

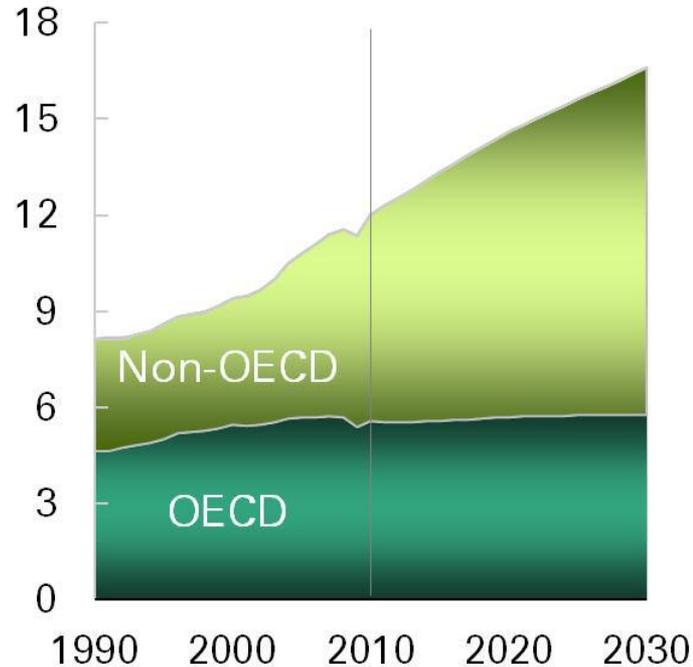


BP Energy Outlook 2030

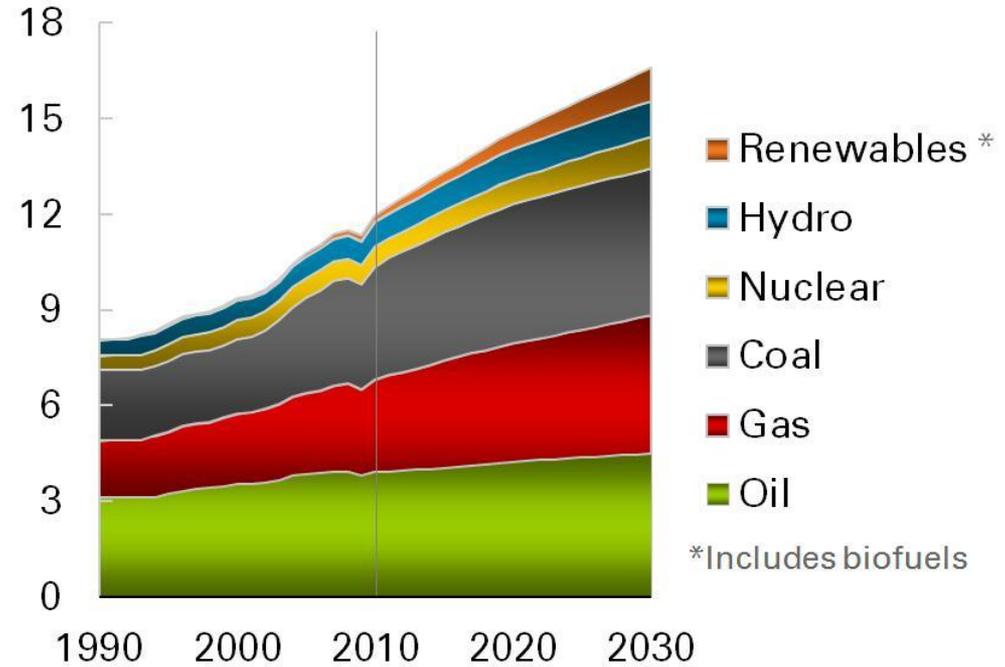
Moscow, October 19, 2012

Non-OECD economies continue to drive consumption growth

