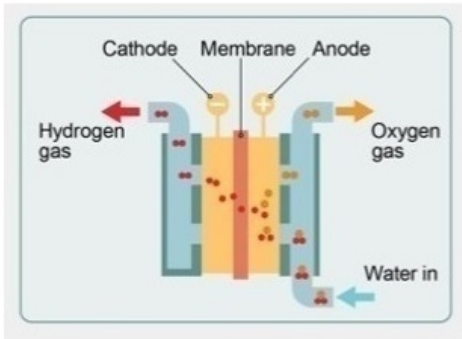


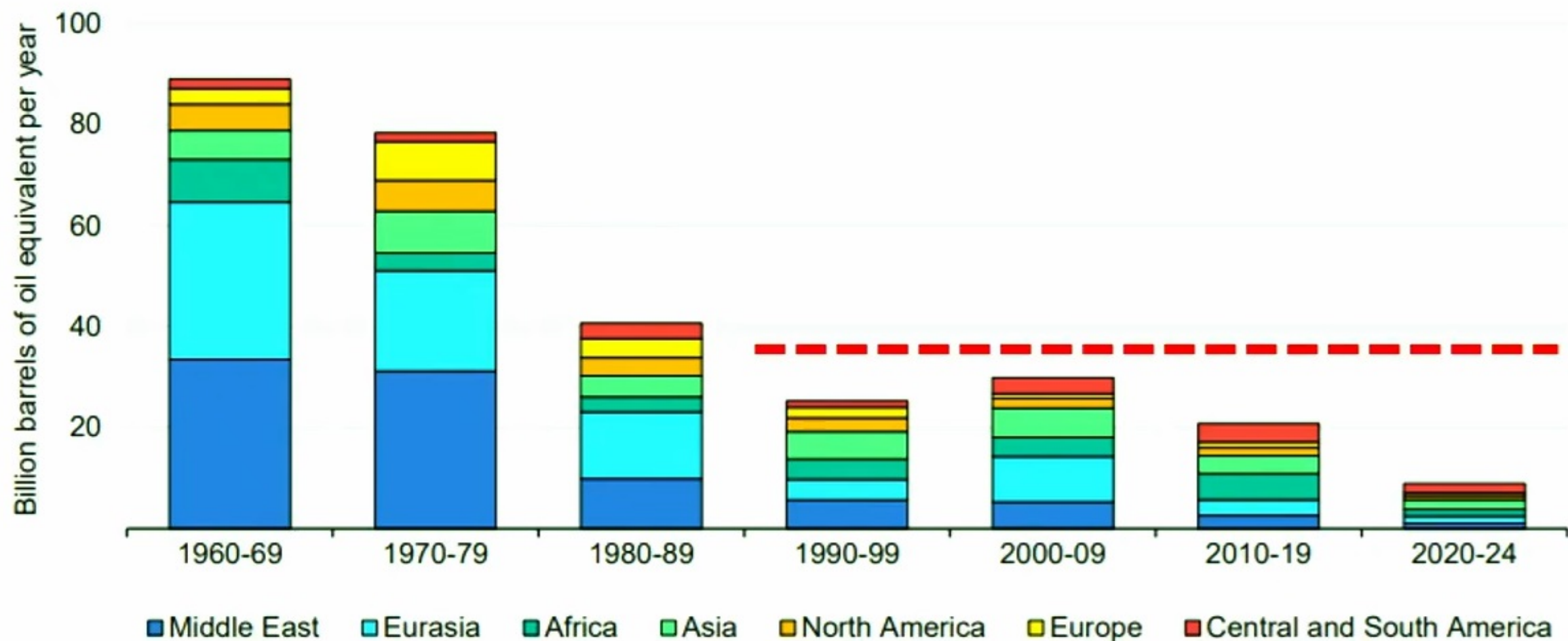
[https://
electrumpower.tech](https://electrumpower.tech)



Notice

- The Opinions expressed by the participants on this show are their own. All statements and opinions expressed are based upon information considered reliable although it should not be relied upon as such. Any statements or opinions are subject to change without notice. Information presented is for educational purposes only.

