



cutting through complexity™

Regional Natural Gas and Energy Perspectives

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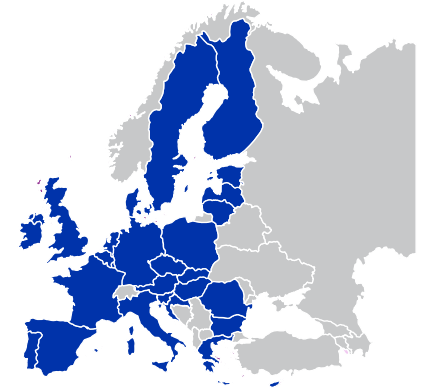
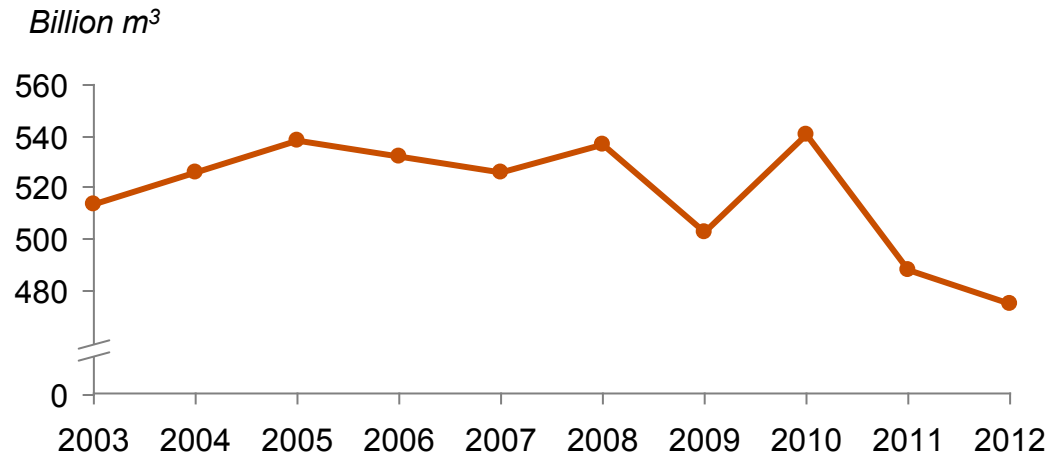
*Natural Gas Europe – Development & Use of
Natural Gas in the Danube Region:
Prospects and Opportunities*

16th September 2014

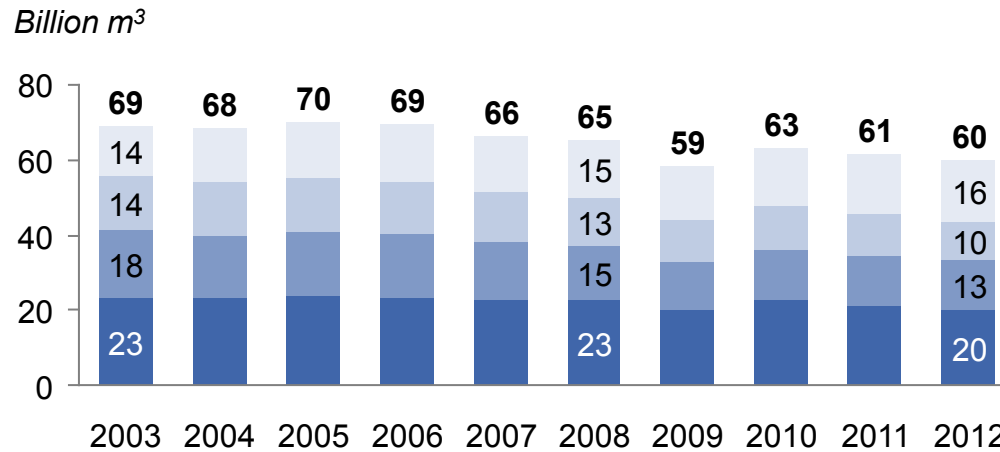


Consumption of natural gas in the EU has decreased in the recent years

Evolution of natural gas consumption in the EU (incl. Croatia)



