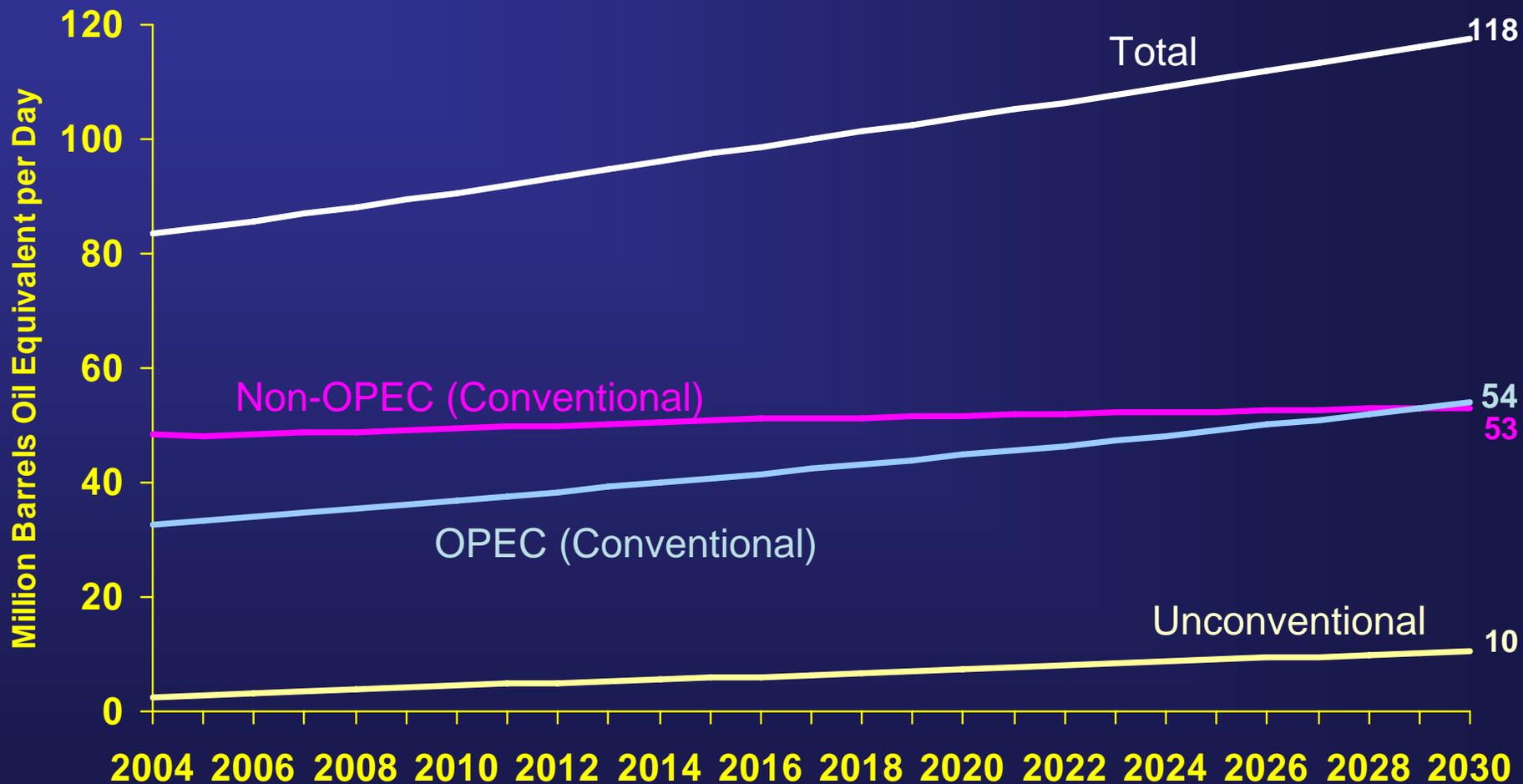
Non-OECD Europe/Eurasia* Energy Use by Fuel



