

# Crónica de una Transición Anunciada:

La evolución del sector energético en el  
largo plazo y los retos de la transición

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**GASNOVA**  
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# Cómo vamos a cubrir el tema...

## Contexto actual y de corto plazo



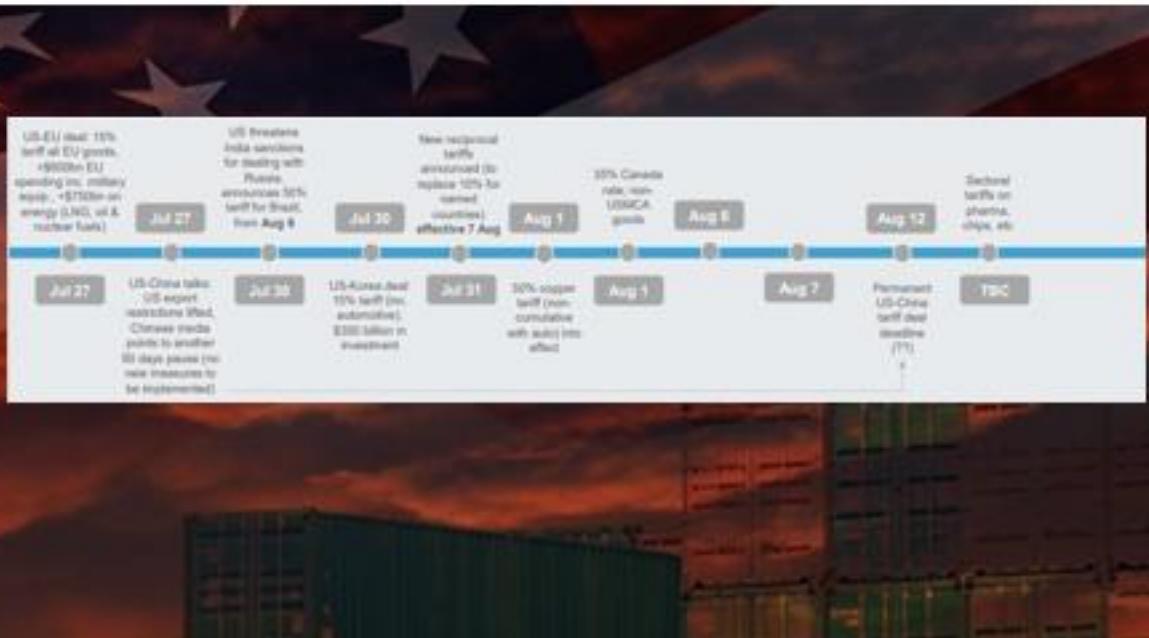
## Pronósticos de largo plazo en el sector energético



## Perspectiva, implicaciones, oportunidades



# El largo y sinuoso camino – aranceles en 2025



1950 - 2019



2020 - 2024



2025



En resumen:

## Geopolítico



## Tecnológico

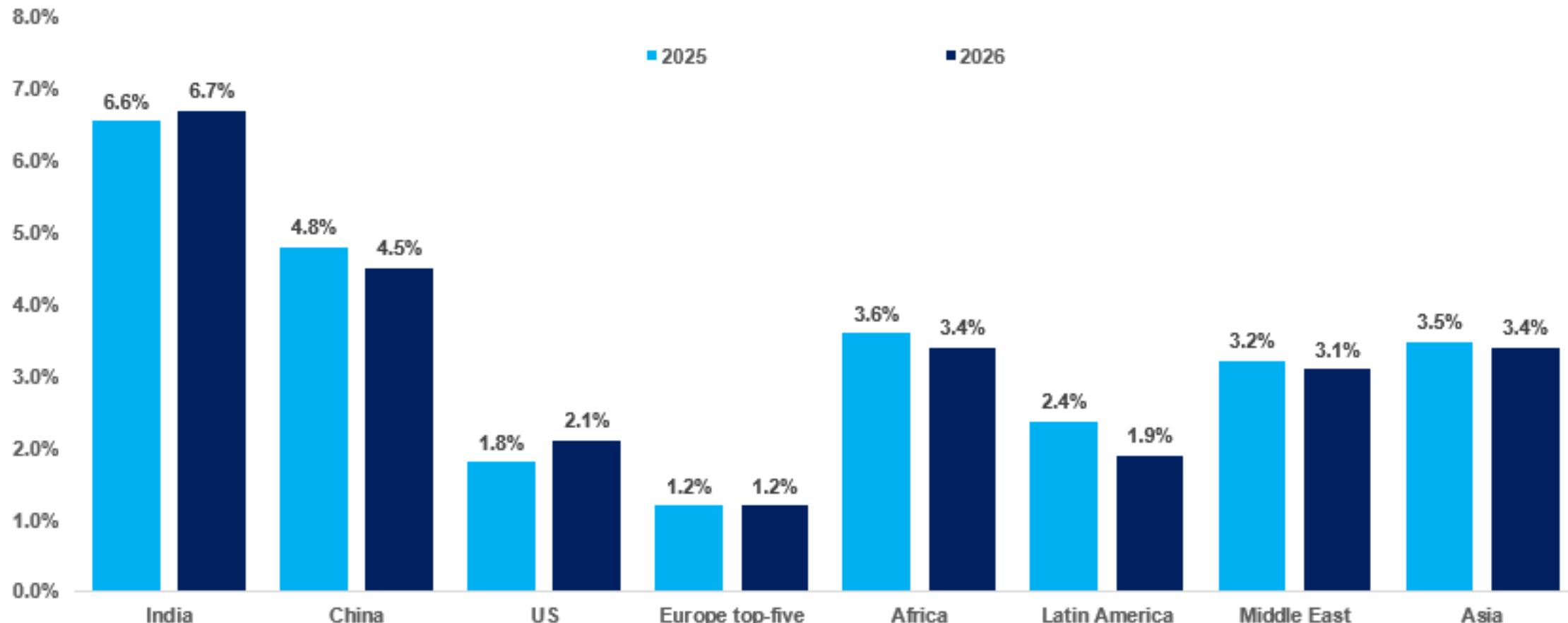


## Comercial



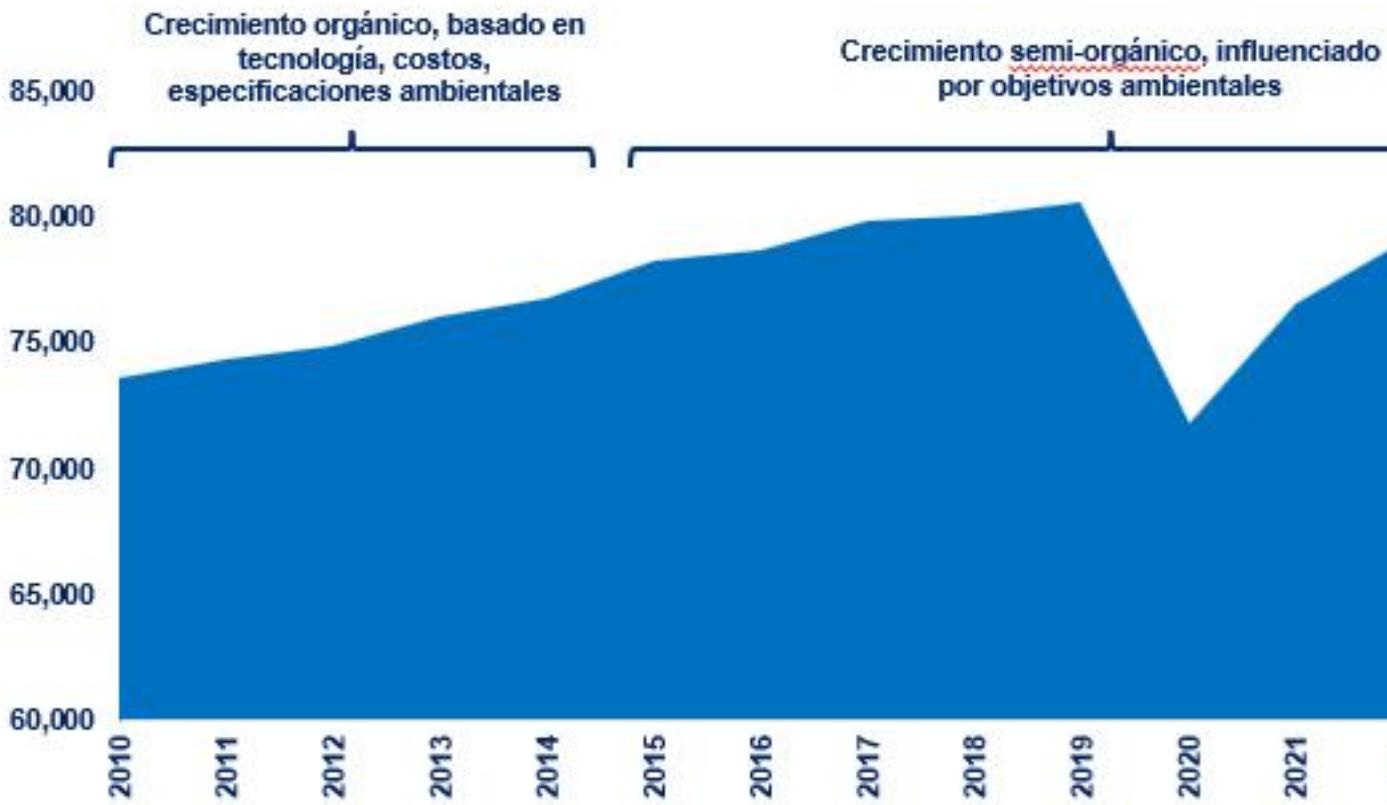
**Todos estos planes han forzado al mundo a realinearse, forjar nuevas alianzas y penetrar mercados alternos**

## Diverging Economic Growth for a