Natural gas consumption of some CEE countries in 2012



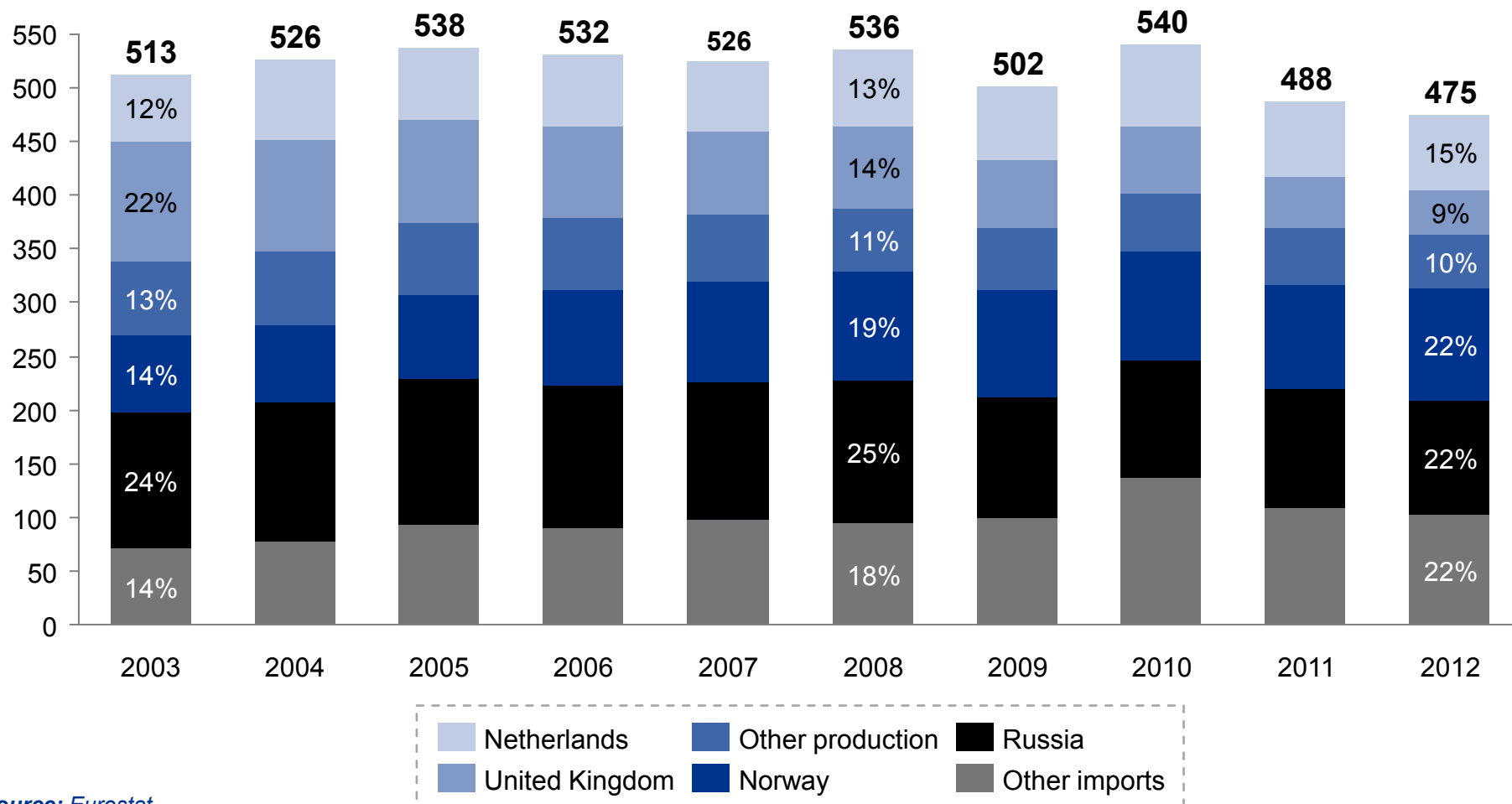
Poland
 Hungary
 Romania
 Other CEE (CZ, SK, SL, HR, BG)