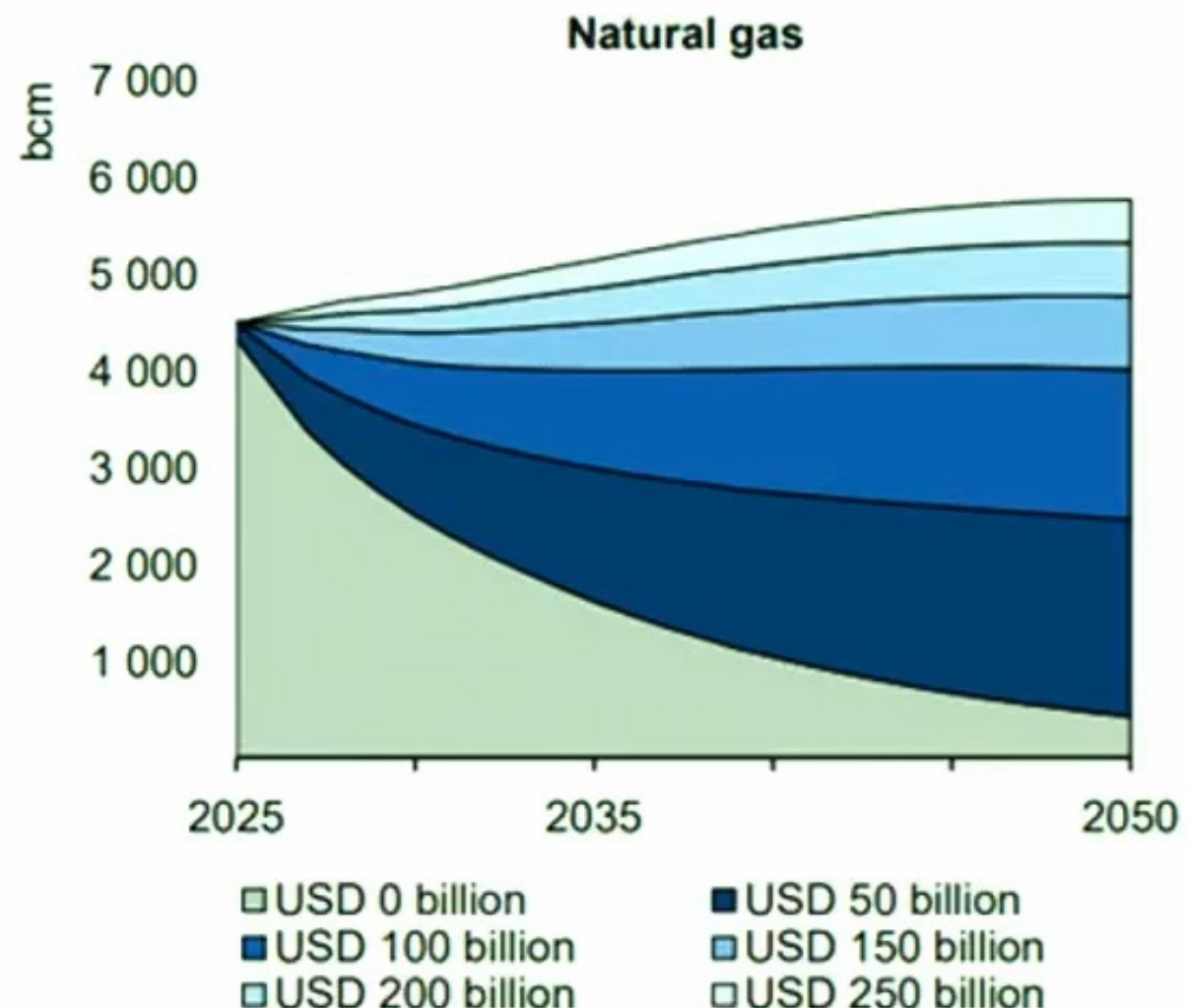
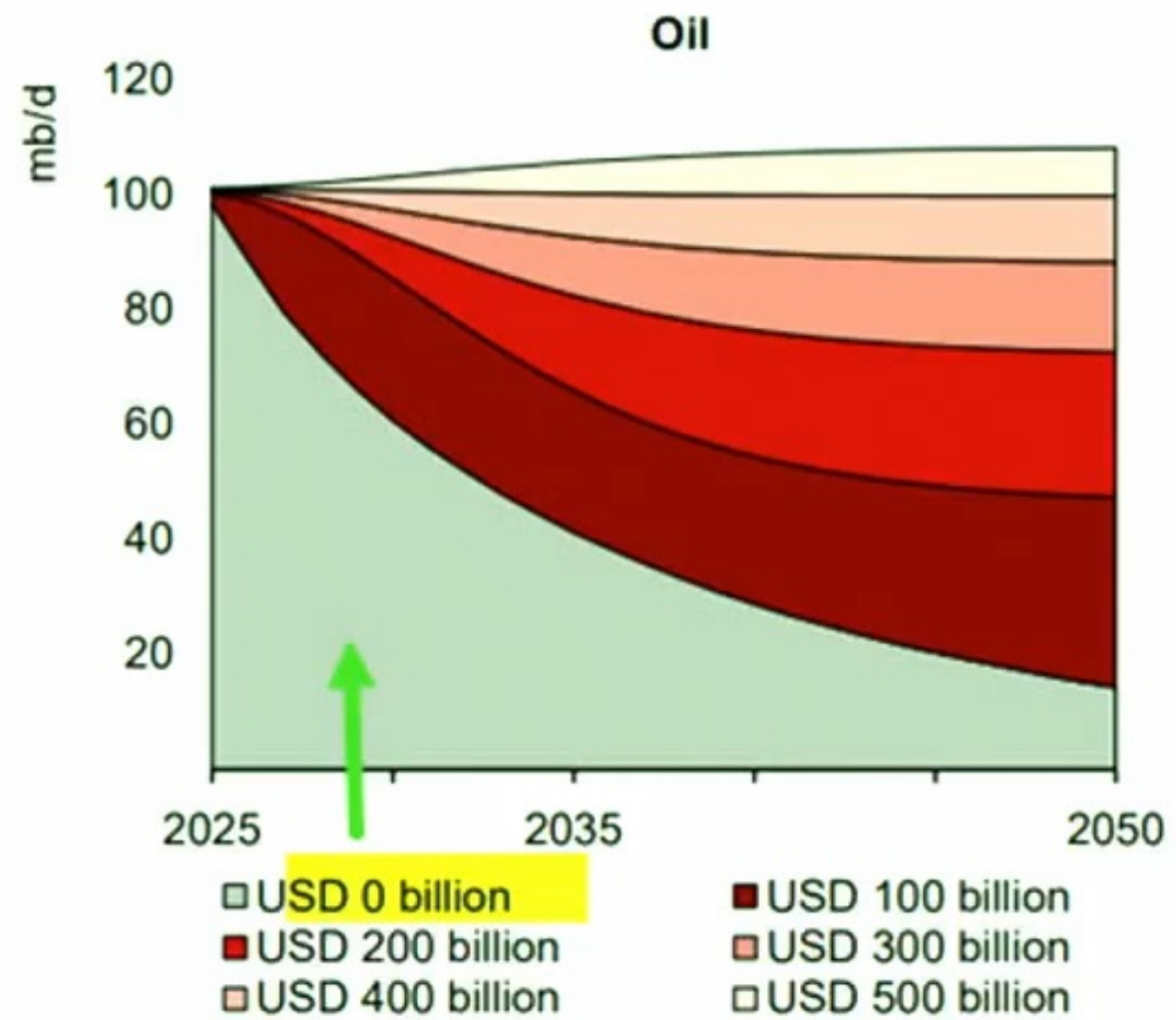
Figure 12 Average annual conventional oil and gas discoveries, 1960-2024