Billion toe



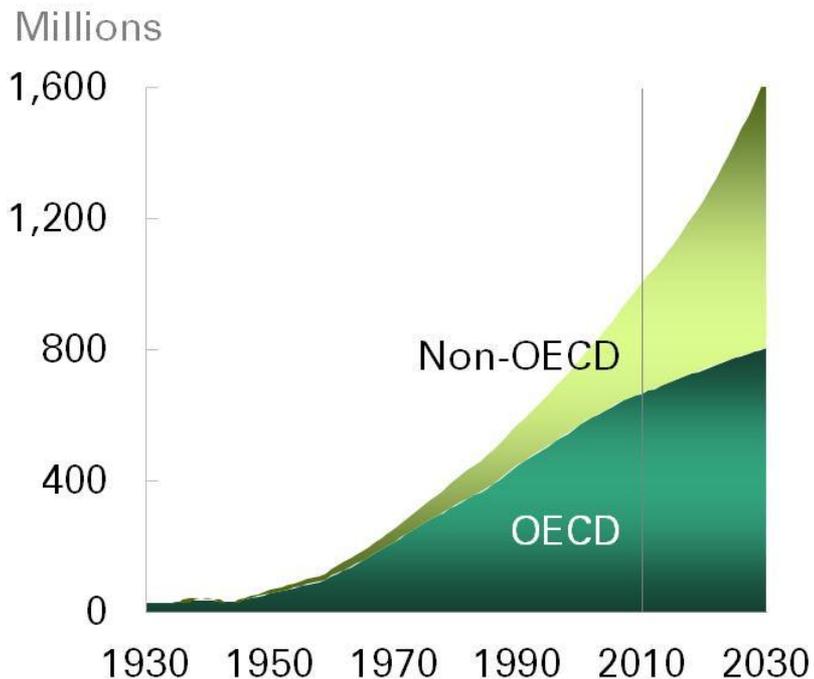
Billion toe



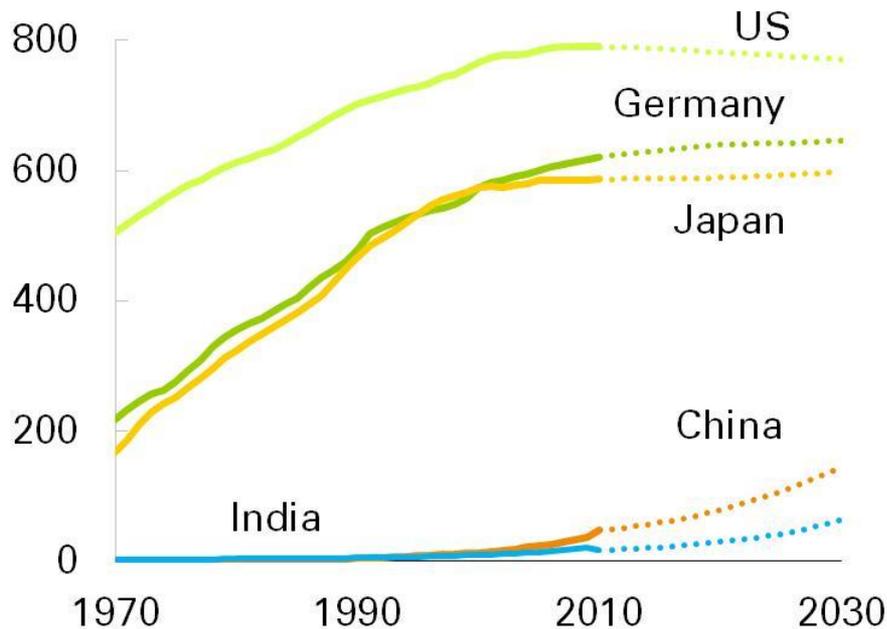
- Renewables *
 - Hydro
 - Nuclear
 - Coal
 - Gas
 - Oil
- *Includes biofuels