Source: Eurostat

The structure of natural gas sources has changed significantly

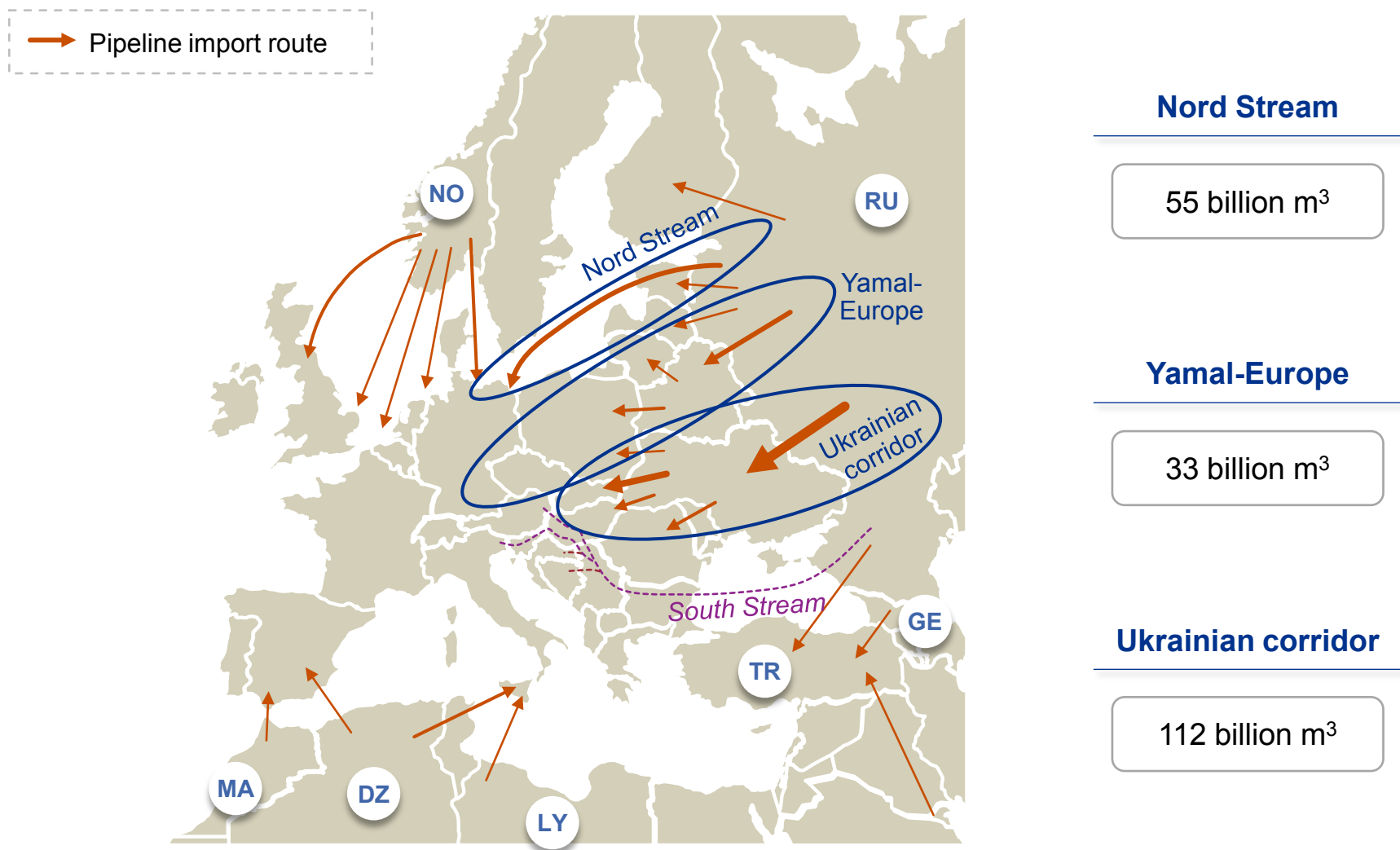
Natural gas by source in the EU

Billion m³/year



Source: Eurostat

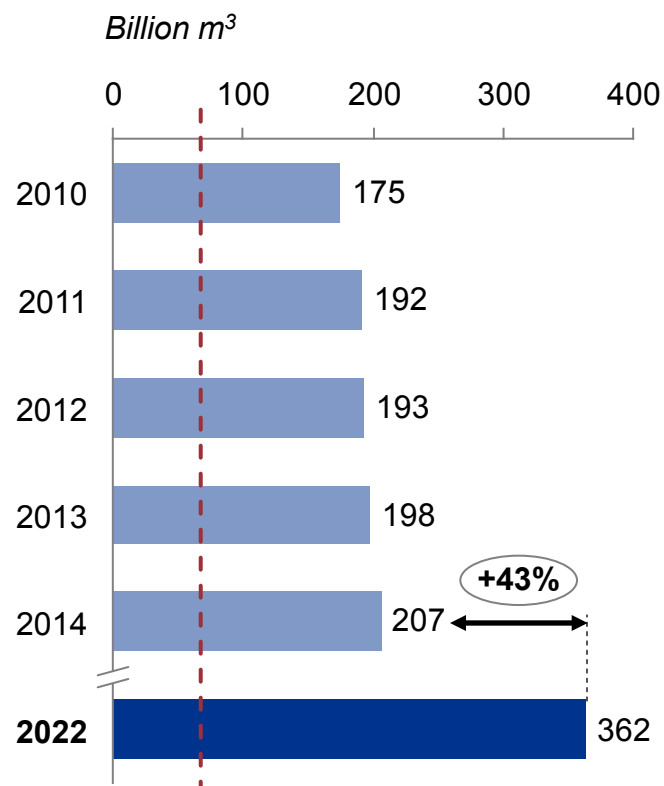
Significant amount of East-West capacities already available