Challenging Period

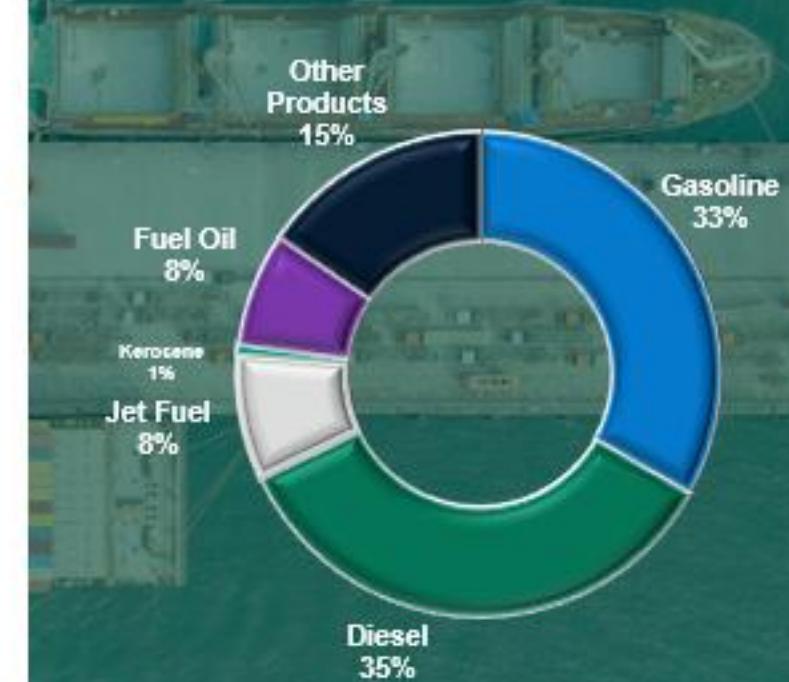


## Demand for Traditional Products - history

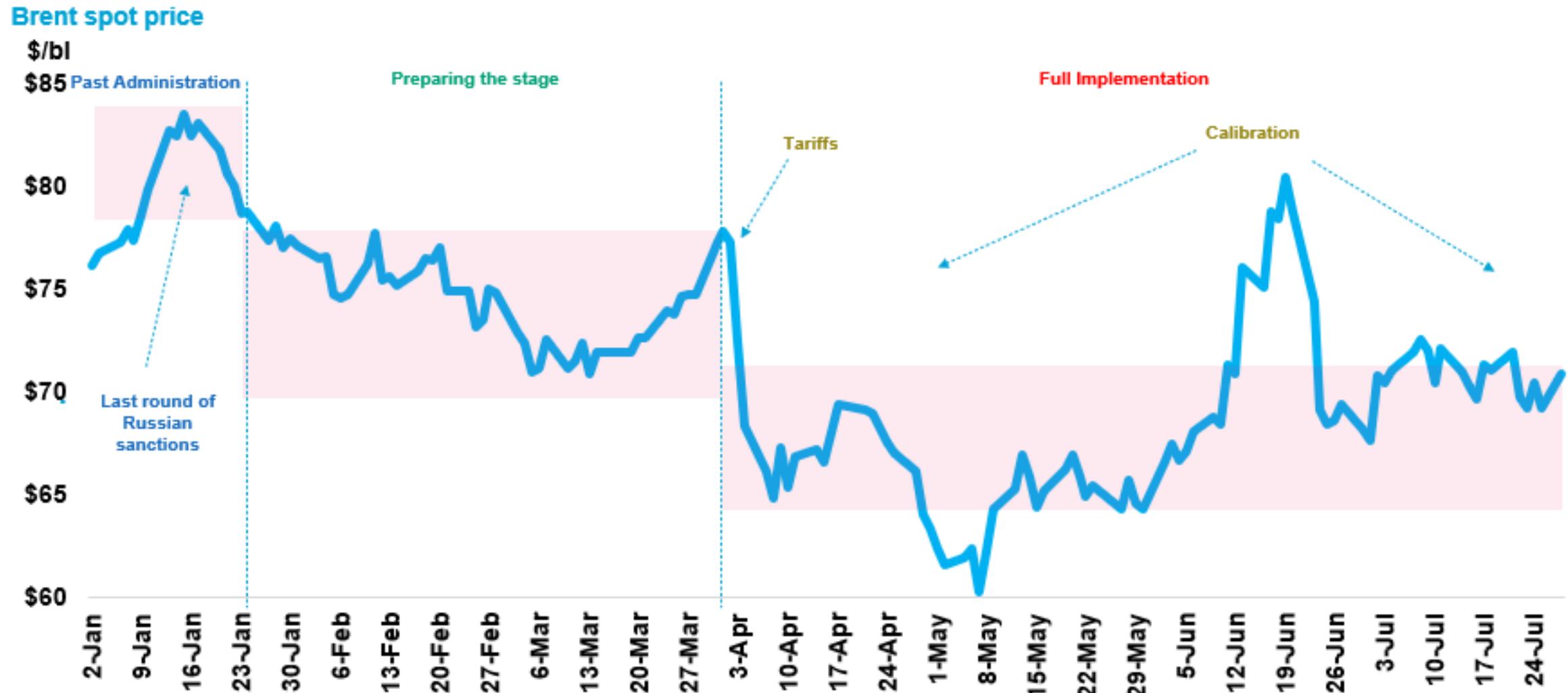
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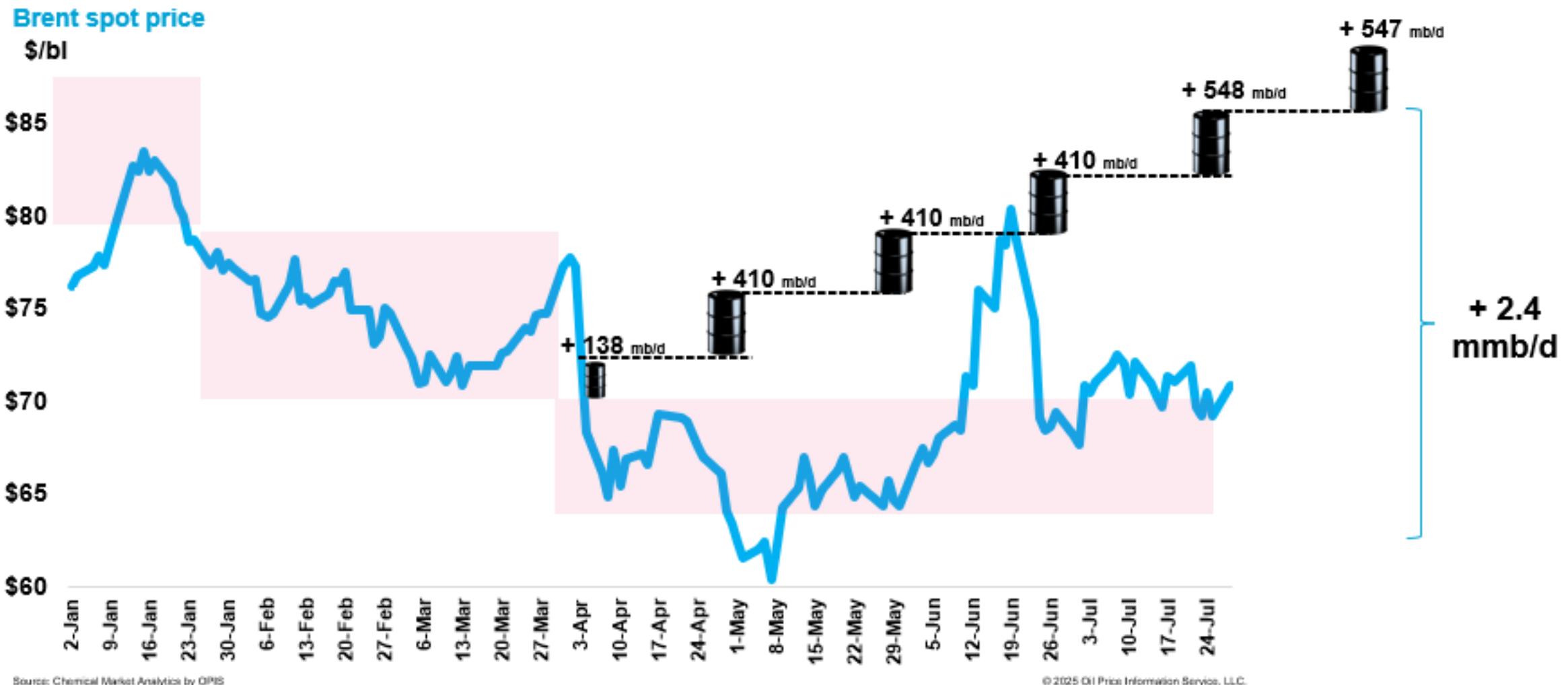
## Fuels Demand Contribution - 2024