IEA. CC BY 4.0.

Source: IEA analysis based on data from Rystad Energy (2025).

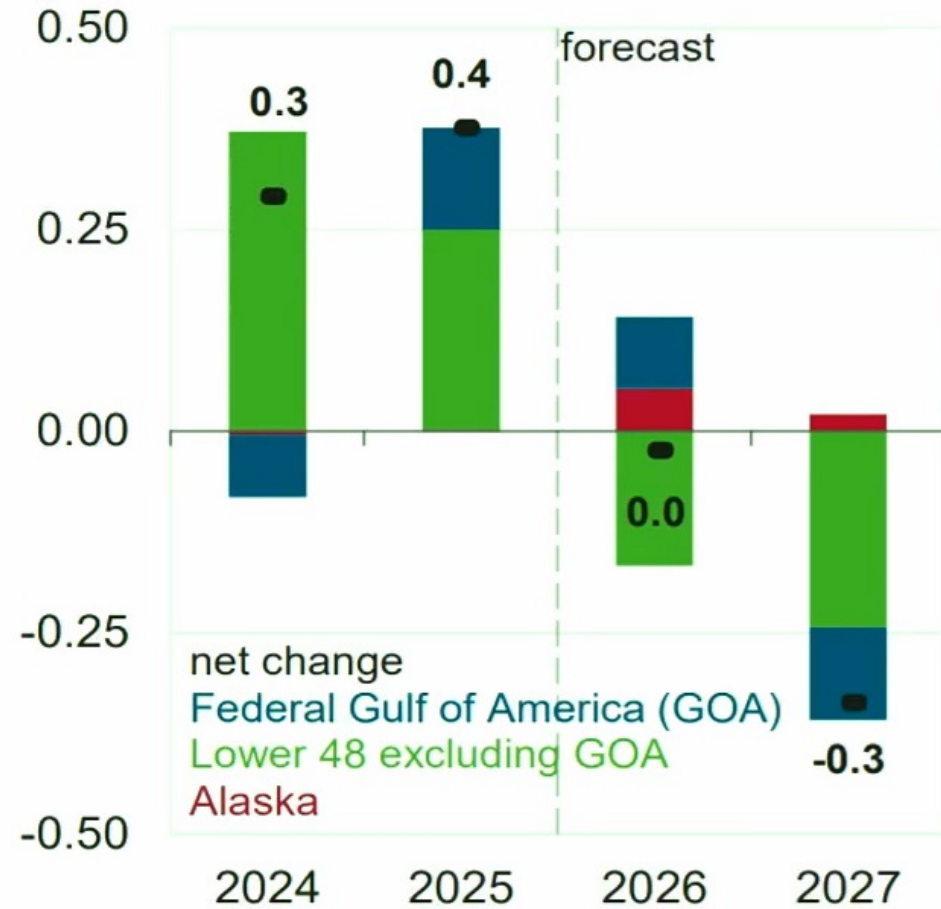
Figure 43 Global oil and natural gas production at varied average annual upstream investment levels to 2050



U.S. crude oil production million barrels per day



Components of annual change million barrels per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, January 2026

Shale Production

Production falls 74% the first year.

Production falls 47% the second year.

Production falls another 47% the third year.

By the fourth year steel pipe is cannibalized.

The CEO's of Diamondback, Occidental, Chevron and ConocoPhillips have stated in SEC filing to investors, U.S. Shale production has peaked.

U.S. Oil reserves Proven and Probable

ExxonMobile has 11 years.

Chevron 8.5 years.

BP 7.9 years.