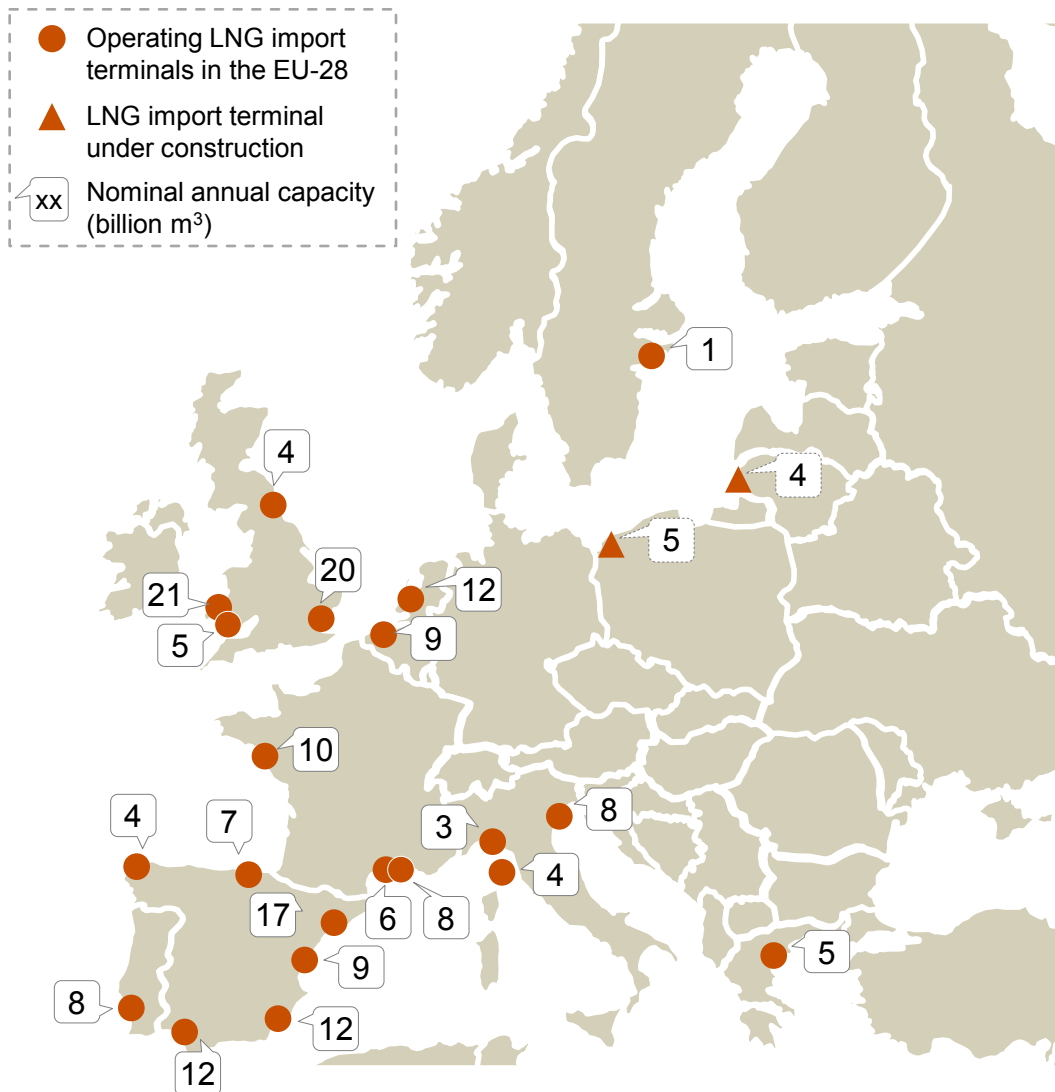
Source: ENTSO-G; KPMG analysis

LNG has been playing an increasingly important role in supplying Europe

Total LNG capacity in Europe included proposed projects



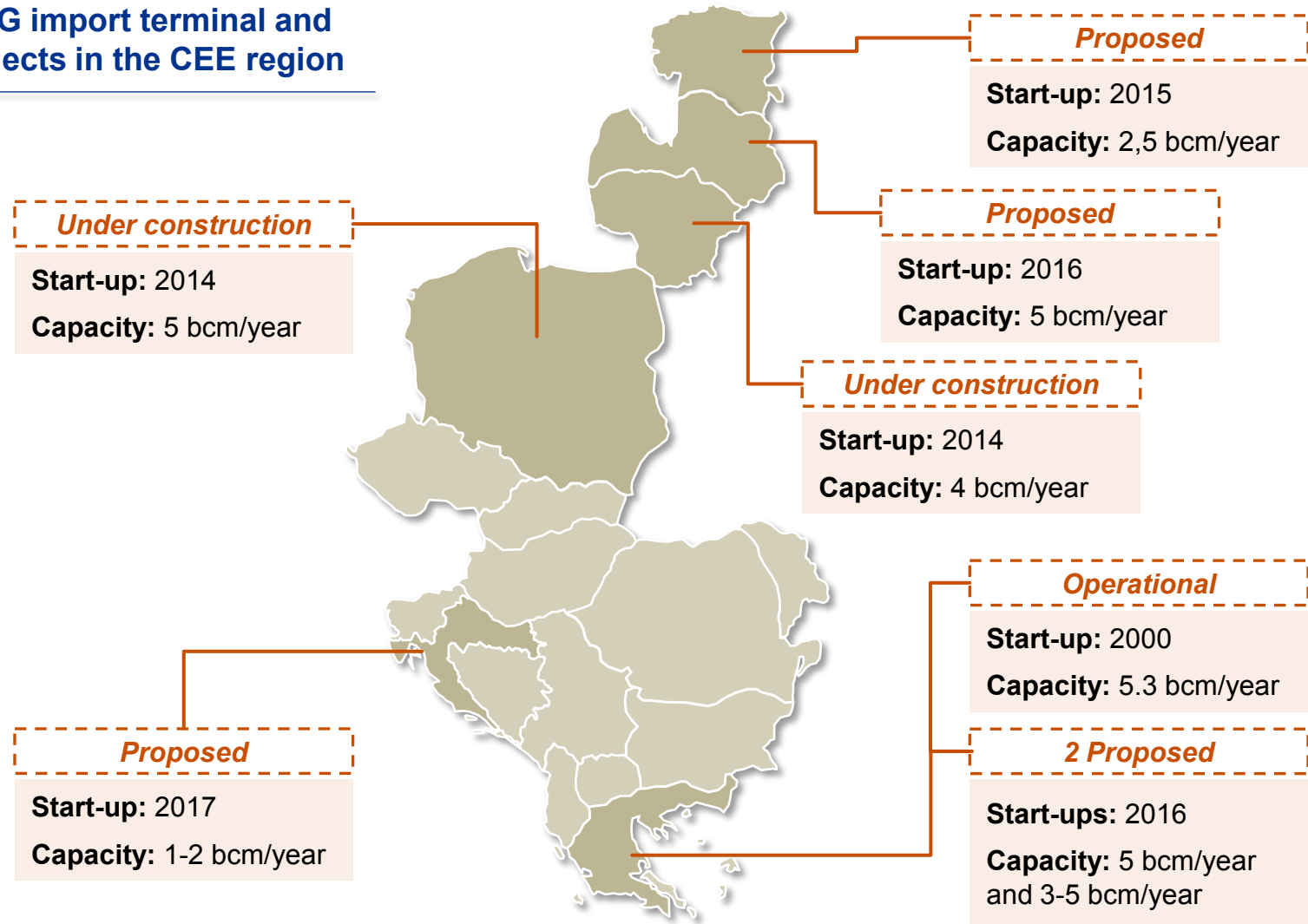
