

The Shale Gas Market 2013-2023

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Abstracts

The shale gas industry has seen significant growth in the North American market changing the dynamics of natural gas trading in the region. The combination of horizontal drilling and hydraulic fracturing to extract gas from low permeability rock sources has presented a major new energy source, which has significantly reduced the need for natural gas imports to the US. Nations across the world are now looking at the possibility of tapping into this resource to supplement domestic gas consumption or even for export. As a consequence, visiongain has determined that the value of the global shale gas market in 2013 will reach \$33.2bn.

The shale gas market is currently dominated by the US as this is where the technology to develop shale was pioneered. The US also has a number of favourable characteristics that have helped promote the speed of shale gas production. However, this has created a distinctly two tier market between the nations with an established shale gas market, and less mature and more rapidly developing markets.

Investment in shale gas exploration outside of North America will grow strongly over the next decade while the US and Canadian markets will maintain their position as the epicentre of shale gas investment. This report provides in-depth analysis of the emerging international shale gas market and gives insights into the unique characteristics of each national market and its growth potential.

What makes this report unique?

Visiongain consulted widely with industry experts to identify key aspects and trends in the shale gas market. Capital expenditure figures were collected for all major companies in the market to create a basis for the forecast. As such, our reports have a unique blend of primary and secondary research providing informed opinion. The report provides insight into key drivers and restraints behind technological and programme

developments, as well as identifying leading companies. The report also provides a unique blend of qualitative analysis combined with extensive quantitative data including global and national markets forecasts from 2013-2023 - all highlighting key business opportunities.

Why you should buy The Shale Gas Market 2013-2023

96 tables, charts, and graphs

Global shale gas market forecasts between 2013-2023

8 leading regional shale gas market forecasts between 2013-2023

Argentina

Australia

Canada

China

India

Mexico

Poland

United States

Rest of the World

A PEST analysis of shale gas market

Identification and profiles of the 10 leading shale gas developers

Antero Resources

BHP Billiton

Chesapeake Energy

CONSOL Energy

Devon Energy

EQT Corporation

ExxonMobil

Range Resources

Royal Dutch Shell

Southwestern Energy

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Gain an understanding of how to tap into the potential of this market by ordering **The Shale Gas Market 2013-2023**

Contents

1. EXECUTIVE SUMMARY

- 1.1 Overview of the Shale Gas Market
- 1.2 Benefits of This Report
- 1.3 Who is This Report For?
- 1.4 Methodology
- 1.5 Global Shale Gas Market Forecast 2013-2023
- 1.6 Leading National Shale Gas Market Forecasts 2013-2023

2. INTRODUCTION TO THE SHALE GAS MARKET

- 2.1 Global Shale Gas Resources
- 2.2 Global Shale Gas Market Emphasis
- 2.3 Global Shale Gas Economics
- 2.4 Current Trends in the Shale Gas Market
 - 2.4.1 Natural Gas Prices
 - 2.4.2 Increasing Influence of Large Multi-National Companies
 - 2.4.3 Growing Number of Joint Ventures
 - 2.4.4 Improving Operational Efficiency
 - 2.4.5 Shift from Gas to Liquids
 - 2.4.6 Hedging not Managing to Cover Losses

3. GLOBAL SHALE GAS MARKET 2013-2023

- 3.1 Global Shale Gas Market Forecast 2013-2023
- 3.2 Global Shale Gas Market Drivers & Restraints
- 3.3 Emulating the US Shale Gas Revolution?
 - 3.3.1 Geology, Industry, Regulation, Pipelines, Water, Demand, Finance
 - 3.3.2 Shale Gas in the US-Canadian Market and the Rest of the World

4. LEADING NATIONAL SHALE GAS MARKETS 2013-2023

- 4.1 Leading National Shale Gas Markets Forecast 2013-2023
 - 4.1.1 Leading National Shale Gas Markets Share Forecast 2013, 2018, 2023
- 4.2 Global Shale Gas Market Barriers to Entry Analysis
 - 4.2.1 National Shale Gas Market Barriers to Entry Analysis
- 4.3 US Shale Gas Market Forecast 2013-2023