Vehicle numbers are set to grow rapidly in the Non-OECD

Total number of vehicles

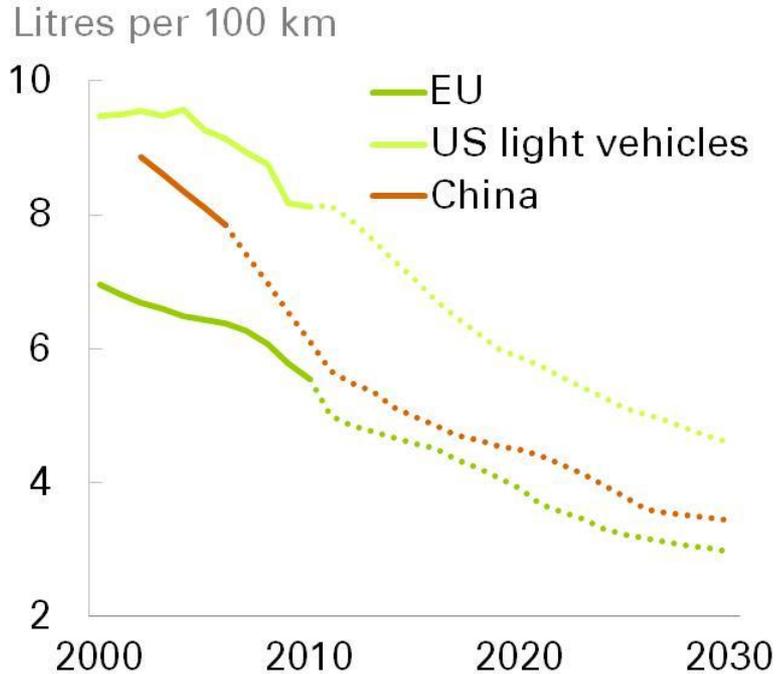


Vehicles per thousand people

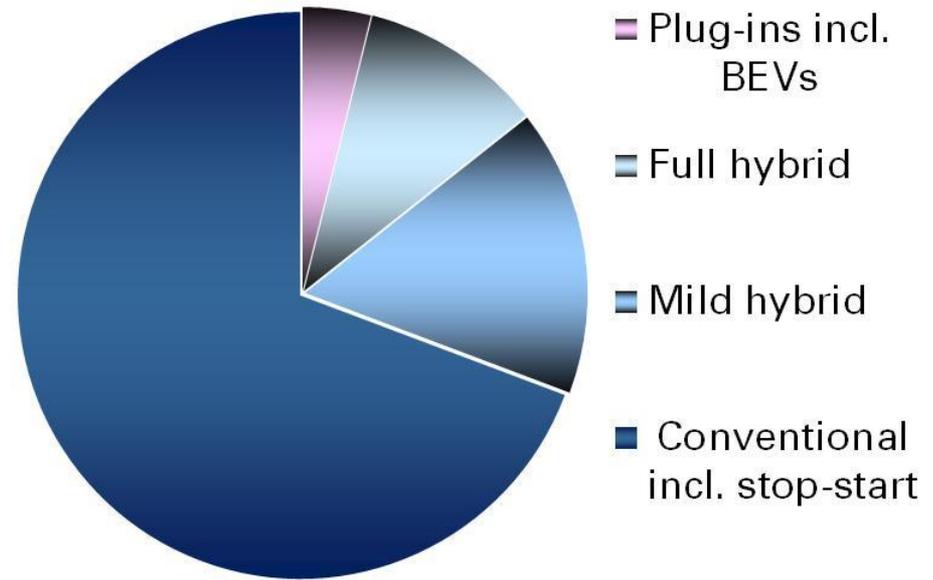


Policy and technology enable efficiency improvements