LNG consumption (2012) 58 billion m³



Source: Engerer et al. 2014; Gas Infrastructure Europe, June 2014

Several LNG projects are under construction or proposed in the CEE region

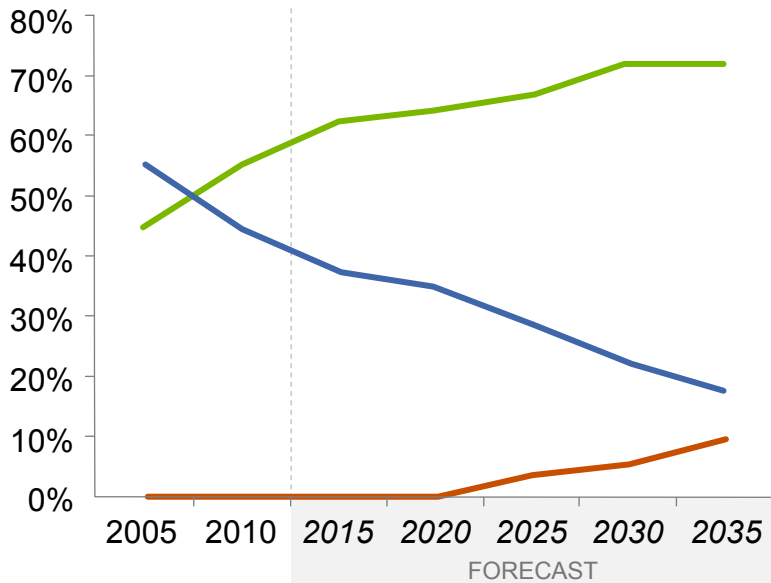
LNG import terminal and projects in the CEE region