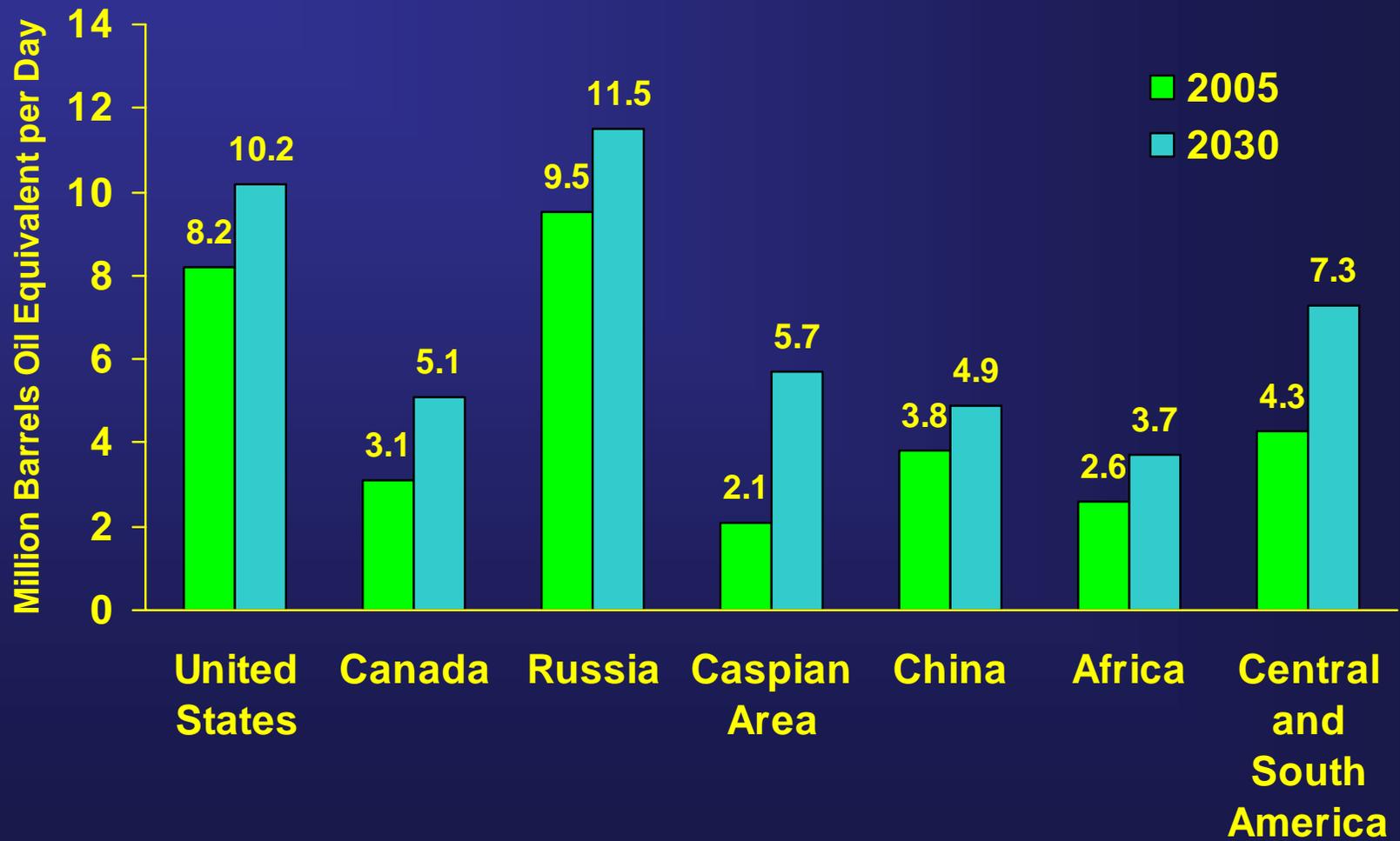
World Liquids Consumption by Region, 2004 and 2030