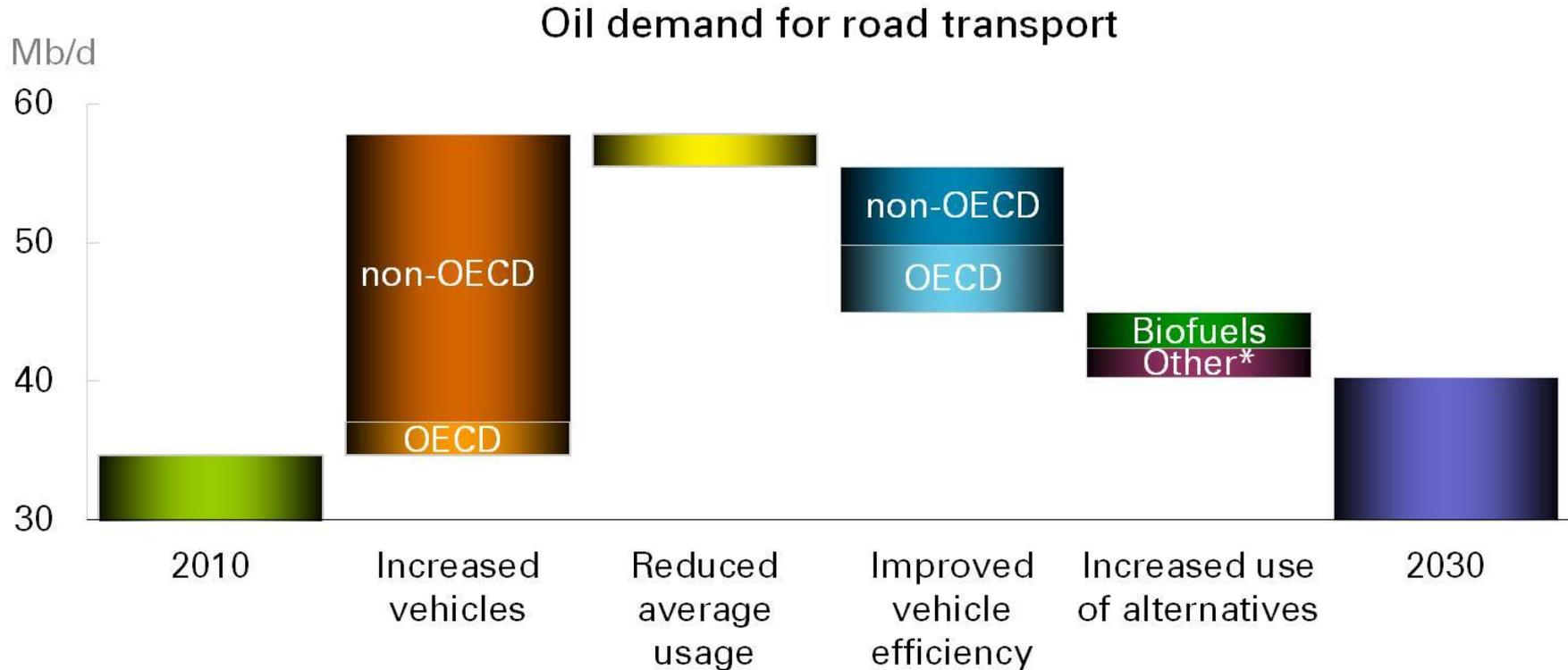
Projected car efficiency



Global vehicle fleet in 2030



Efficiency gains have the biggest impact on oil demand

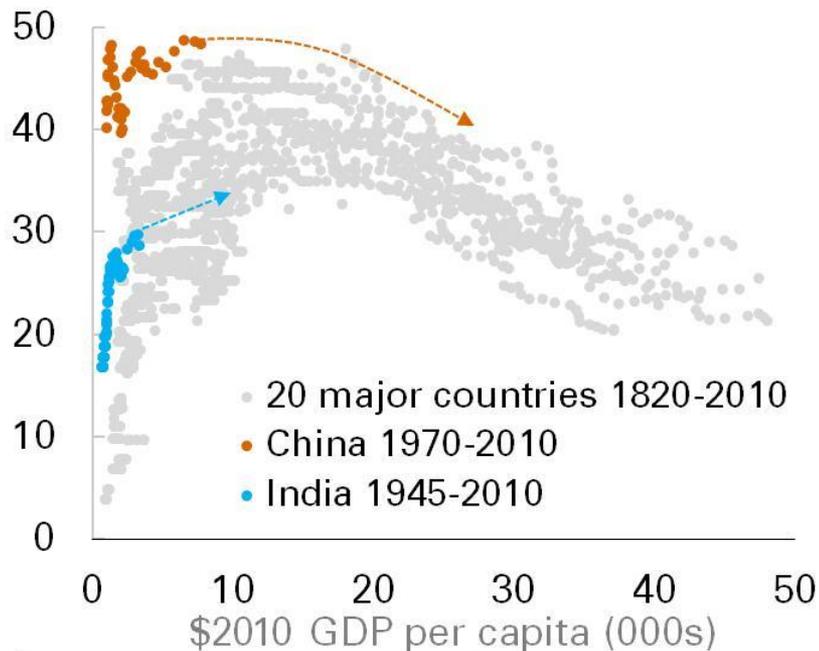


* Includes GTL, CTL, CNG, LNG and electricity

Patterns of development