Source: Gas Infrastructure Europe, June 2014

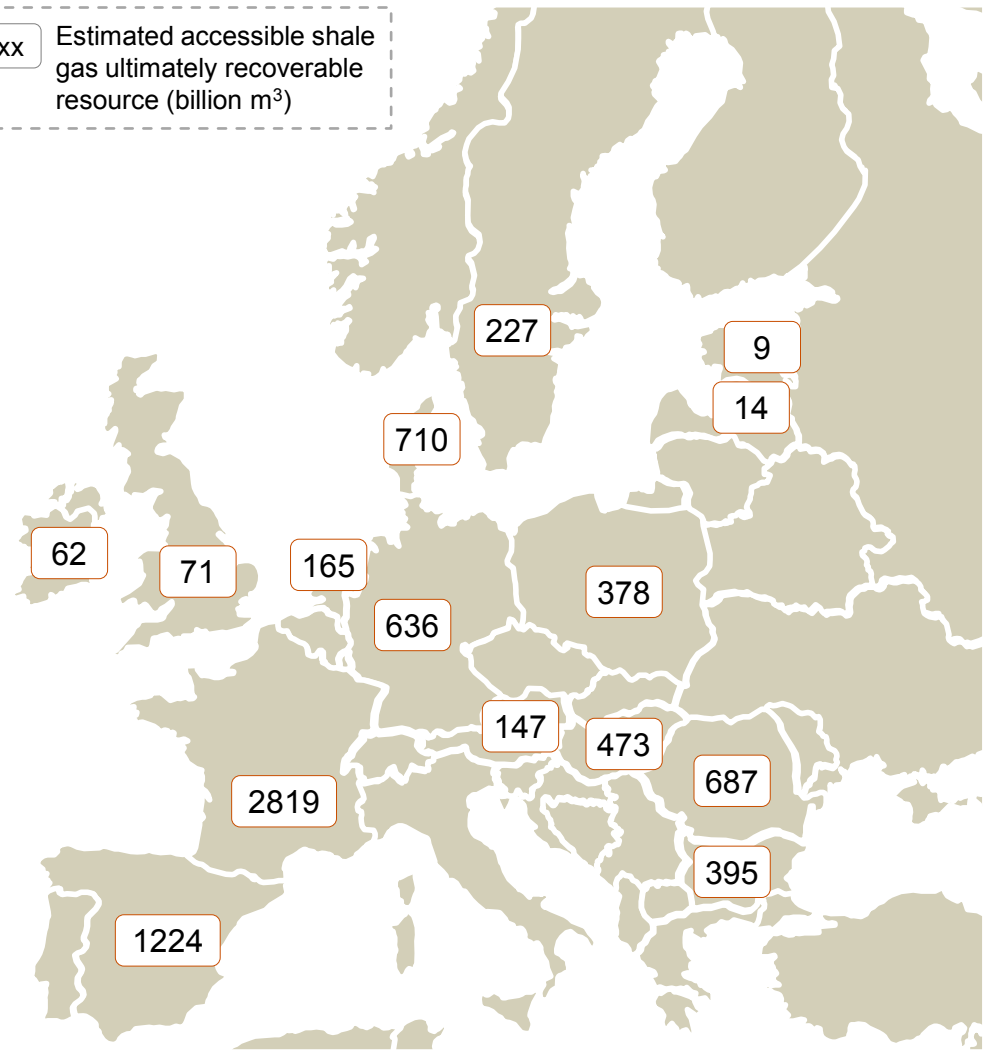
Shale gas production can reach at least 10% of EU consumption by 2030

Share of EU gas consumption covered by different gas sources



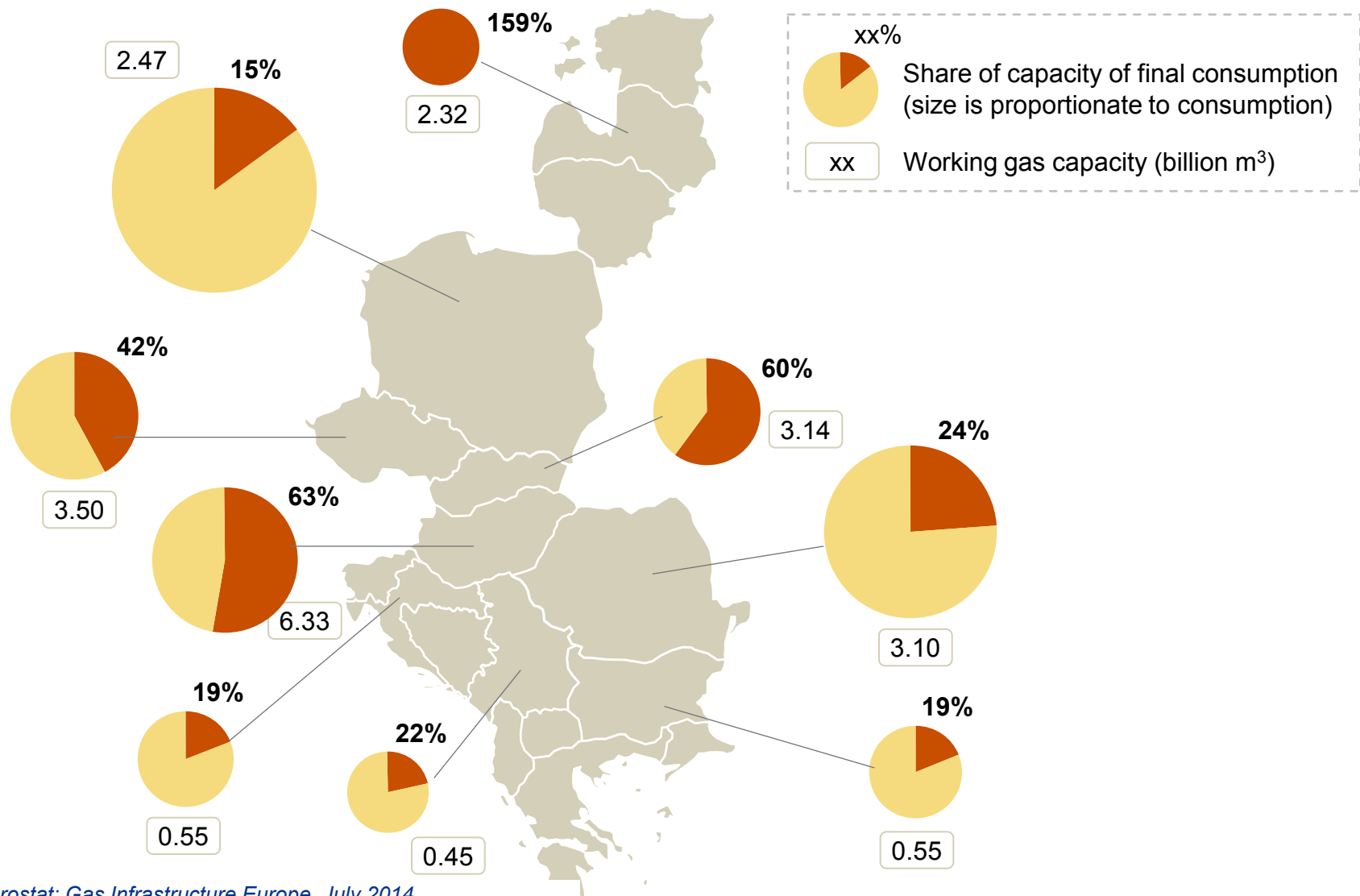
- Covered by gas imports
- Covered by EU conventional gas production
- Covered by EU shale gas production

