



THE INTERNATIONAL
ASSOCIATION FOR
NATURAL GAS

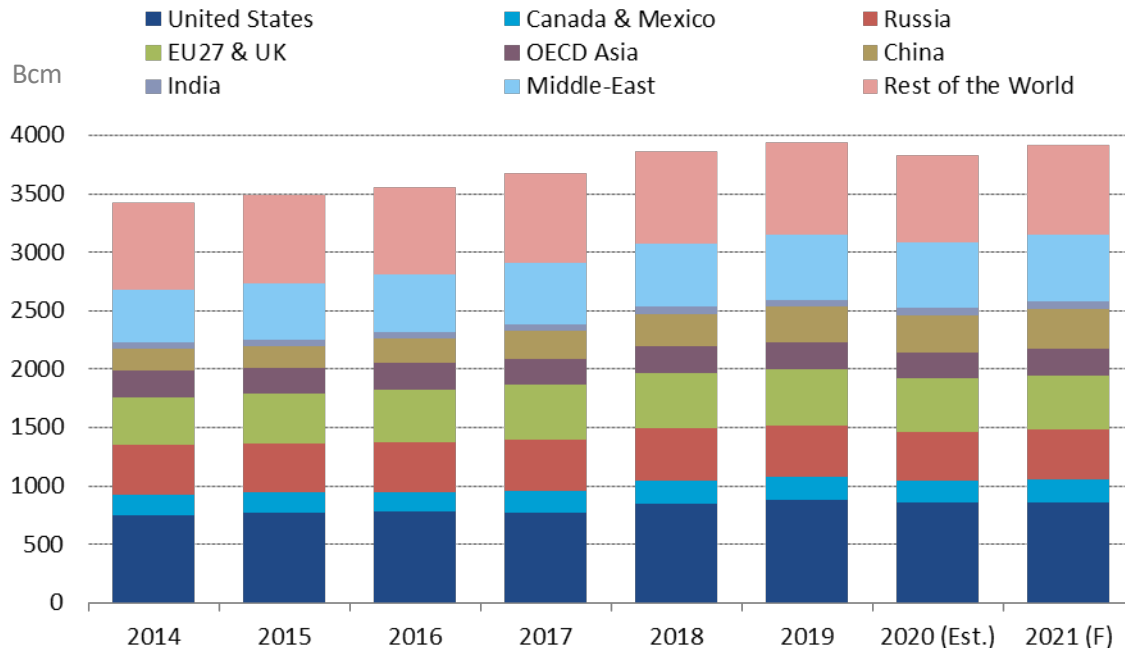


Supply competition in Europe's gas markets

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Evolution of world gas demand

Volatility and uncertainty



Source: Cedigaz

2020/19: - 2.6% (EU27: - 3.8%)

2021/20: + 2 - 3%

2030/20: + 1.8%/year

EU gas demand in 2021

Weather ?

Covid-19 ?

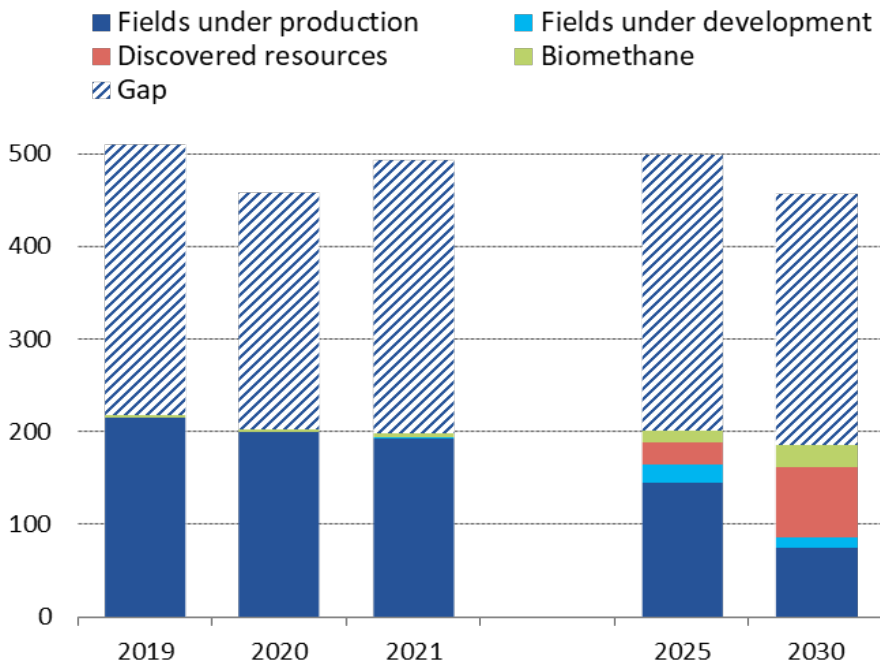
Economic growth ?