# El precio marcador del crudo se ha movido en tres rangos este año



# La OPEP ya recuperó poco a poco su participación de mercado



# Como pinta la evolución del sector energético

## El contexto económico, social, geopolítico y comercial

### Nuevo orden mundial

2030



Mundo Globalizado



Mundo disfuncional



### Recuperando Crecimiento

2040



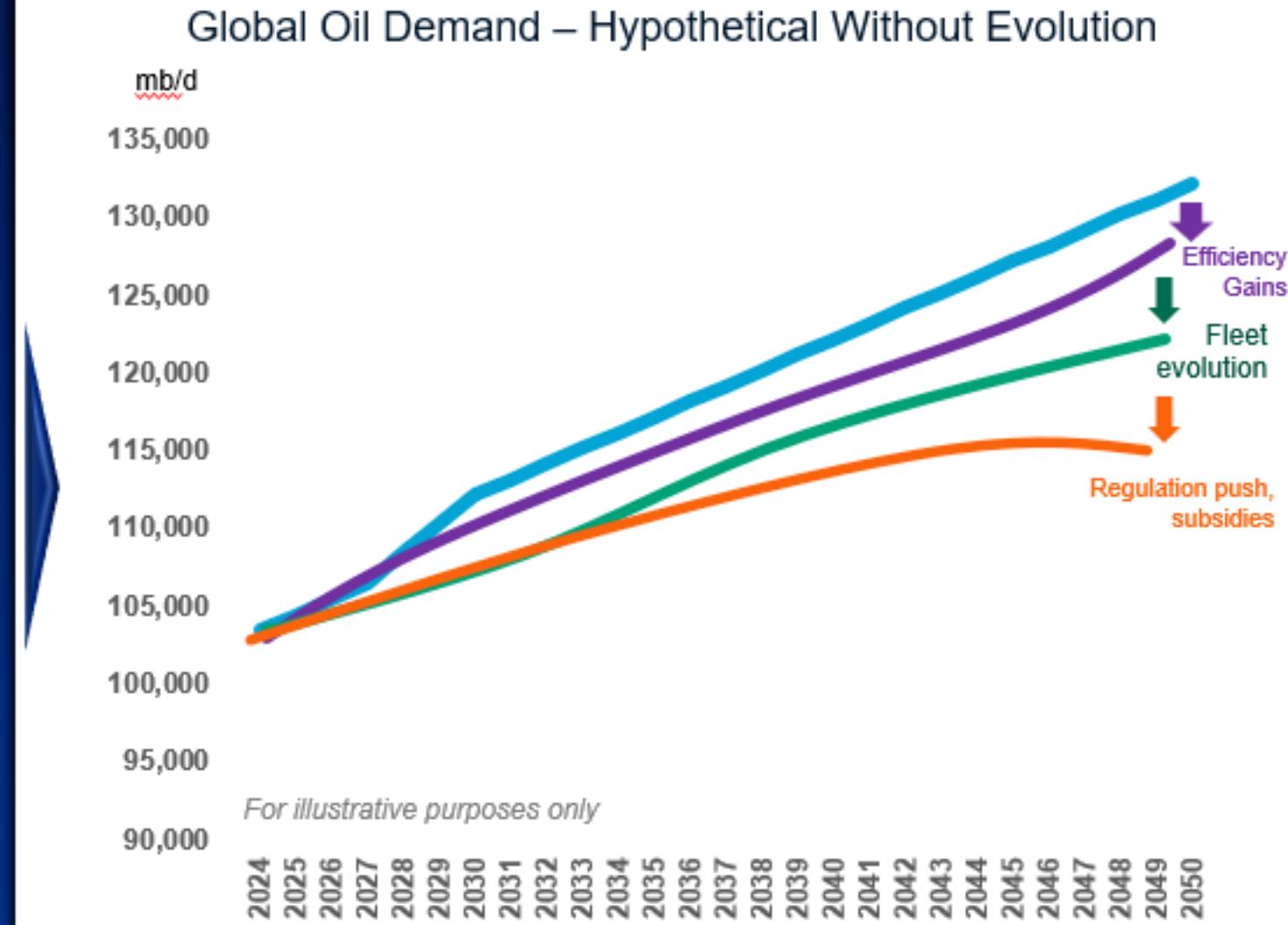
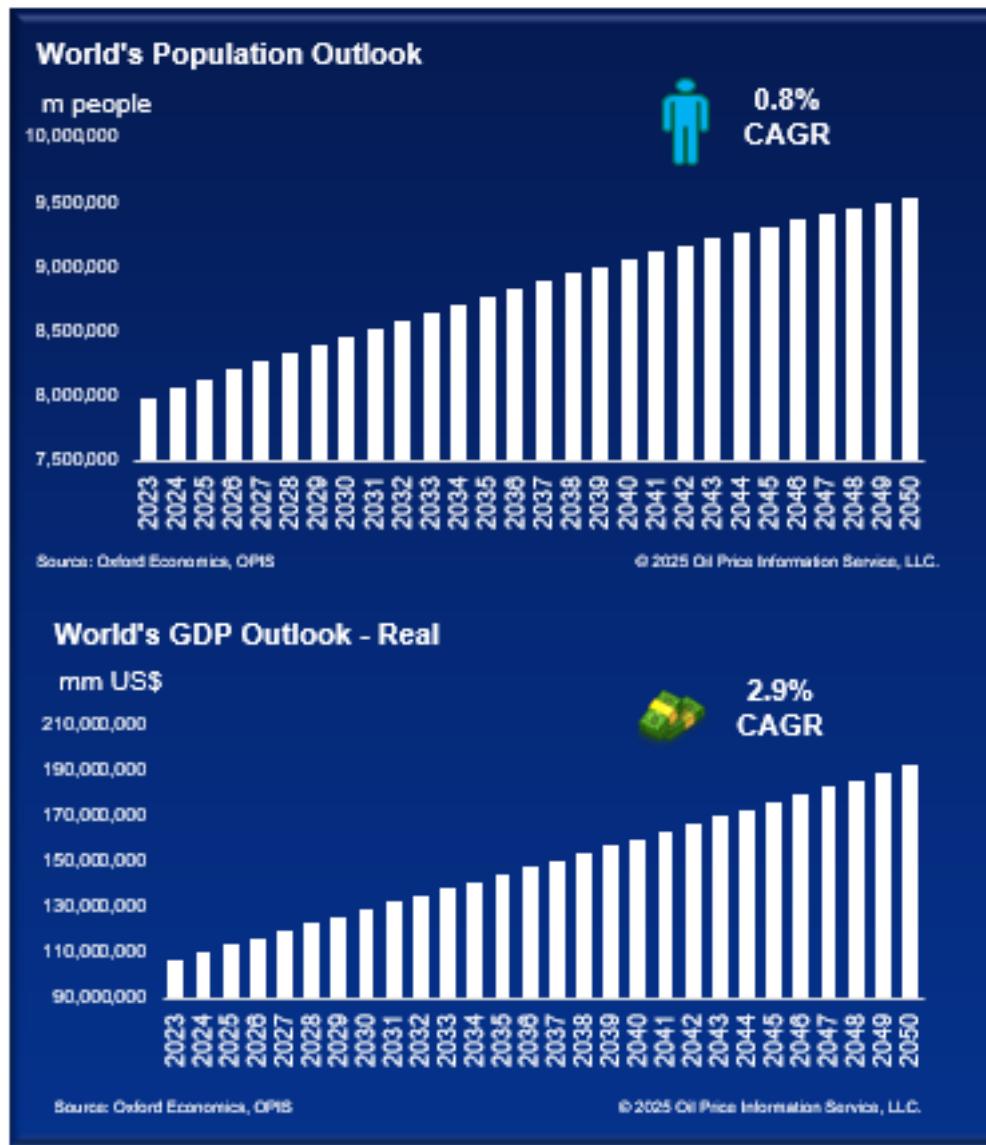
Normalización de  
comercio internacional  
y crecimiento  
económico