- 4.3.1 US Shale Gas Market Drivers & Restraints
- 4.3.2 US Shale Gas Market Analysis
- 4.4 Canadian Shale Gas Market Forecast 2013-2023
 - 4.4.1 Canadian Shale Gas Market Drivers & Restraints
 - 4.4.2 Canadian Shale Gas Market Analysis
- 4.5 Chinese Shale Gas Market Forecast 2013-2023
 - 4.5.1 Chinese Shale Gas Market Drivers & Restraints
 - 4.5.2 Chinese Shale Gas Market Analysis
- 4.6 Argentinean Shale Gas Market Forecast 2013-2023
 - 4.6.1 Argentinean Shale Gas Market Drivers & Restraints
 - 4.6.2 Argentinean Shale Gas Market Analysis
- 4.7 Australian Shale Gas Market Forecast 2013-2023
 - 4.7.1 Australian Shale Gas Market Drivers & Restraints
 - 4.7.2 Australian Shale Gas Market Analysis
- 4.8 Polish Shale Gas Market Forecast 2013-2023
 - 4.8.1 Polish Shale Gas Market Drivers & Restraints
 - 4.8.2 Polish Shale Gas Market Analysis
- 4.9 Mexican Shale Gas Market Forecast 2013-2023
 - 4.9.1 Mexican Shale Gas Market Drivers & Restraints
 - 4.9.2 Mexican Shale Gas Market Analysis
- 4.10 Indian Shale Gas Market Forecast 2013-2023
 - 4.10.1 Indian Shale Gas Market Drivers & Restraints
 - 4.10.2 Indian Shale Gas Market Analysis
- 4.11 Rest of the World Shale Gas Market Forecast 2013-2023
 - 4.11.1 Rest of the World Shale Gas Market Drivers & Restraints
 - 4.11.2 Rest of the World Shale Gas Market Analysis

5. PEST ANALYSIS OF THE SHALE GAS MARKET 2013-2023

- 5.1 Political Factors
- 5.2 Economic Factors
- 5.3 Social Factors
- 5.4 Technological Factors

6. LEADING COMPANIES IN THE SHALE GAS MARKET

- 6.1 Chesapeake Energy Company Profile
- 6.2 BHP Billiton Company Profile
- 6.3 ExxonMobil Company Profile

- 6.4 Southwestern Energy Company Profile
- 6.5 Royal Dutch Shell Company Profile
- 6.6 Antero Resources Company Profile
- 6.7 Range Resources Company Profile
- 6.8 Devon Energy Company Profile
- 6.9 CONSOL Energy Company Profile
- 6.10 EQT Corporation Company Profile
- 6.11 Other Leading Companies in the Shale Gas Market

7. CONCLUSIONS

- 7.1 Shale Gas Market Outlook
- 7.2 Shale Gas Market Drivers & Restraints
 - 7.2.1 Shale Gas Market Drivers
 - 7.2.2 Shale Gas Market Restraints
- 7.3 Leading National Shale Gas Market Forecasts 2013-2023

8. GLOSSARY

List Of Tables

LIST OF TABLES

Table 1.1 Leading National Shale Gas Market Forecasts Summary 2013, 2018, 2023 (\$m, CAGR %)

Table 3.1 Global Shale Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 3.2 Global Shale Gas Market Drivers & Restraints

Table 3.3 Important Global Shale Gas Market Factors (Geology, Industry, Regulation, Demand, Finance, Water, Pipelines)

Table 4.1 Leading National Shale Gas Markets Forecast 2013-2023 (\$m, AGR %)

Table 4.2 Leading National Shale Gas Market CAGRs 2013-2018, 2018-2023, 2013-2023 (CAGR %)

Table 4.3 Leading National Shale Gas Markets Cumulative Capital Expenditure 2013-2023 (Rank, \$bn)

Table 4.4 US Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.5 US Shale Gas Market Drivers & Restraints

Table 4.6 Canadian Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.7 Canadian Shale Gas Market Drivers & Restraints

Table 4.8 Chinese Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.9 Chinese Shale Gas Market Drivers & Restraints

Table 4.10 Major International & Domestic Shale Gas Companies Operating in China

Table 4.11 Argentinean Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.12 Argentinean Shale Gas Market Drivers & Restraints

Table 4.13 Major International & Domestic Shale Gas Companies Operating in Argentina

Table 4.14 Australian Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.15 Australian Shale Gas Market Drivers & Restraints

Table 4.16 Major International & Domestic Shale Gas Companies Operating in Australia

Table 4.17 Polish Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.18 Polish Shale Gas Market Drivers & Restraints

Table 4.19 Major International & Domestic Shale Gas Companies Operating in Poland

Table 4.20 Mexican Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.21 Mexican Shale Gas Market Drivers & Restraints