Prices ?

Gas vs. Coal Competition ?

Evolution of European gas supply (EU27, UK, Norway)

Trajectory towards the 2°C policy target



Unit: Bcm

Source: Cedigaz

IMPORT DEPENDENCE

2020: 56%
2021: 60%
2021-2030: 60%

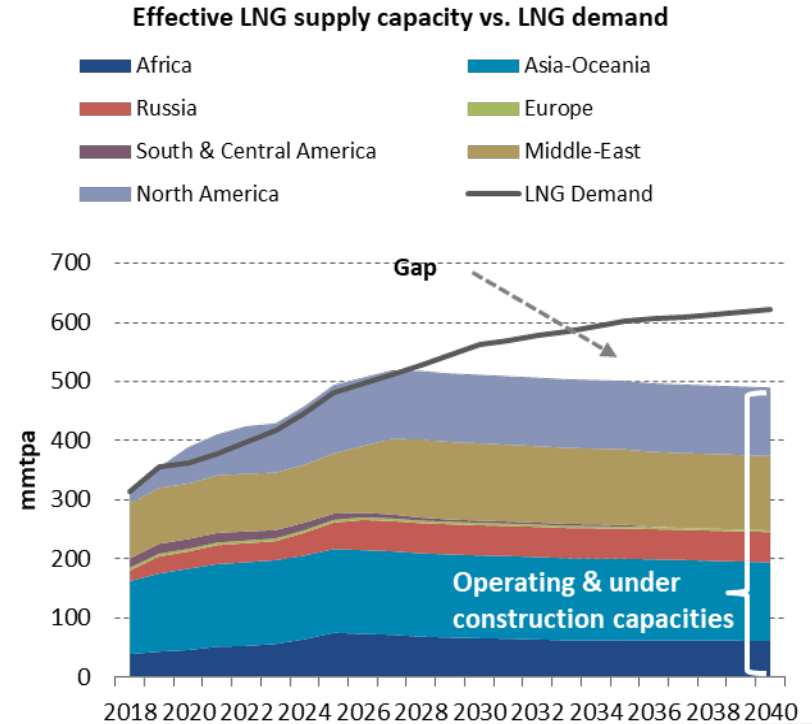
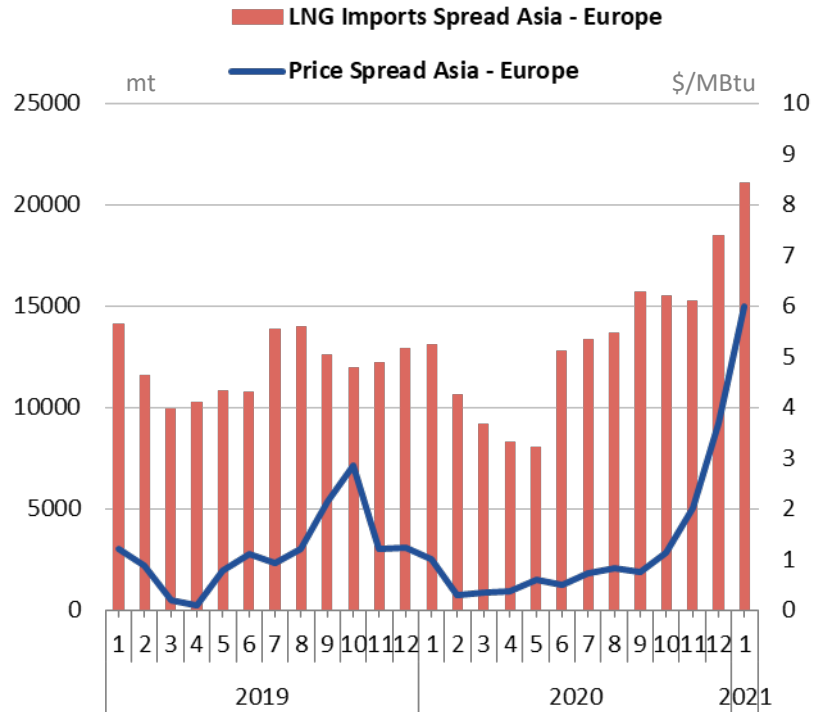
- Security
- Diversity
- Flexibility
- Affordability



*Growing role of
Russia and LNG*

A tightening world LNG market

Risk of tensions remain



Source: Cedigaz



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dedicated to natural gas information
and with members all over the
World. CEDIGAZ data has been the
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its foundation in 1961.

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