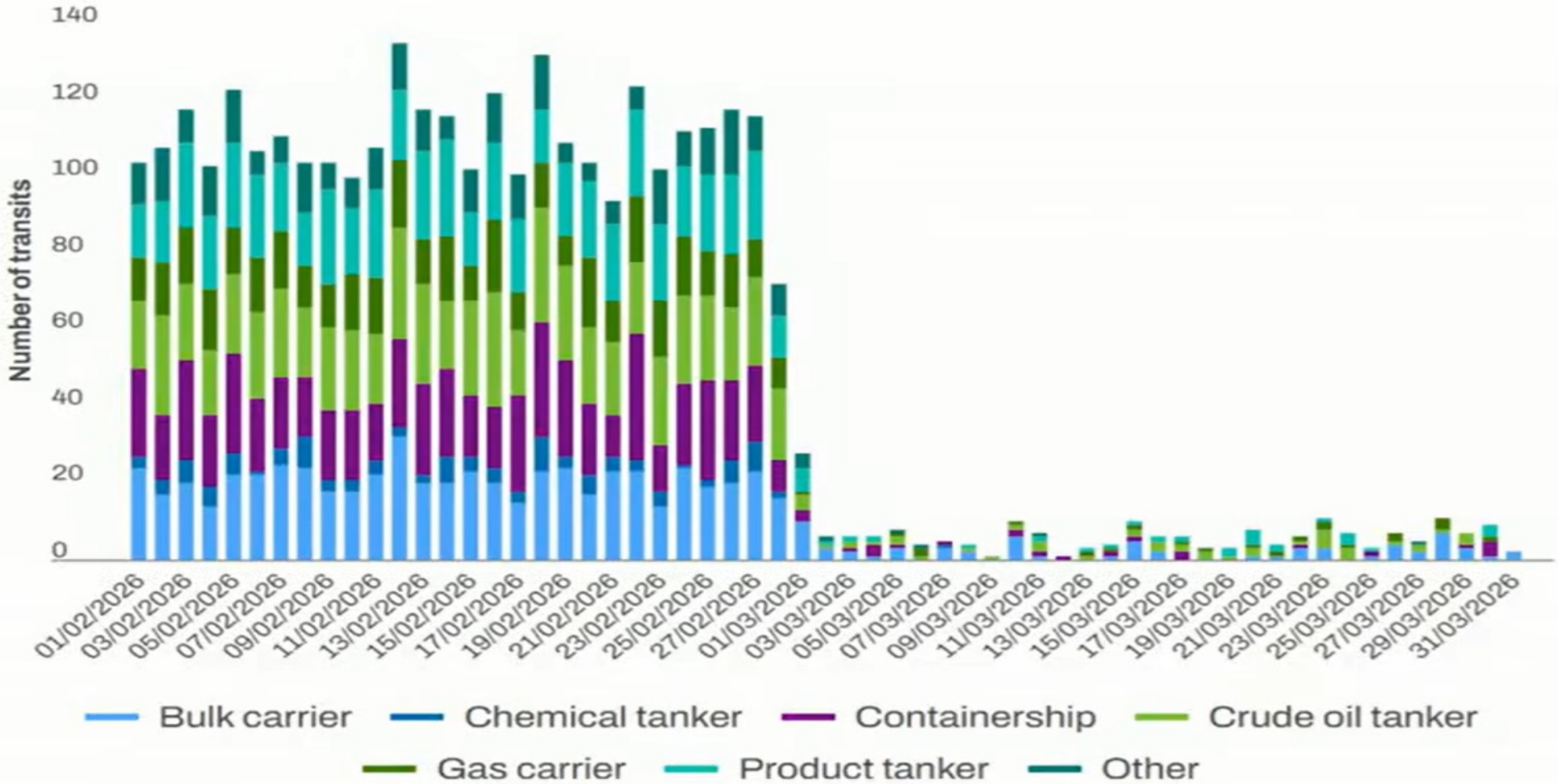
Royal Dutch Shell 7 years.

Gulf of America maximum production 2 mbd
by 2030.

- Note: due to costs production will end ~2037.