Table 4.22 Indian Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.23 Indian Shale Gas Market Drivers & Restraints

Table 4.24 Major International & Domestic Shale Gas Companies Operating in India

Table 4.25 Rest of the World Shale Gas Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 4.26 Rest of the World Shale Gas Market Drivers & Restraints

Table 4.27 Major International & Domestic Shale Gas Companies Operating in the Rest of the World

Table 5.1 PEST Analysis of the Shale Gas Market 2013-2023

Table 6.1 Leading 10 Companies in the Shale Gas Market 2013 (Shale Gas Capex, Market Share %)

Table 6.2 Chesapeake Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Ticker, Website)

Table 6.3 BHP Billiton Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Ticker, Website)

Table 6.4 BHP Billiton Shale Gas Acreage (acres)

Table 6.5 ExxonMobil Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Ticker, Website)

Table 6.6 ExxonMobil North American Shale Gas Acreage (acres)

Table 6.7 Southwestern Energy Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Ticker, Website)

Table 6.8 Royal Dutch Shell Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Ticker, Website)

Table 6.9 Shell Shale Gas Acreage (acres)

Table 6.10 Antero Resources Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Website)

Table 6.11 Range Resources Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Website)

Table 6.12 Devon Energy Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Website)

Table 6.13 Devon Energy's Shale Gas Acreage (acres)

Table 6.14 CONSOL Energy Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Website)

Table 6.15 EQT Corporation Overview (Shale Gas Capex \$m, Global Market Share %, Net Income \$m, Debt \$bn, HQ, Website)

Table 6.16 Other Leading Companies in the Shale Gas Market 2013 (Company, Country)

Table 7.1 Leading National Shale Gas Market Forecasts Summary 2013, 2018, 2023 (\$m), 2013-2023 CAGR (%)

About

Natural Gas Prices

Natural gas prices in North America, where all commercial shale gas production currently resides, are slowly recovering from a ten year low. The low gas price of the last two years has been inhibiting development of a number of shale gas plays as it has dipped under the break even point of the dry gas plays. The substantial drop in the natural gas price throughout the second half of 2011 and the first half of 2012 has made a number of dry gas developments uneconomical, and a number of companies have suspended or slowed drilling operations. In the majority of cases, the shale gas industry will need gas prices of over \$4.50MMbtu in order to break even on dry gas plays. The EIA's latest short term gas price forecast does not envisage this to happen in the next 18 months if the traditional rise in prices during the winter season is discounted.

There is however some positive news with many market indicators pointing towards a rise in the price of natural gas. Firstly, the main cause of the low gas price is related to the glut of the resource in the US and its lack of ability to export excess gas. Typical production decline from new wells can be as much as 60% from the first year, so if there is a significant curbing of drilling it shouldn't take too long for supply and demand to balance. That being said natural gas storage levels remain close to capacity and releasing some of this gas will slow the process somewhat.

Chesapeake Energy Company Profile

Chesapeake is the number two gas producing company in the US, only surpassed by the largest oil and gas company in the world, ExxonMobil. In 2012 the company produced 1.1tcf, had 196tcf of proved reserves and was one of the largest shale gas developers in the world with over 3.6 million net shale acres in its North American gas portfolio and a total of 14 million net acres of exploration and production leasehold in the United States. Chesapeake is partnered with Statoil (32.5%) in its Marcellus holdings, Plains Exploration & Production Company (20%) in Haynesville, Total (25%) in Barnett and CNOOC (33.3%) in Pearsall and Eagle Ford. In 2012, Total purchased a 25% stake in 619,000 acres of Chesapeake's Utica Shale.

Due to its problematic financial situation which saw the company facing a \$10bn funding gap Chesapeake has been selling of parts of its North American assets over the past year. In 2012 the company sold assets worth \$6.9bn, including the sale of most of its

assets in the Permian Basin to Royal Dutch Shell Plc and Chevron Corp as well as nearly all of its infrastructure network in the region. The company still faces a funding gap of around \$3.5bn for 2013 and has continued to sell off E&P acreage and midstream assets to raise a total \$7bn this year. In the first quarter of 2013 alone Chesapeake sold assets worth \$2.3bn. Among the deals in 2013 were several involving high quality shale gas acreage. In April 2013, Southwestern Energy agreed to acquire approximately 162,000 net acres of leasehold in Northeast Pennsylvania prospective for the Marcellus Shale from Chesapeake and Statoil for approximately \$93 million. The acreage is located in Susquehanna, Wyoming, Tioga and Sullivan counties.

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