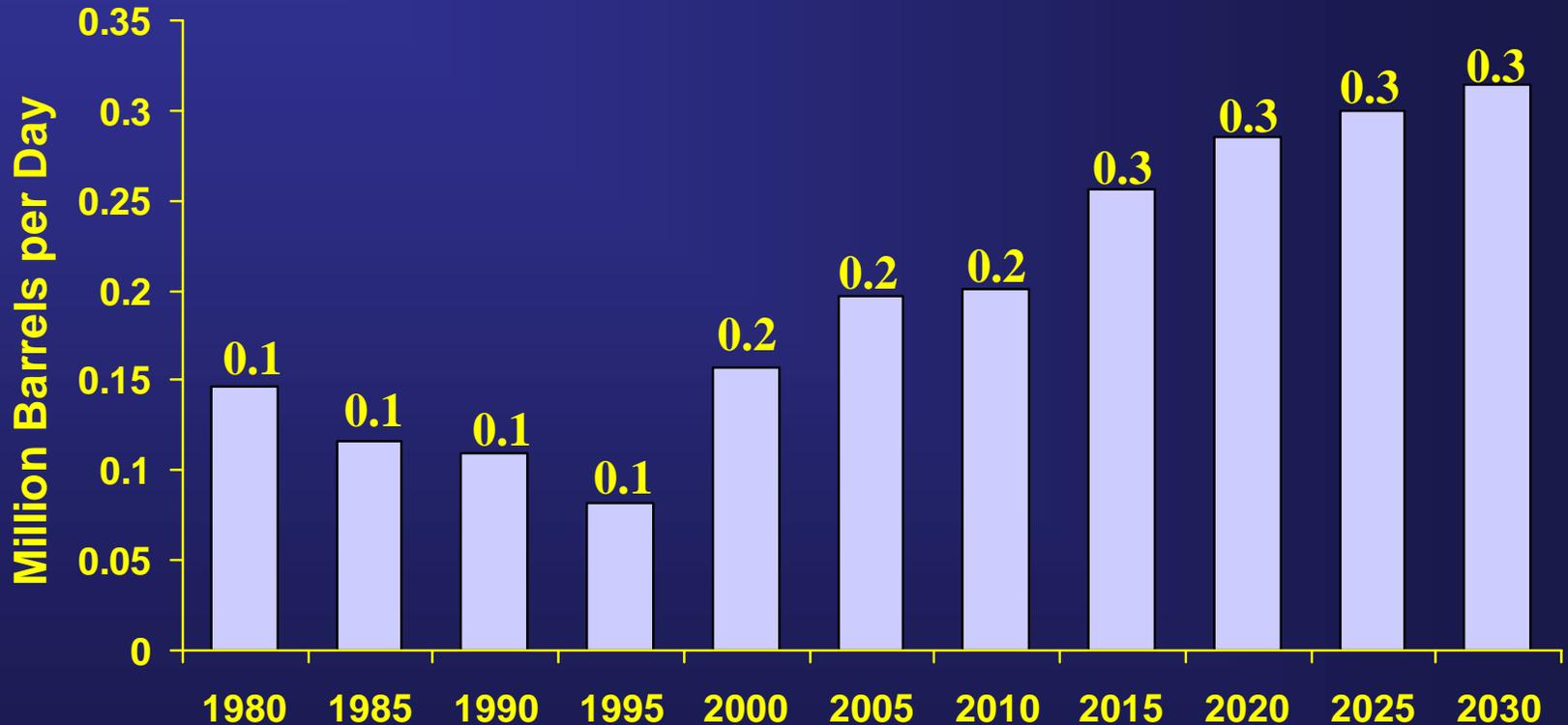
World Liquids Production, 2004-2030



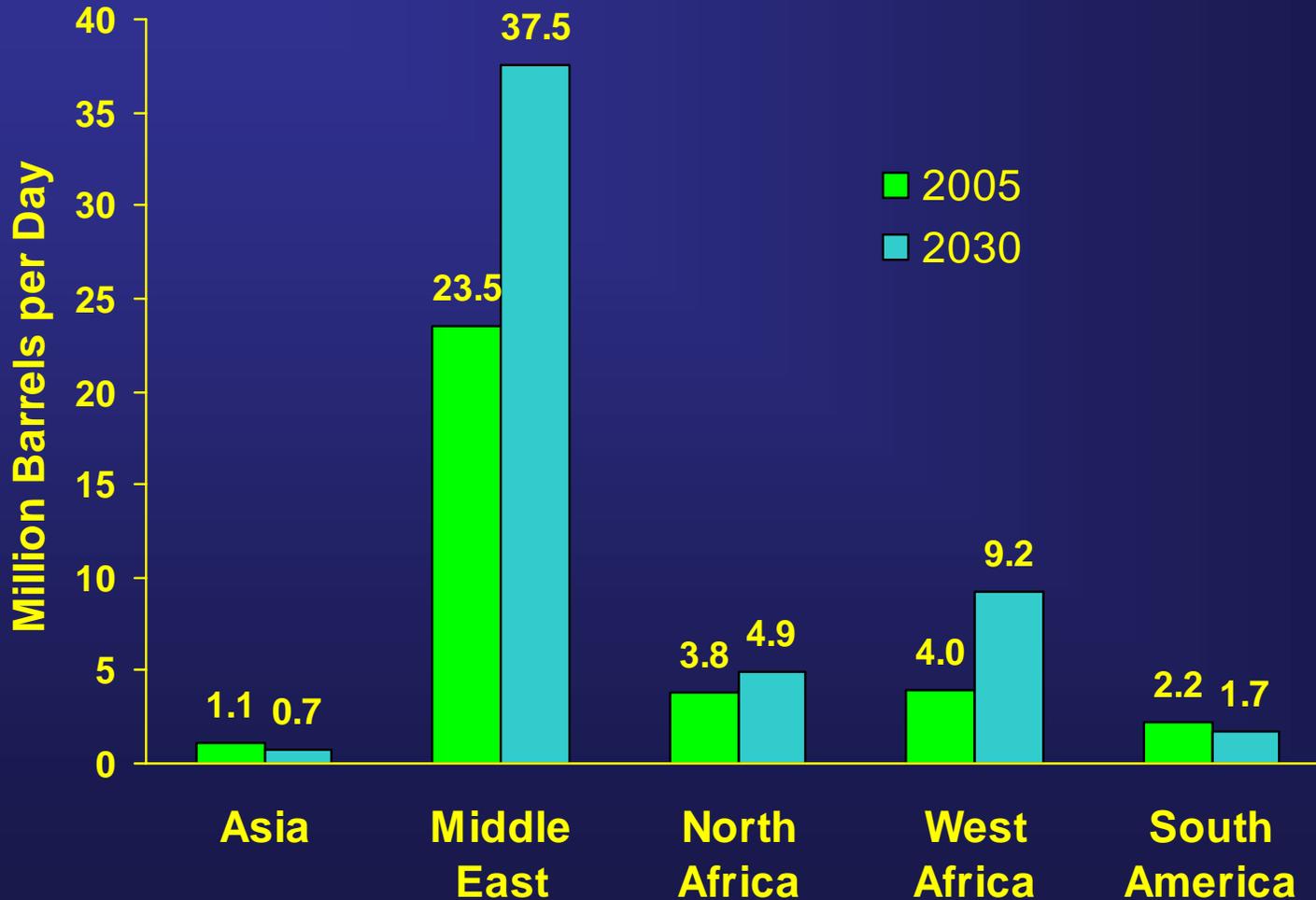
Non-OPEC Producing Regions With More than a One Million Barrel Per Day Increase in Total Production Over the Forecast Period, 2005 and 2030