### Evolución de energía

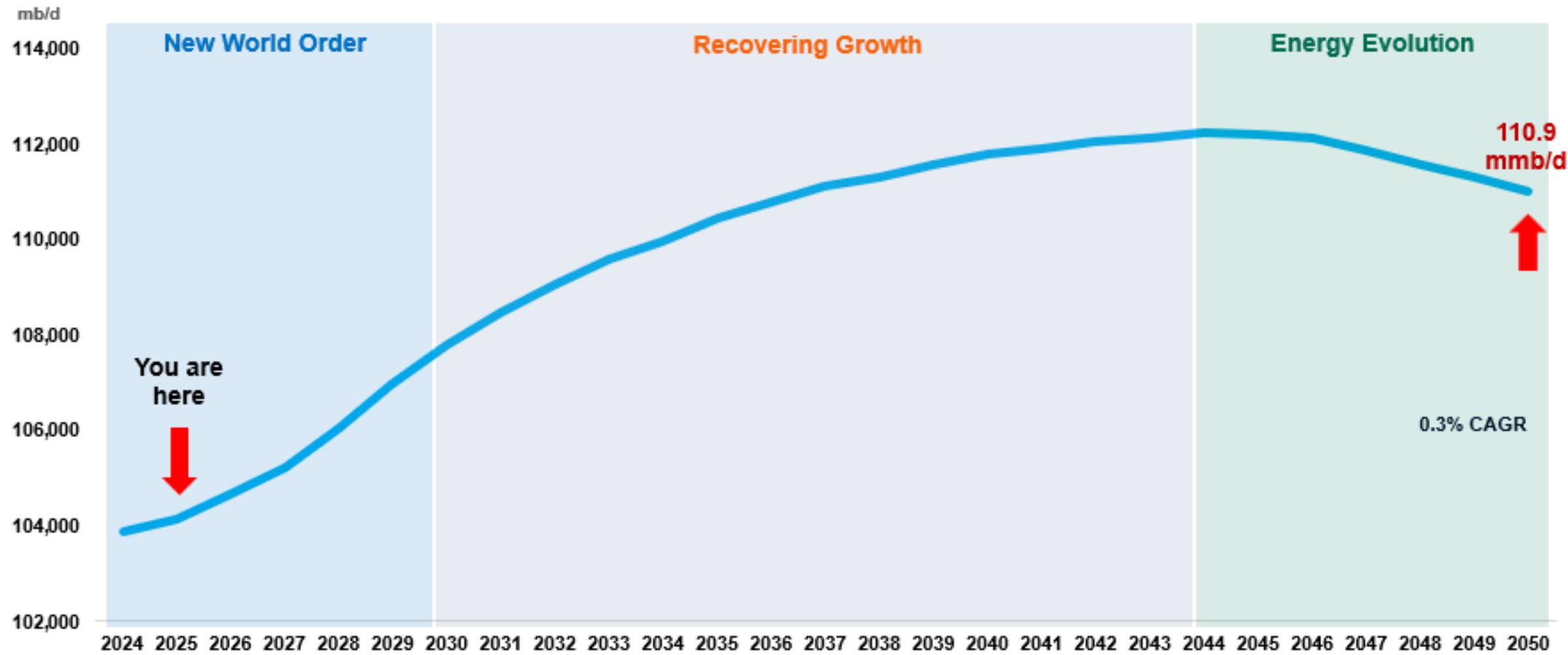


Coexistencia de  
combustibles

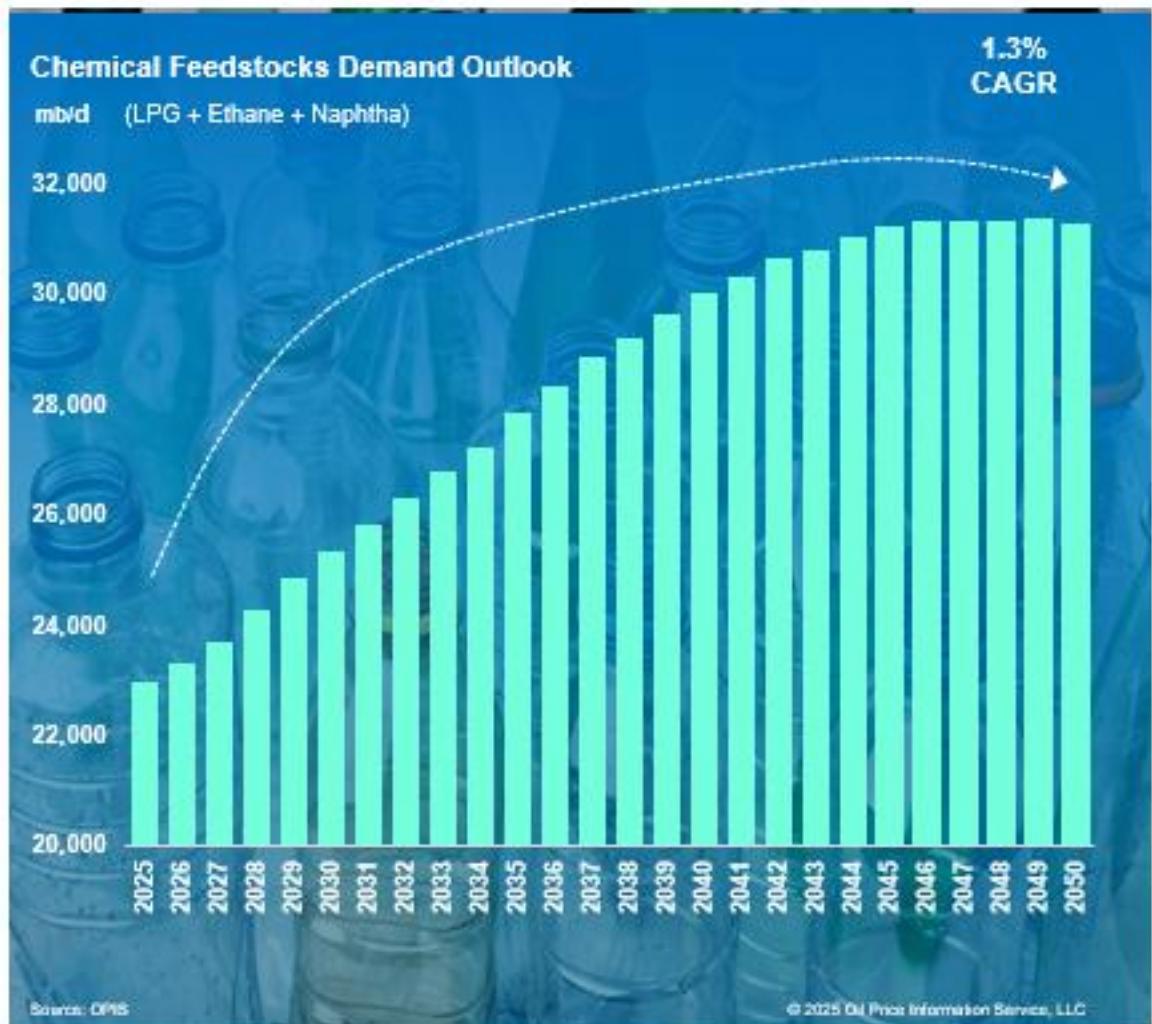
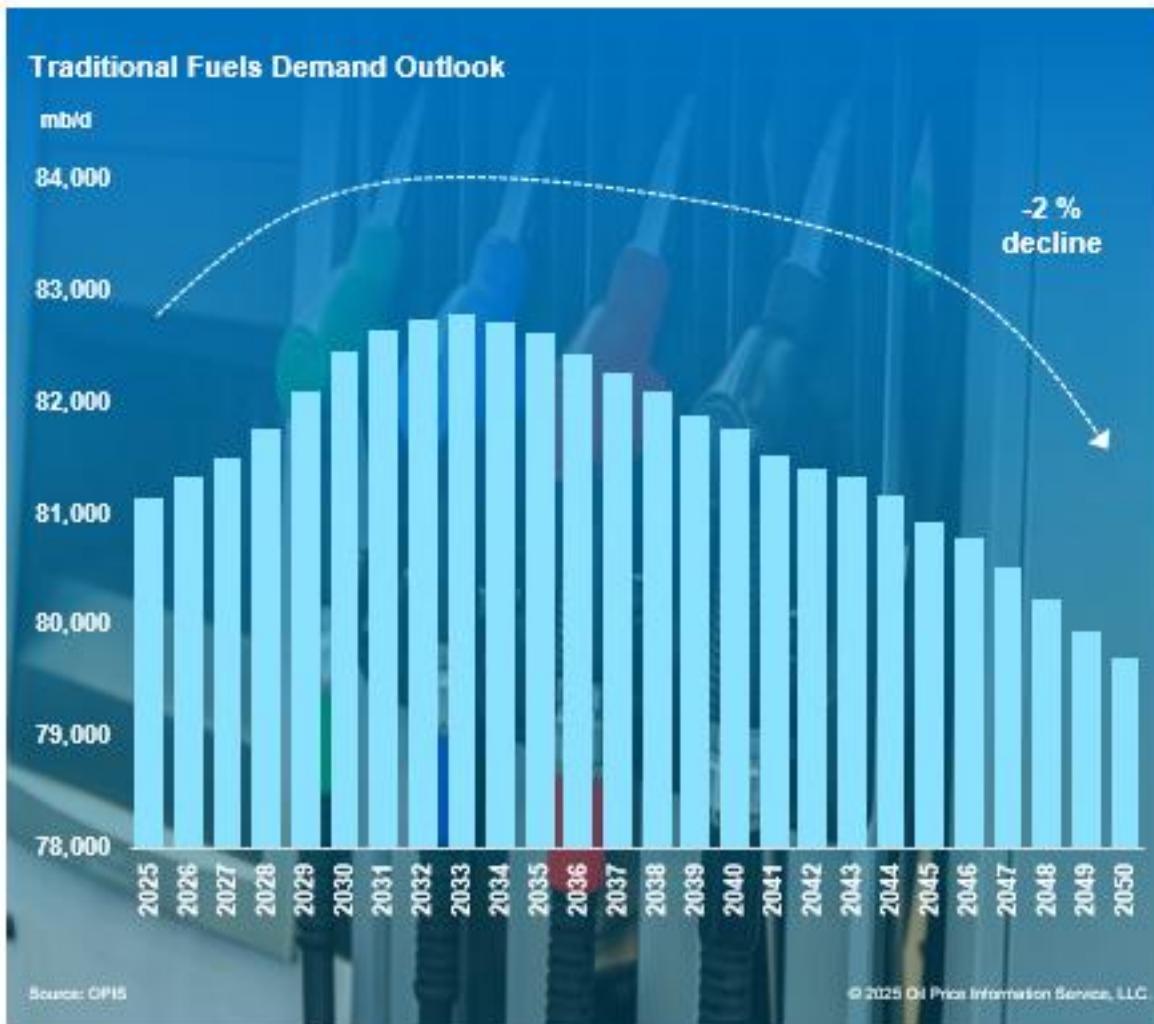
# Los dos pilares en el crecimiento de la demanda de energéticos