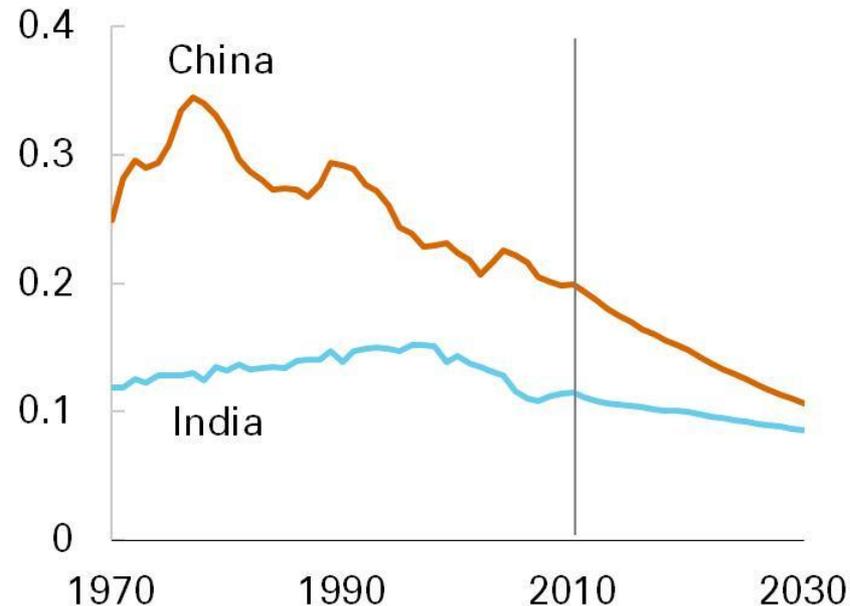
Industrialisation

Industry as %GDP



Energy intensity

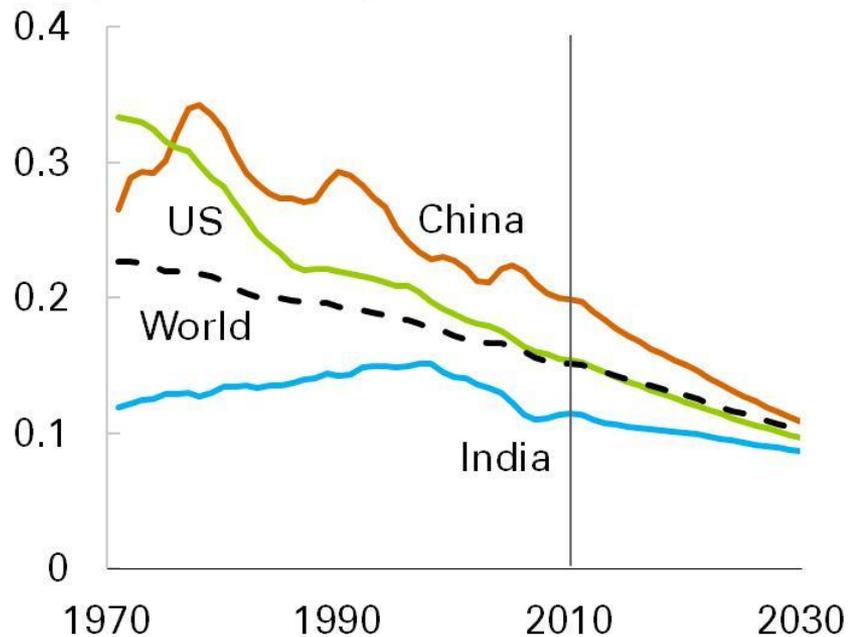
Toe per thousand \$2010 GDP



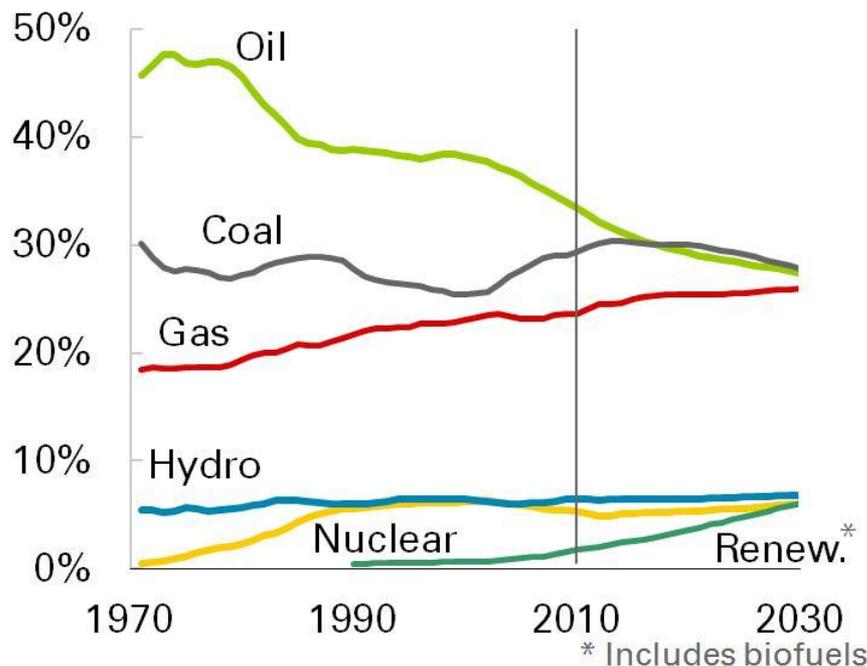
Convergence of energy intensity and fuel shares