Oil Production in Turkmenistan

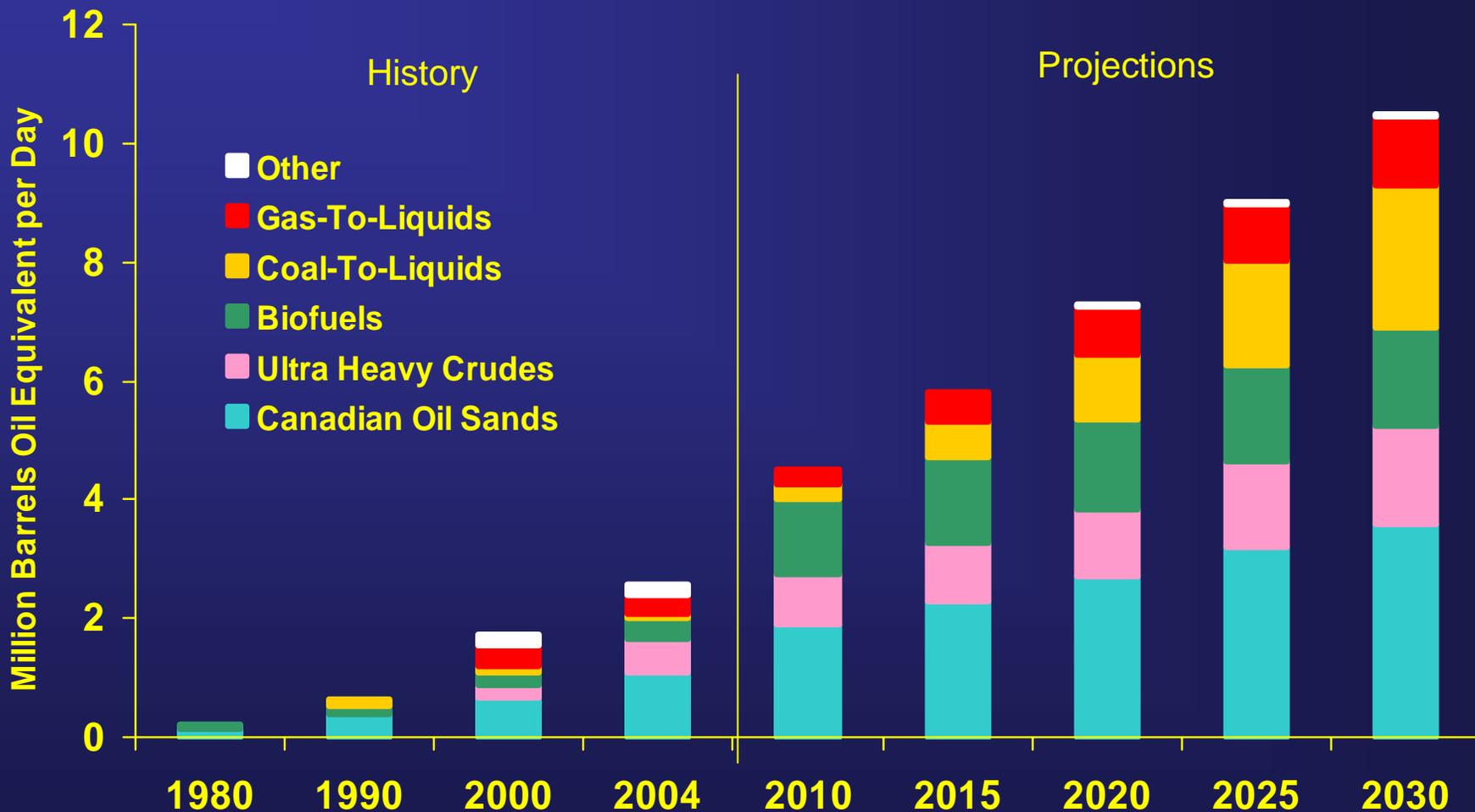


OPEC Conventional Liquids Production



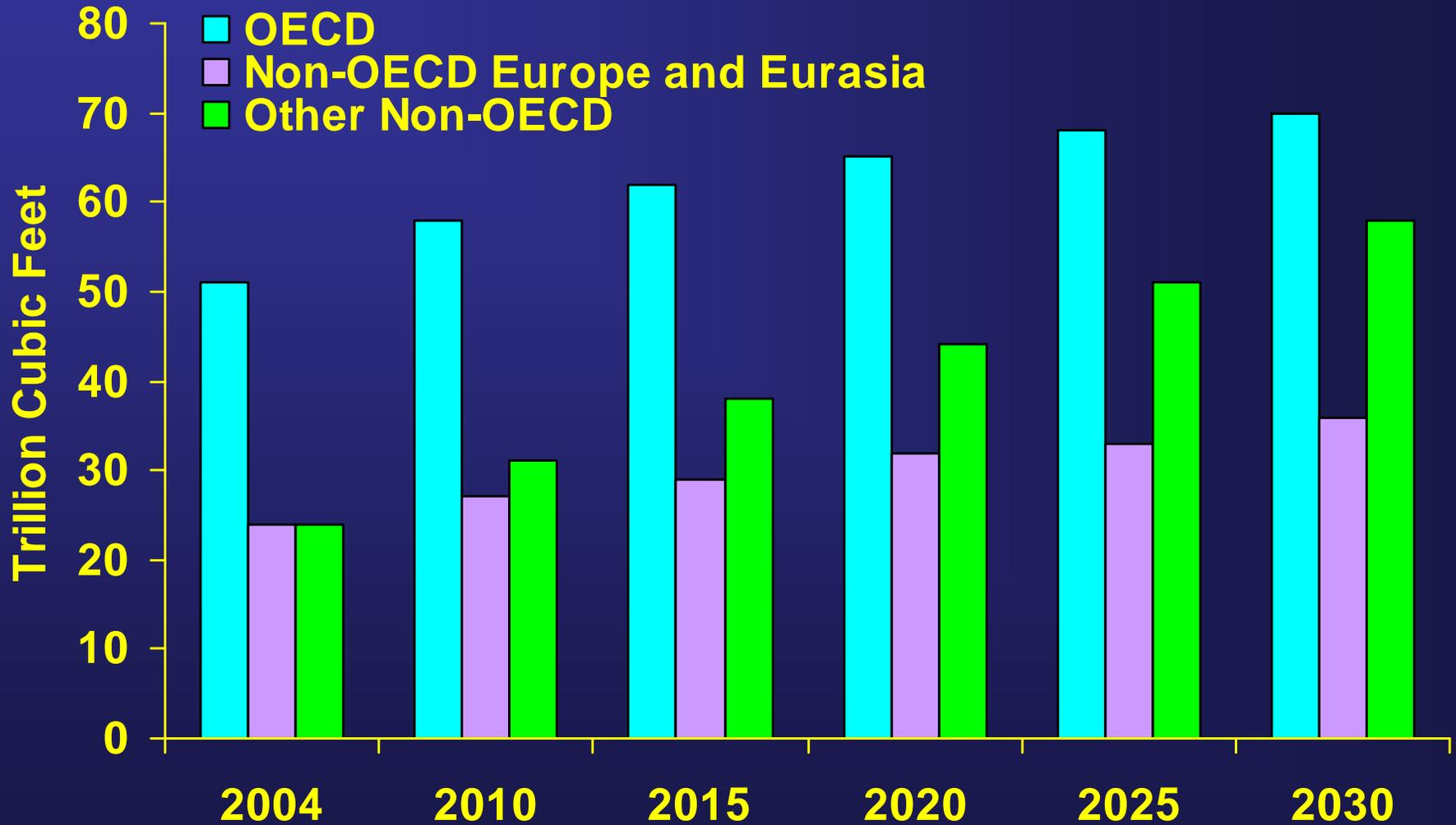
Source: EIA, IEO2007

World Unconventional Liquids Production in the Reference Case, 1980-2030



Note: "Other" includes shale oils and other unidentified sources of unconventional liquid fuels. Source: EIA, IEO2007

World Natural Gas Consumption by Region



Source: EIA, IEO2007

Imports from Turkmenistan represent 15 Percent of Russia's Natural Gas Exports

Russia's Natural Gas Balance (2000-2006), Billion Cubic Meters

	2000	2001	2002	2003	2004	P2005	P2006
Production	584	580	595	616	634	640	656
Consumption	400	408	412	433	453	457	470
Gas Exports	217.1	200.1	201.2	203.7	217.9	222.3	262.5
Gas Imports	37.3	19.7	26.1	13.1	21	24.3	62.9
Kazakhstan	5.3	3.8	7.2	7.1	6.6	12.4	14.4
Turkmenistan	29.1	15.5	14	4.3	7	3.4	38.5
Latvia	0.6	0.4	0.4	0.4	0.3	0.3	0.4