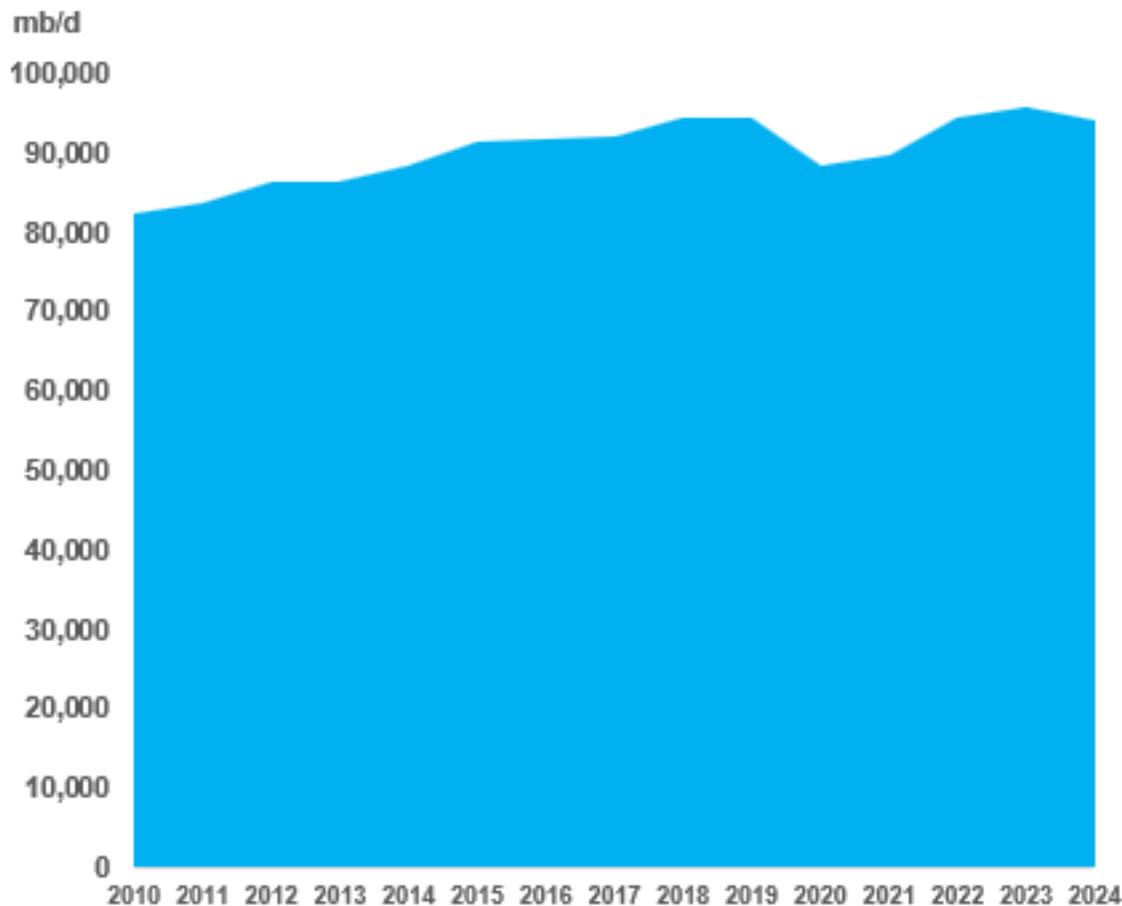
### Global Refined Products Demand



# Una demanda divergente: los combustibles tradicionales vs. demanda petroquímica se moverá en diferentes direcciones

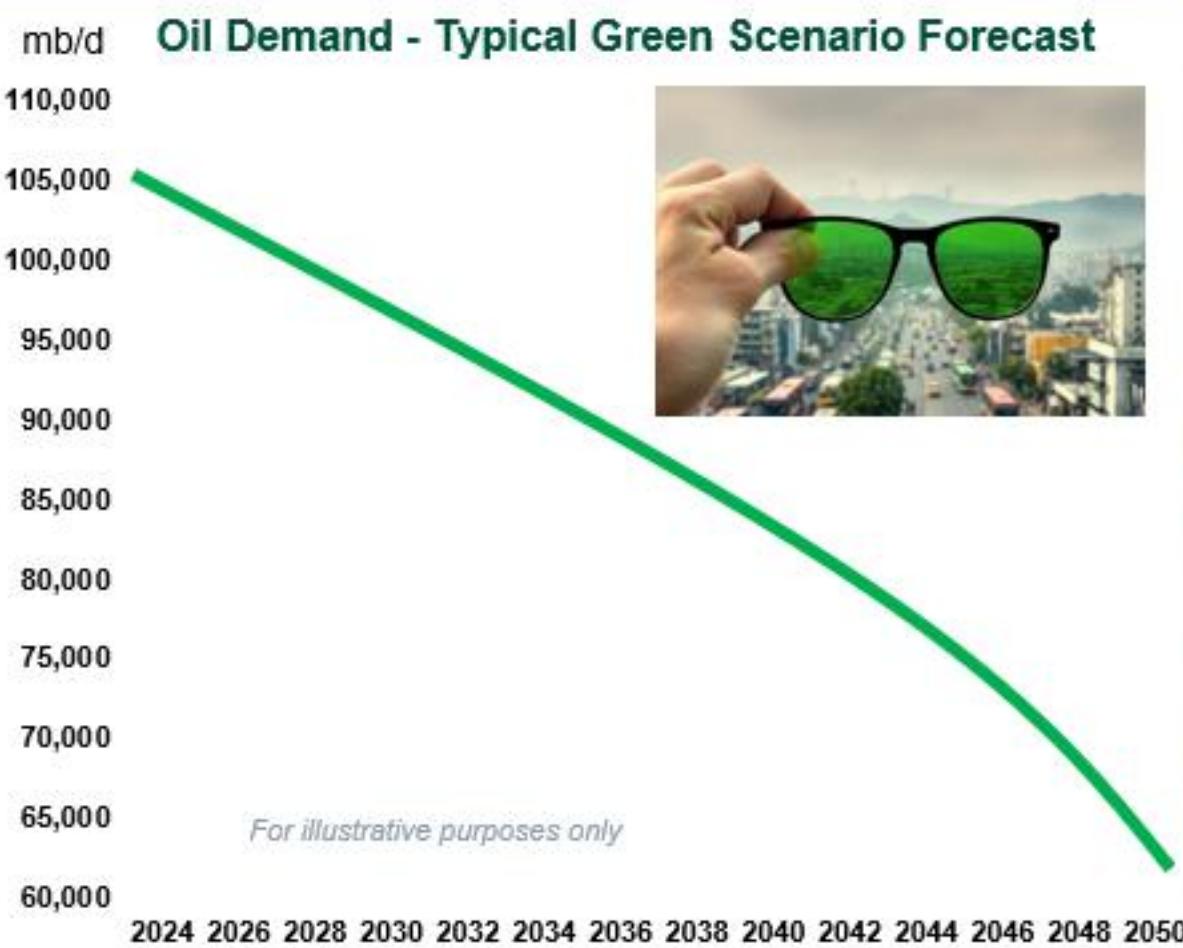


## Global liquids production (Crude + Condensates + NGLs)



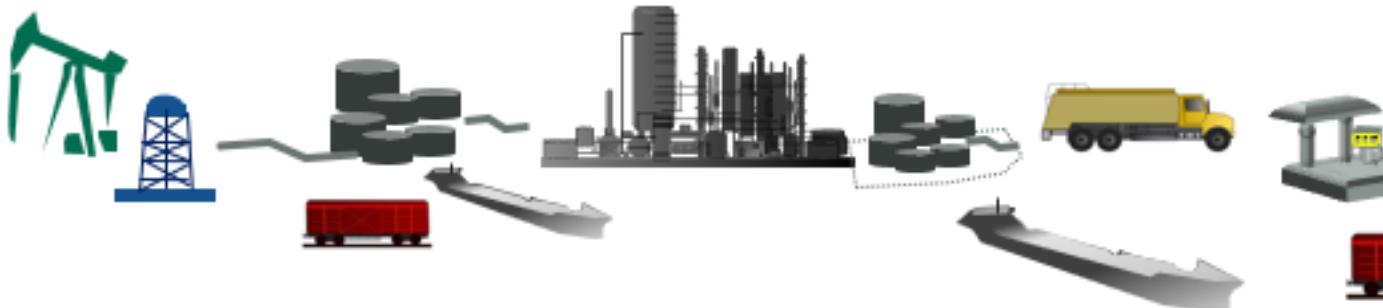
