

Strategic analysis of the future energy demand of the transportation sector to derive potential business opportunities for the oil & gas industry

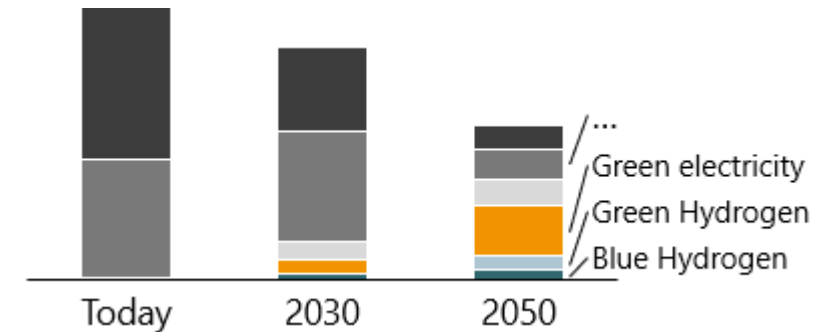
CLIENT: INDUSTRY-LED CONSORTIUM IN THE OIL & GAS INDUSTRY

BACKGROUND: The client wants to assess potential emission reduction strategies and the role of low carbon fuels for the on-road transport, maritime and aviation sector

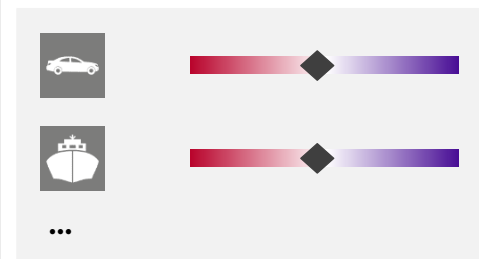
Deliverables

- ▶ Holistic assessment of energy carrier and powertrain options for the on-road, aviation and marine industry
 - Overview of the current decarbonization trends & strategies in Europe, China, USA and Japan
 - Derivation of relevant decarbonization options
- ▶ Modelling of the European transport fleet & the underlying energy demand split by energy carriers until 2050
 - Evaluation of the resulting CO₂ emissions to ensure compliance with regulatory aspects
 - Sensitivity analysis to derive key drivers and influence parameters
- ▶ Evaluation of the oil & gas industry's market position and potential steps to be well positioned to produce the required energy carriers of the future

Forecasting of transportation energy demand split by energy carriers



Evaluation of status quo of the oil & gas industry



Strategic implications to be well positioned in the future

>20 ENERGY CARRIERS FORECASTED ACROSS 3 INDUSTRIES UNTIL 2050