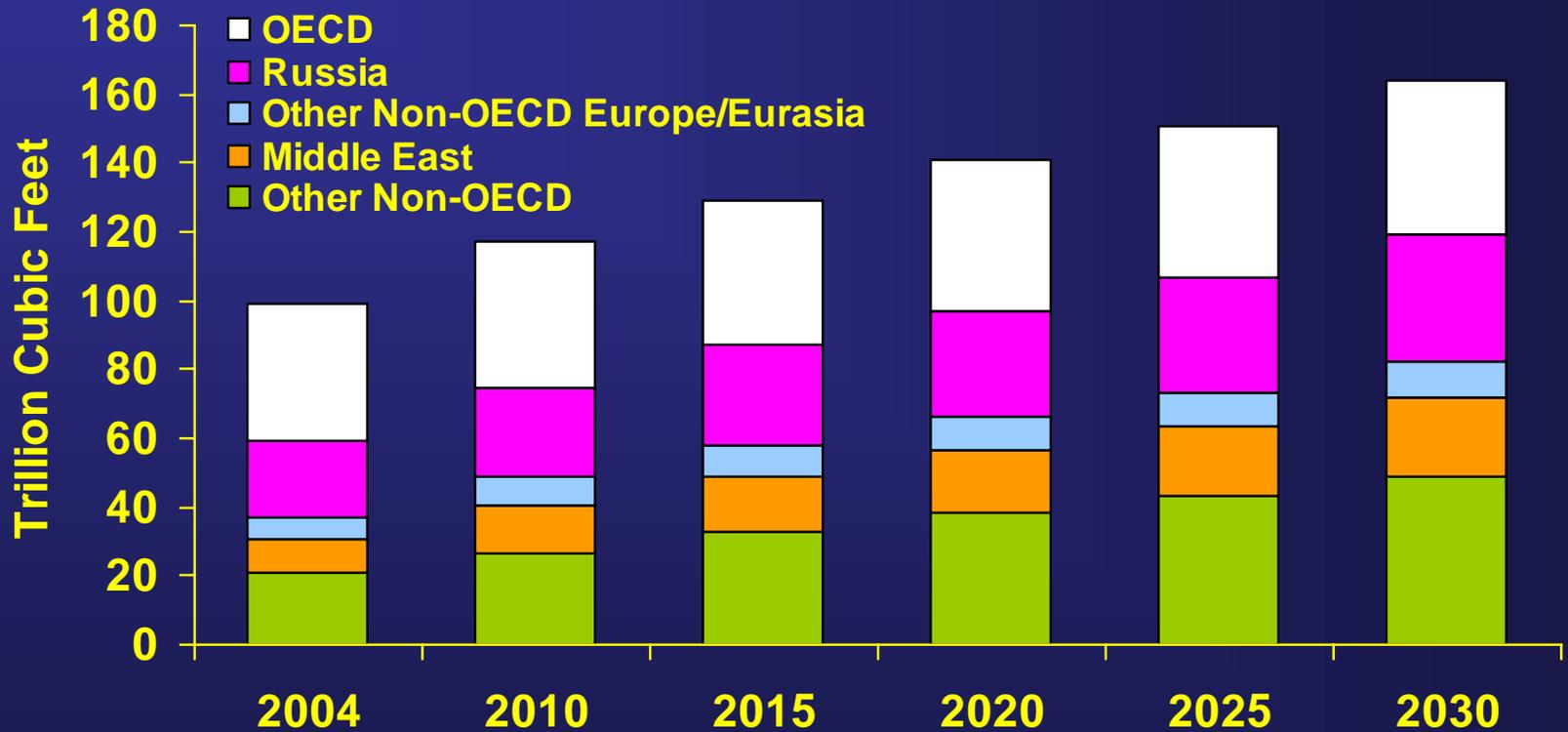
Source: EIA (Prod'n/Consumption), Renaissance Capital & CERA, 2006.