Energy intensity

Toe per thousand \$2010 GDP



Shares of world primary energy

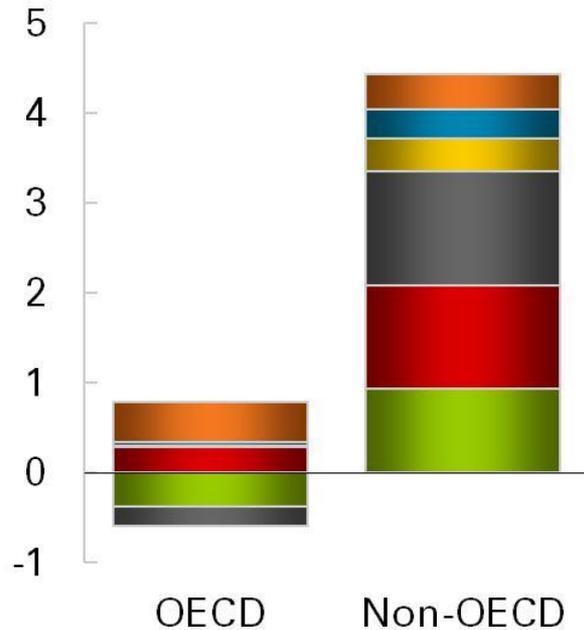


* Includes biofuels

Fuel substitution is the main story in the OECD

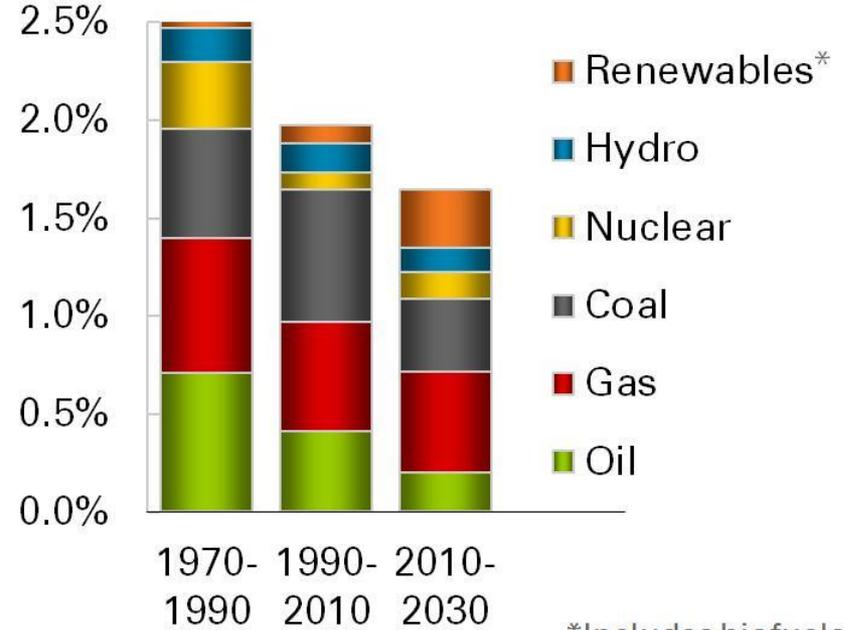
