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# 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

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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.

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96 tables, charts, and graphs

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8 leading regional shale gas market forecasts between 2013-2023
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- India
- Mexico
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A PEST analysis of shale gas market

Identification and profiles of the 10 leading shale gas developers
- Antero Resources
- BHP Billiton
- Chesapeake Energy

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CONSOL Energy

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Range Resources

Royal Dutch Shell

Southwestern Energy

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# 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

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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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