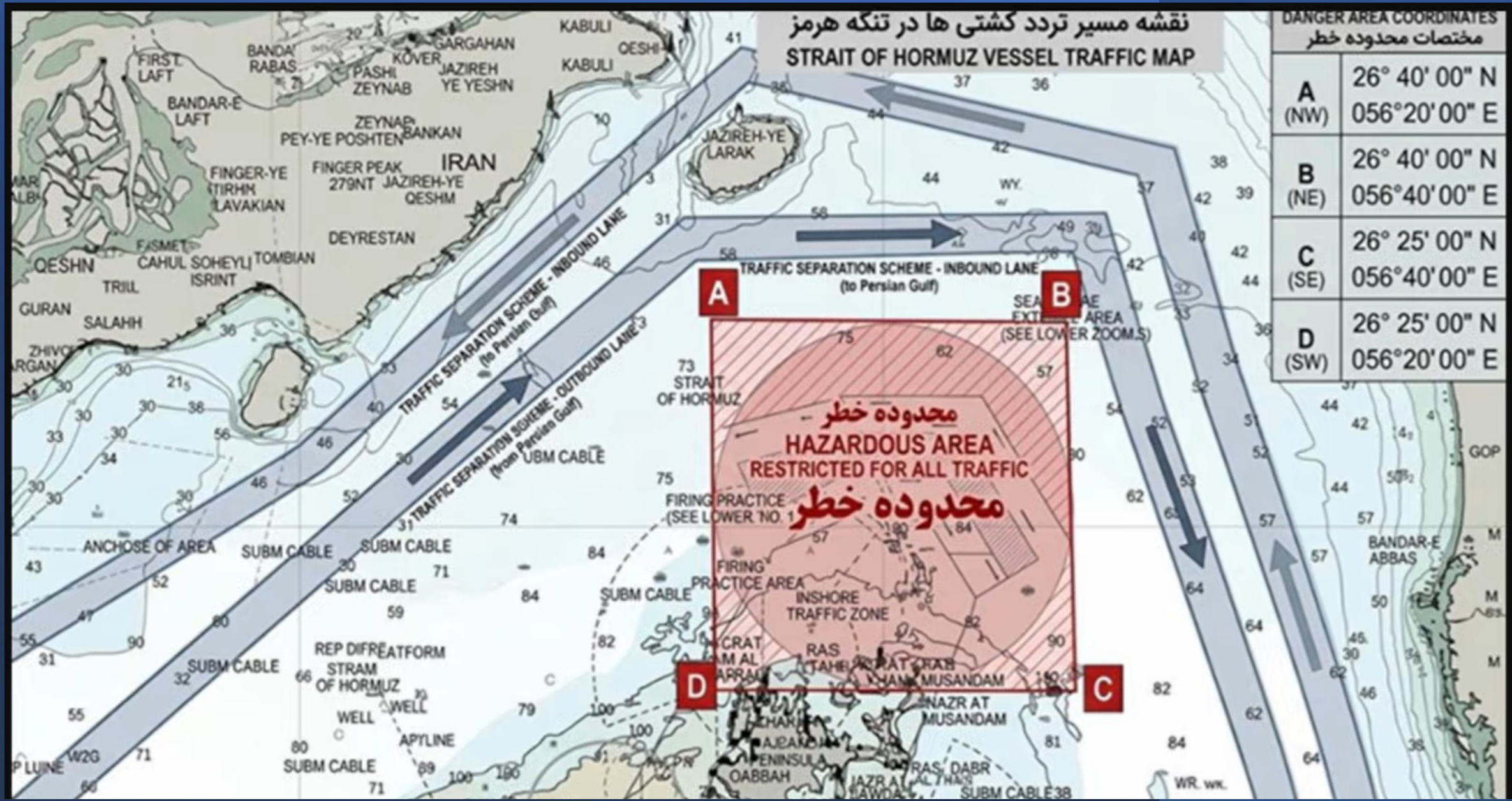
Brazil, Guyana, Venezuela 4 mbd.

Strait of Hormuz daily traffic by sector



Source: [Lloyd's List Intelligence / Seasearcher](#)

Note: Traceable transits of cargo-carrying vessels over 10,000 dwt. Dark transits included in the figures after February 28, 2026. Dark transit information will be updated as more data becomes available



DANGER AREA COORDINATES
مختصات محدوده خطر

A (NW)	26° 40' 00" N 056° 20' 00" E
B (NE)	26° 40' 00" N 056° 40' 00" E
C (SE)	26° 25' 00" N 056° 40' 00" E
D (SW)	26° 25' 00" N 056° 20' 00" E

TAGS:

[Strait of Hormuz crisis](#) | [Tankers and Gas](#) | [Political Risk and Trade](#)

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Iran unveils its own Hormuz traffic separation scheme

- *Vessels transiting the chokepoint must coordinate with the IRGC Navy*
- *Iran's latest guidance explicitly warns of anti-ship mines in the main traffic zone of the strait*
- *IRGC Navy continues to vet all traffic passing through the strait on the basis of geopolitical affiliation*

09 Apr 2026 | NEWS

by [Lloyd's List](#)

The IRGC Navy has suggested the scheme is a way of avoiding potential sea mines, but analysts have questioned how likely this is



Analysis

About 20.6 mbd transit the Straights of Hormuz.