By fuel and country grouping

Change 2010 to 2030, Billion toe



Contributions to global growth

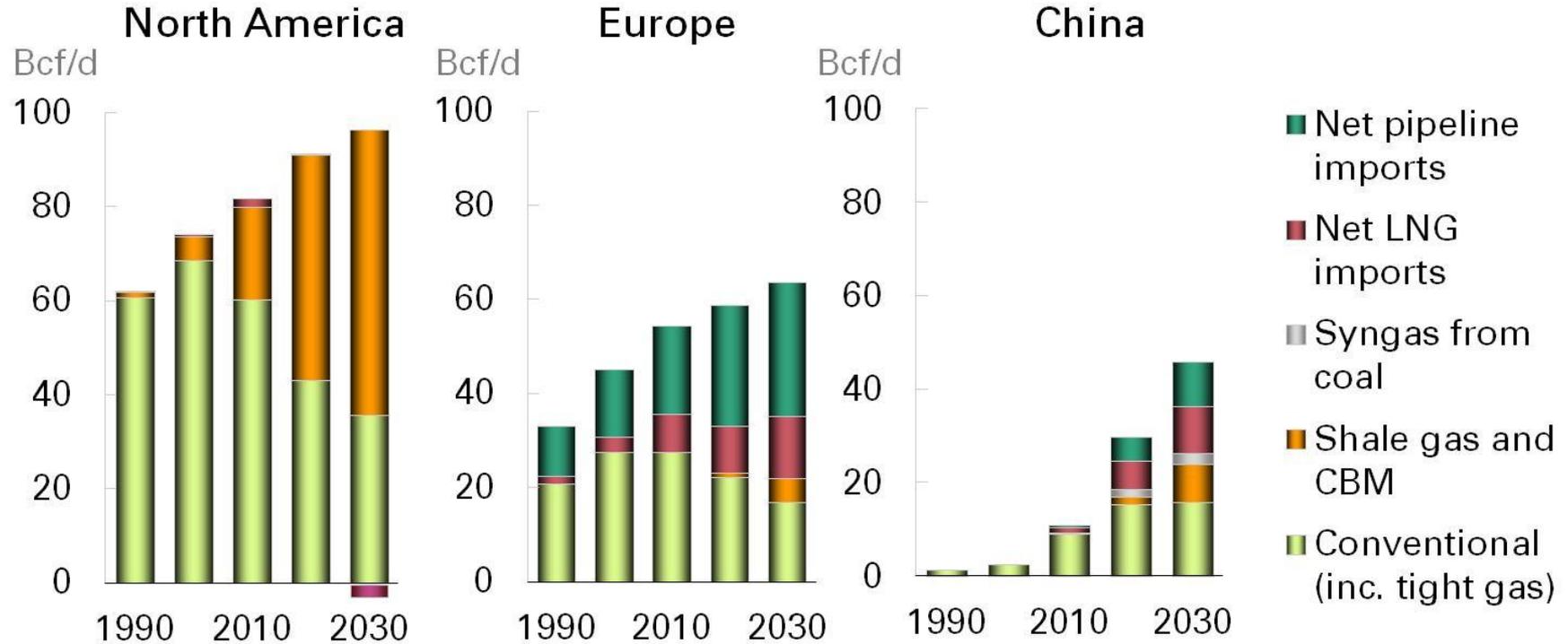
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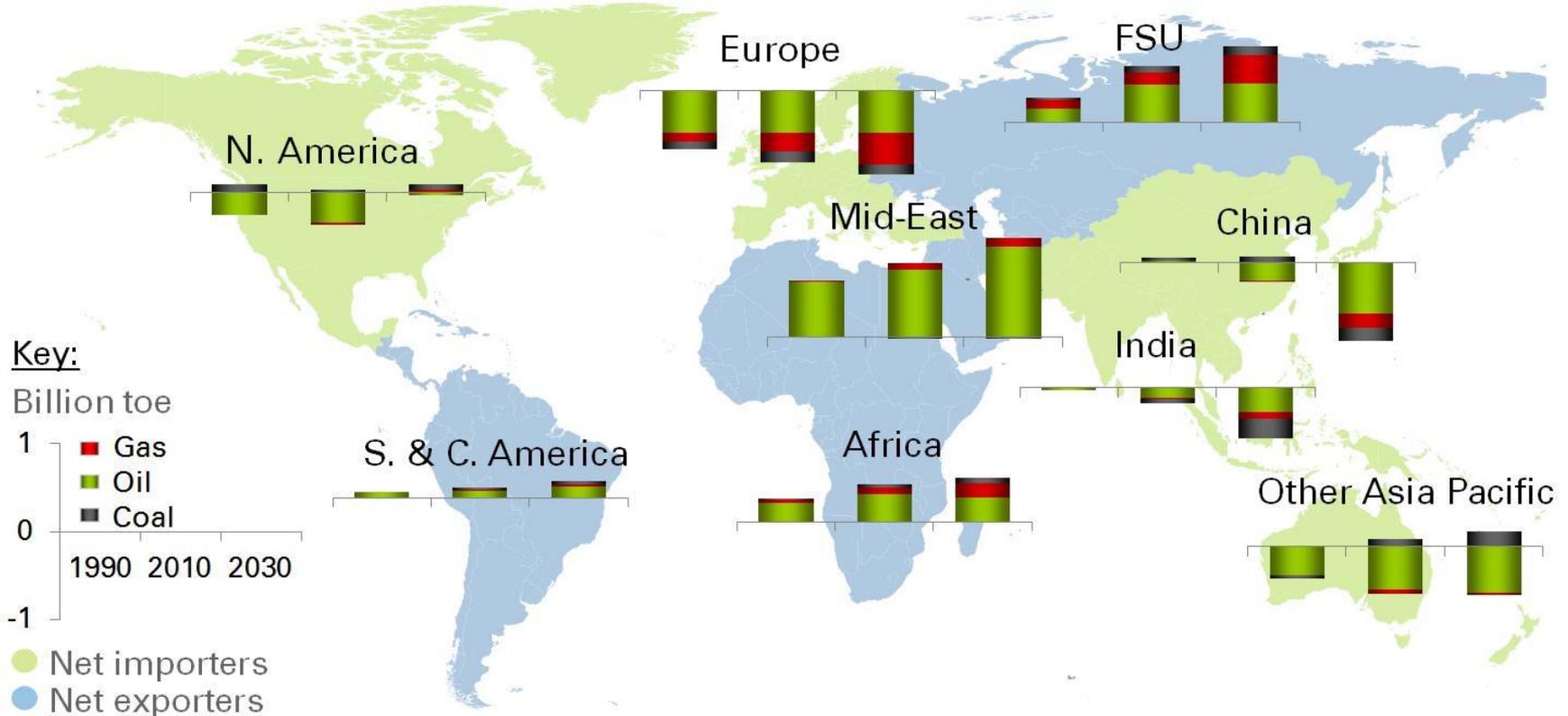
*Includes biofuels