## Global biofuels supply



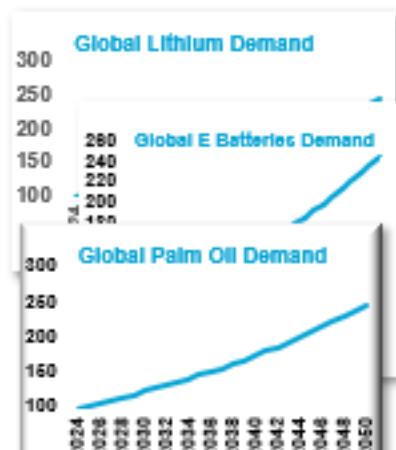
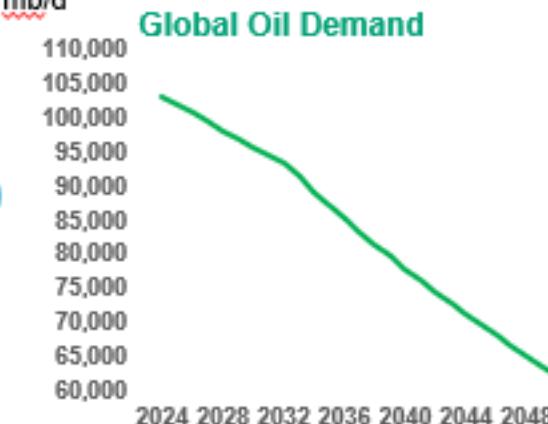


## Cadena de Suministro simplificada en el sector de crudo y gas

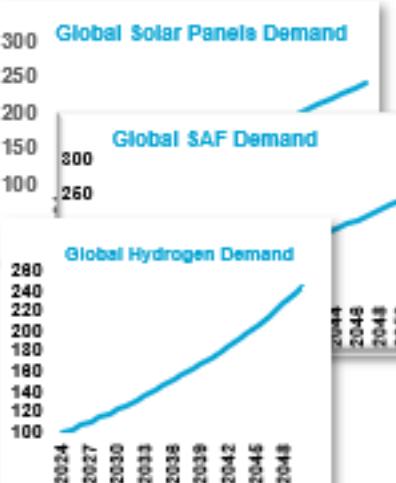
1)



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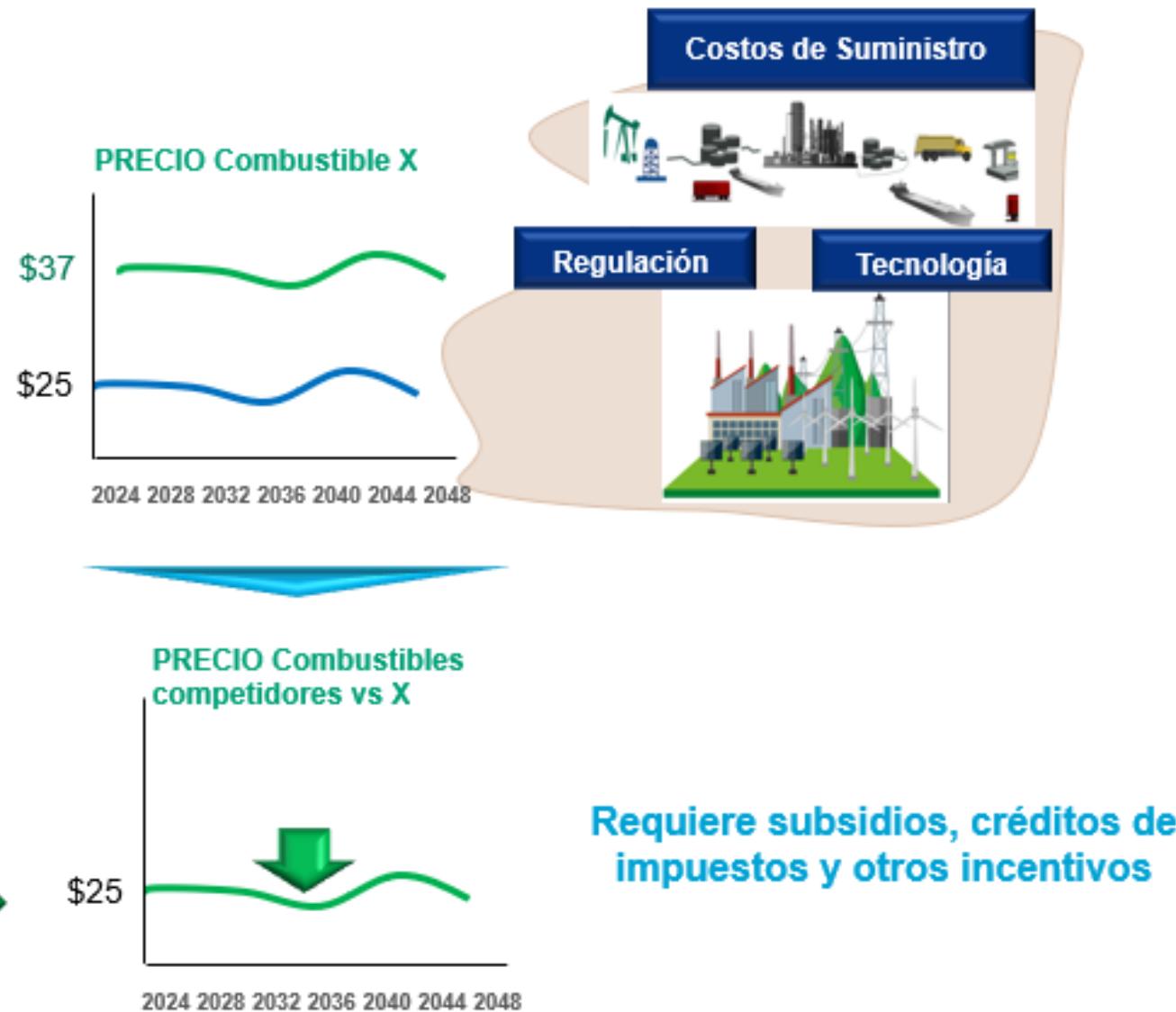
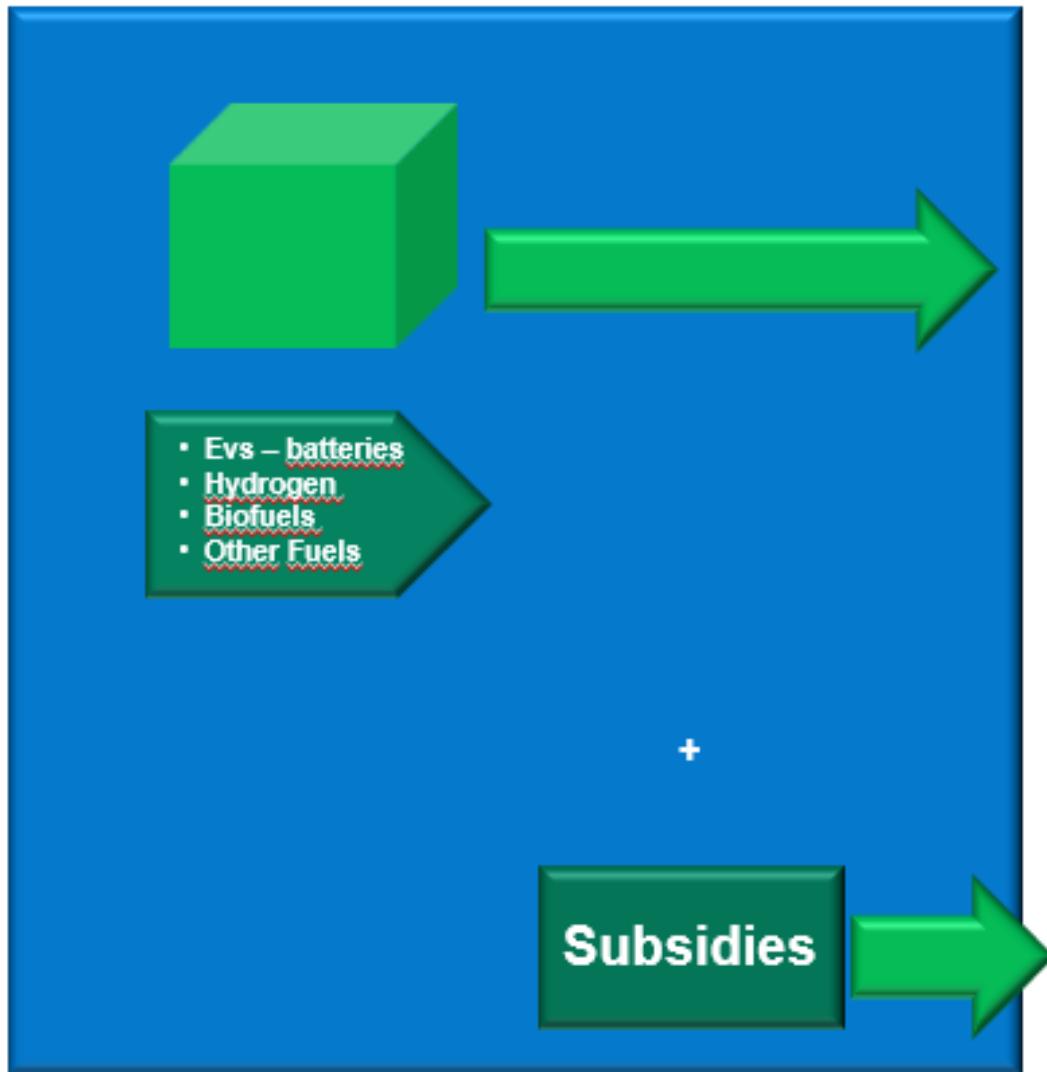
For illustrative purposes only