xx Estimated accessible shale gas ultimately recoverable resource (billion m³)



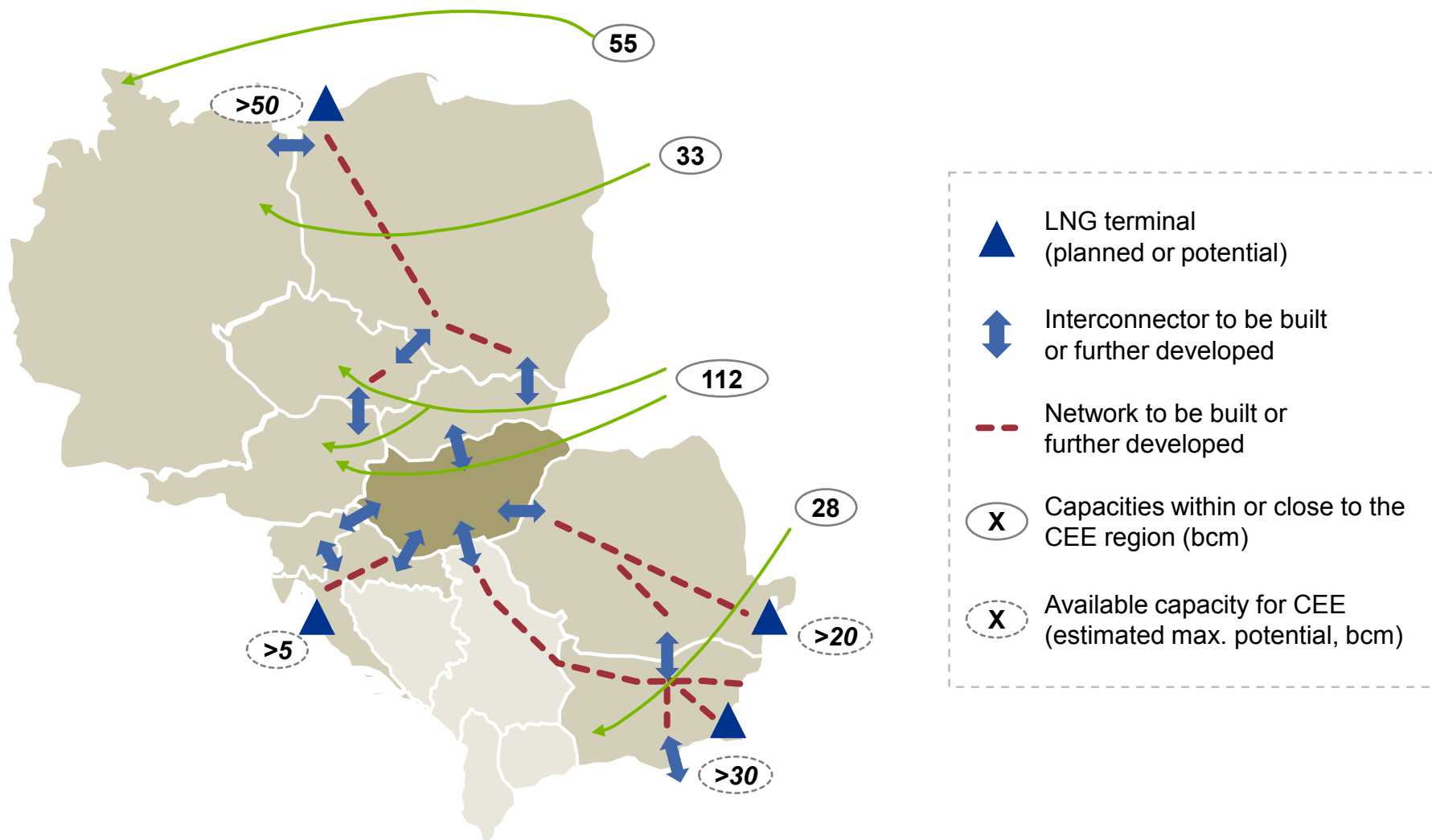
Source: European Commission: Macroeconomic impacts of shale gas extraction in the EU, 2014; KPMG analysis