Unconventional gas will play a growing role

Gas supply by region



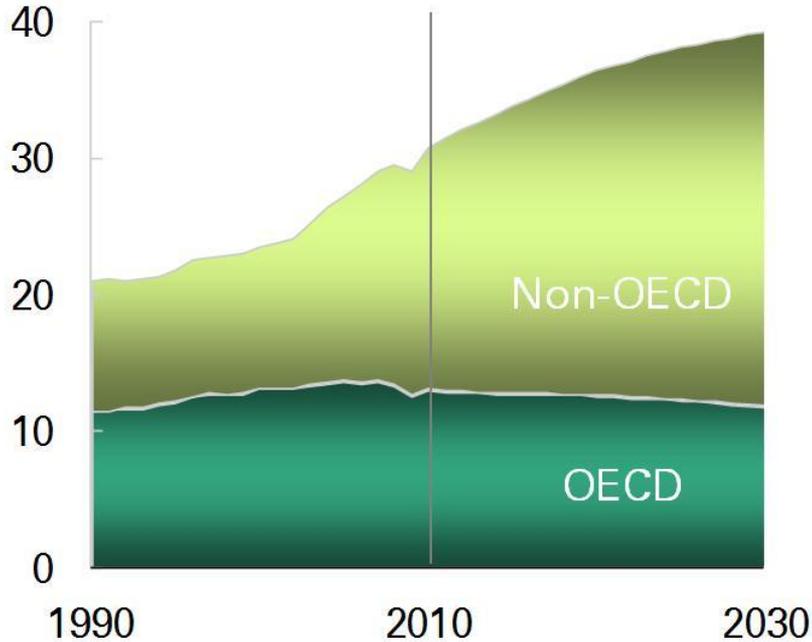
Energy imbalances improve in the Americas



Carbon emission growth slows, but more action is needed

Global CO₂ emissions from energy use

Billion tonnes CO₂



Billion tonnes CO₂

