Emerging opportunities in sustainable mobility

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OH SHUT UP!
Three Hard Truths

• Energy demand is surging
• Supply is struggling to keep up
• Environmental stresses are increasing
Shell energy scenarios help us to imagine alternative futures

A world of energy security and reactive change

A world of emerging coalitions and accelerated change
Potential implications for mobility

- Gas prices drive vehicle fuel economy
- Growth in ‘home grown’ biofuels
- Ad-hoc measures to pollution, congestion
- By 2050, “sustainable” mobility depends on efficient ICEs

Timing and mix are key uncertainties

Source: Shell energy scenarios: Shell International BV and Energy Balances of OECD and Non-OECD Countries©OECD/IEA 2006

Scramble

Final energy consumption EJ per year

- Liquid fuels fossil-derived
- Electricity (incl. hydrogen vehicles)
- Gaseous hydrocarbon fuels
- Biofuels

2000 2025 2050

Final energy consumption EJ per year

2000 2025 2050

Blueprints

By 2050, transport runs on lower carbon liquids and electricity

- Mobility planning in urban design, rapid transport systems, partnerships
- Significant increases in efficiency
- Electric vehicles challenge ICEs

By 2050, “sustainable” mobility depends on efficient ICEs
How sustainable transportation means business for Shell

- Improving local air quality
- Tackling CO2 emissions and improving efficiency
- Engagement, partnerships, advocacy
Growth in biofuels

• With or without mandates, biofuels are going to be needed in the future fuel mix

• Therefore we need to:
  manage the sustainability issues of today’s biofuels
  and
  invest in next generation biofuels that avoid some of the pitfalls

We’re working with our suppliers to include sustainability clauses in contracts and championing international standards

We are aggressively pursuing next generation technologies

Because next generation will take 5-10 years before volumes make an impact, we need to do both
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