Current and Proposed Caspian Natural Gas Infrastructure

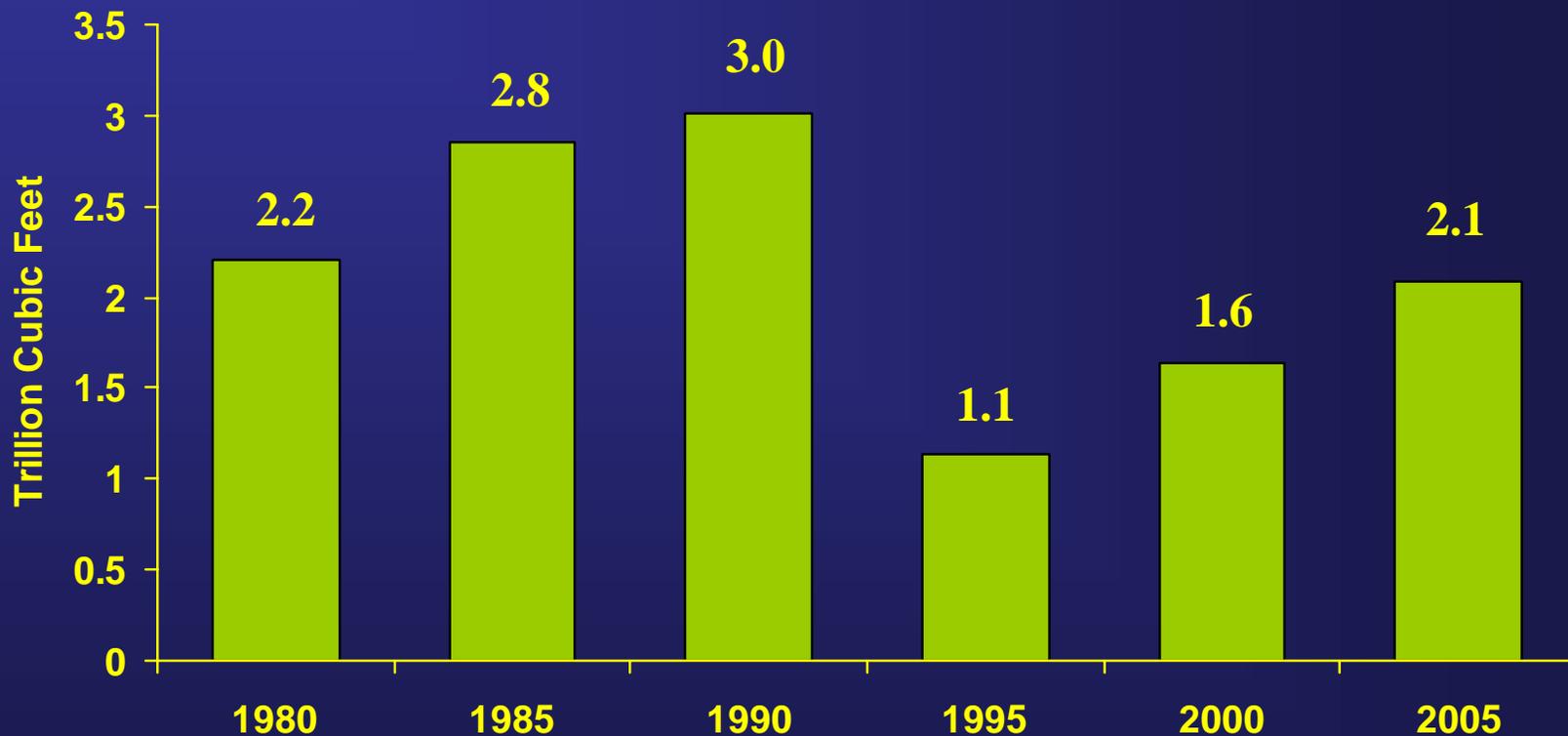
Source: DI Cartography Center, US Government.



World Natural Gas Production by Region, 2004-2030



Natural Gas Production in Turkmenistan



Periodic Reports

Petroleum Status and Natural Gas Storage Reports, weekly

Short-Term Energy Outlook, monthly

Annual Energy Outlook 2007, February 2007

International Energy Outlook 2007, May 2007

Examples of Special Analyses

“Economic Effects of High Oil Prices,” Annual Energy Outlook 2007

Analysis of Oil and Gas Production in the Arctic National Wildlife Refuge,

March 2004

The Global Liquefied Natural Gas Market: Status and Outlook, Dec 2003

“Restricted Natural Gas Supply Case,” Annual Energy Outlook 2005

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