Traffic has collapsed by 92%.

Larger than the 1973 disruption by 3 to 5 Times.

Oil Tankers trapped in and outside the Persian Gulf.

- ~30 VLCCs trapped in the Persian Gulf.
- ~90 VLCCs trapped outside the Persian Gulf by contract law.

Bypass only changing the risks

Saudi Arabia
East West
pipeline to
Yanbu.

- Theory 7 mbd.
- Designed for temporary service 4 mbd.

UAE to Oman
pipeline.

- Theory 1.8 mbd.
- Actual 1.7 mbd.

Iraq North
pipeline.

- Destroyed.

Total
disruption per
day.

- 15.9 mbd.

Reservoir Revenge

Wells are shut in when storage is at 90%.

Steps to restart.

- Remove sub pump
- Chemical Treatment
- Clean accumulated water
- Replace Pump
- Sediment Clog
- Parrafin
- Pressure Damage

Time to restart.

- Up to 2 years before production is back to 80%.
- Personel and equipment shortage.
- Asian manufacturing

Damaged facilities.

- Over 1 mbd refinery damage.
- Qater LNG Facility damaged for 3 to 5 years.
- UAE Gas Field is on fire.
- Saudi Arabia Petrochemical park is on fire.

Strategic Petroleum Reserve

United States

- 411 Million Barrels
- 125 days supply

Japan

- 350 Million Barrels
- 170 days supply

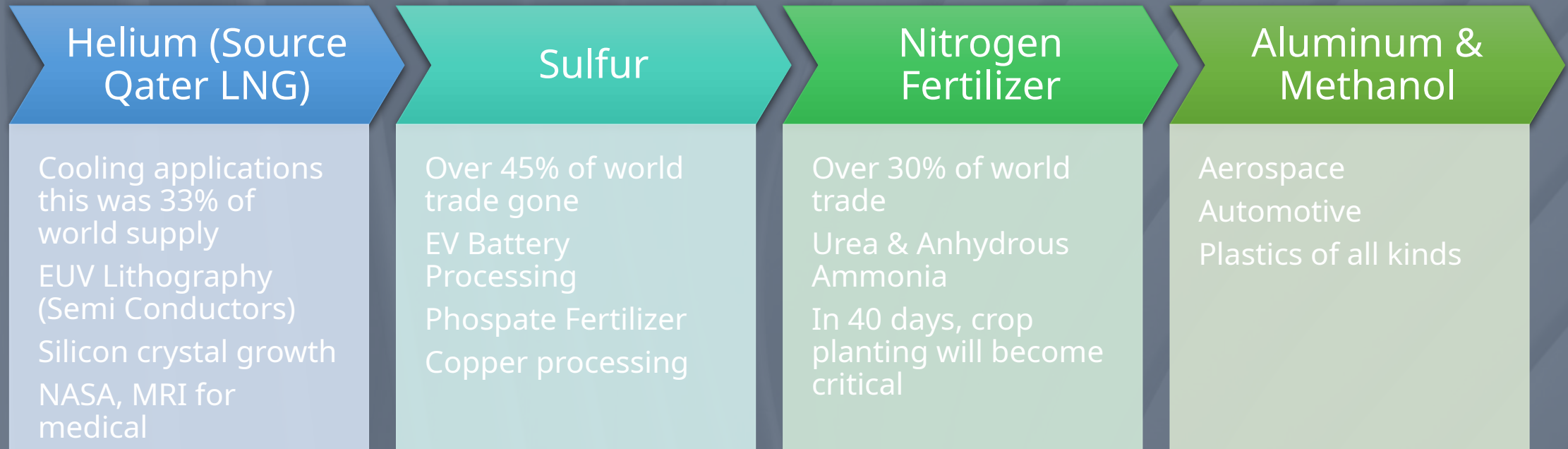
IEA

- 400 Million Barrels
- One time

China

- 1.2 Billion Barrels
- 108 days supply
- Kazakhstan

Metabolic collapse of byproducts



Global South

- As of April 2026
 - Power Plant Usage 23%.
 - Garment Sector down by 70%.
 - Diesel in Storage down by 70%.
 - LNG Imports are suspended
 - Social Unrest
 - Industrial Collapse due to diesel shortage
 - Military guarding what is in storage

Risk to World GDP

Short

- Up to 2 weeks Strait of Hormuz Closed

Medium

- From 4 to 6 weeks Strait of Hormuz Closed

Prolonged

- From 3 to 6 months Strait of Hormuz Closed
- \$2.2T GDP Loss

Fossil Fuel Addiction

Nations Most Exposed

- Those nations without renewables

Economics

- Stagflation

Cracker economics

- Plastics Industry starved of feed stock for plastic
- The world is short Over 7 million metric tons of ethylene

A Ripple of 2 to 5 years

Phase 1

Phase 1

- Hormuz Shock
- Iran become a world energy risk

Phase 2

Phase 2