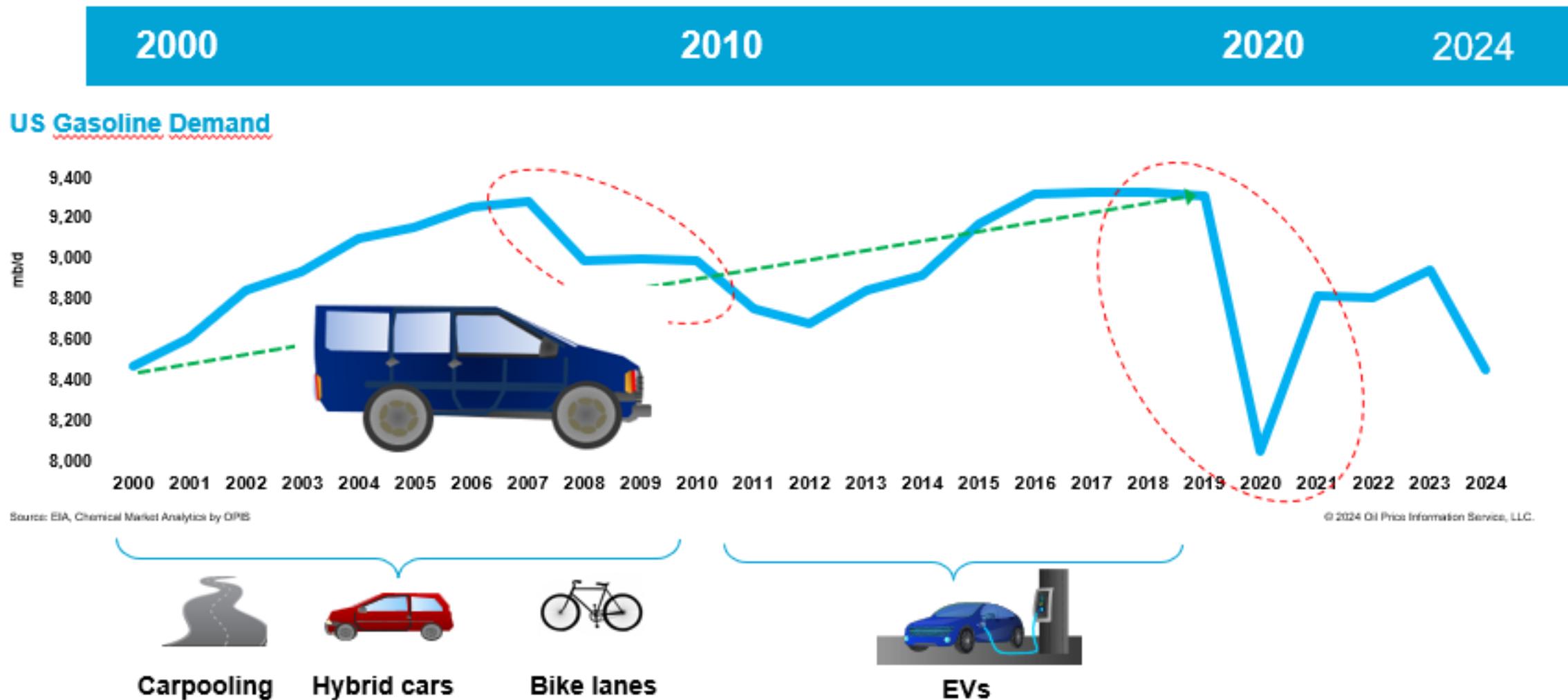


- Fragmentación de liquidez
- Comercio limitado
- Mas concentración de productores, traders

Mas volatilidad de precios

# El progreso de los combustibles alternos no ha sido orgánico (en la mayoría de los casos)





**Gasolina**

**Gradual penetración de combustibles alternos  
Robusta demanda en economías en desarrollo**



**Diesel**

**Ligado a desarrollo económico  
Sustitución es menos rápida debido a carga y rango**



**Jet fuel**

**Crecimiento significativo por nuevas rutas  
Sustitución diversa dependiendo del país**



**Fuel Oil**

**Uso de combustibles alternos será divergente  
Requerirá grandes inversiones públicas**





- **Priorizar inversión en producción (*Upstream*)**
- **Invertir en almacenamiento**
- **Firmar alianzas para construir logística**
- **Alianza comercial para cubrir mas mercados al explotar sinergias**
- **Expandir cobertura en otros mercados (Asia, Europa)**
- **Incrementar inversión en un tipo de combustible**
- **Aprovechar racionalización de otras empresas competidoras**
- **Agregar mas servicios a terminales actuales**

**Requisito: Acceso a buenas fuentes de análisis de inteligencia de mercado, pronósticos y estrategia**



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