- From 2027 to 2028
- Refinery capacity moved from Middle East
- North America, Brazil, Argentina and Guyana considered safe as an energy source
- Iran has become a permanent security risk

Phase 3

Phase 3

- From 2029 to 2030
- Rise of Electric Transportation in Japan and EU
- China center of world supply chain
- End of just in Time manufacturing
- Replaced with Just in Case manufacturing
- Corporate costs rise

Summary

- Permanent Hormuz Risk Premium
 - Cost embedded into World Manufacturing
 - Permanent rise in prices Worldwide
- Western hemisphere safe haven
 - U.S., Canada, Brazil, and Guyana
 - New investments at the expense of Persian Gulf States
 - Status of Venezuela in unknown
- World Food shortages
 - Caused by fertilizer shortage
 - World wide crop yields will reduce from 2027 to 2028
 - Political Issue for decades
 - Starvation
- Straights of Hormuz not opened by July 2026
 - Persian Gulf Countries will become a Legacy Asset by 2030

Energy Storage	Type	Lower Energy Value Watt Hours per kg	Higher Energy Value Watt Hours per kg	Lower Energy Value BTU per lbs	Higher Energy Value BTU per lbs	Lower Energy Value Joules per kg	Higher Energy Value Joules per kg
Lead Acid Battery	Battery	30	50			108,000.00	180,000.00
NiCd	Battery	45	80			162,000.00	288,000.00
NiMH	Battery	60	120			216,000.00	432,000.00
Li-ion Cobalt	Battery	150	190			540,000.00	684,000.00
Li-ion Maganese	Battery	100	135			360,000.00	486,000.00
Li-Ion Phosphate	Battery	90	120			324,000.00	432,000.00
Sodium Ion	Battery	380	458			1,368,000.00	1,648,800.00
Trees	Wood			8406	17703	19,551,000.00	20,589,000.00
Methanol	Liquid			8369	65200	20,095,000.00	22,884,000.00
Bituminous	Coal			11230	23445	26,122,000.00	27,267,000.00
Low Sulphur Diesel	Liquid			18230	18490	42,612,000.00	45,575,000.00
Jet Fuel	Liquid			19320	25080	42,791,000.00	45,766,000.00
Gasoline	Liquid			18679	24340	43,448,000.00	46,536,000.00
Propane	Gas			19904	21420	46,296,000.00	50,235,000.00
Butane	Gas			19466	23220	45,277,000.00	49,210,000.00
LNG	Gas			20908	24820	48,632,000.00	55,206,000.00
Hydrogen	Gas			51682	61127	120,210,000.00	142,180,000.00

Questions