Significant amount of storage capacities is available in the CEE region



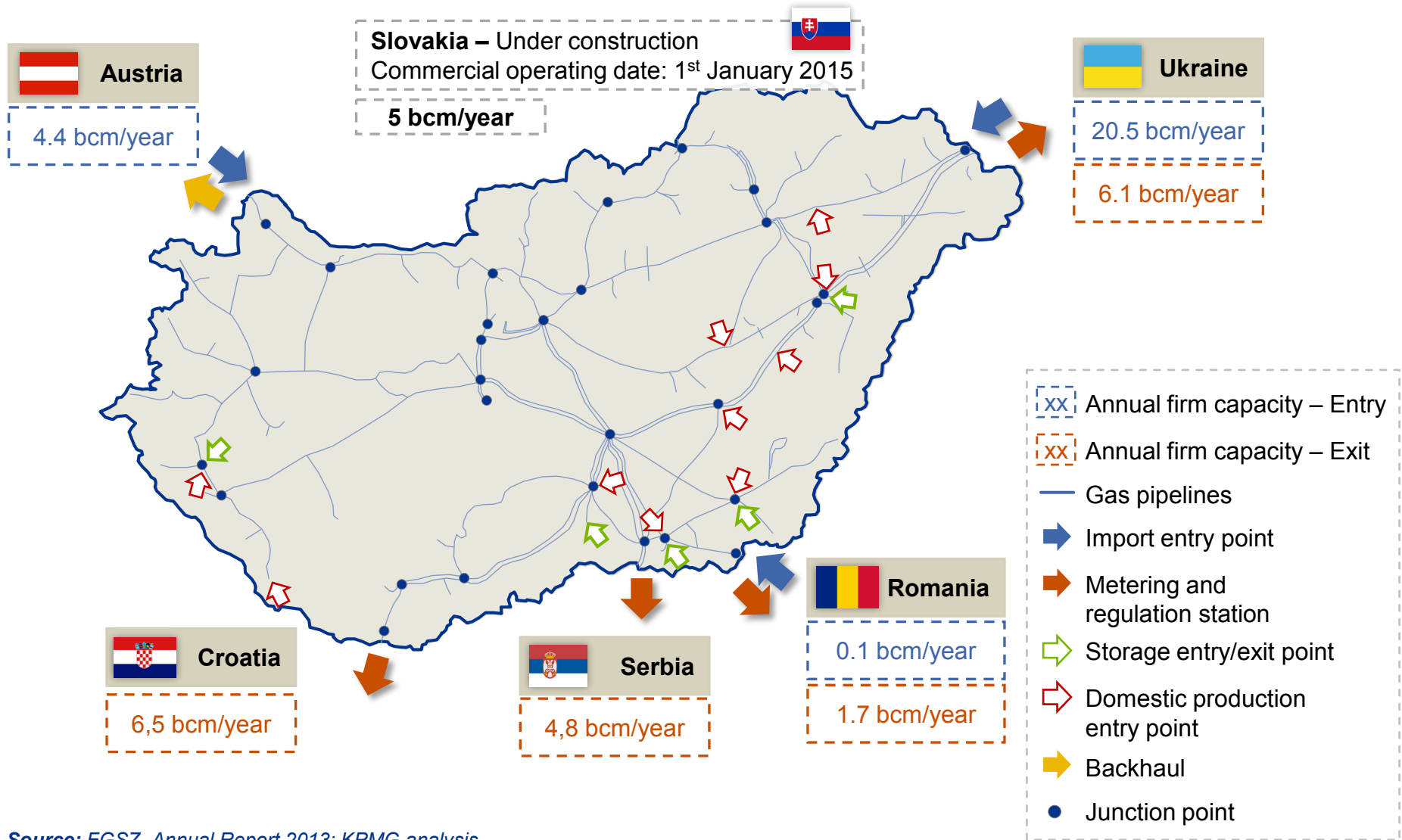
Source: Eurostat; Gas Infrastructure Europe, July 2014

Further infrastructural developments are needed within the CEE region



Source: Action Plan for North-South Energy Interconnections in Central-Eastern Europe; KPMG analysis

Hungary is already well-connected to the neighbouring countries



Source: FGSZ, Annual Report 2013; KPMG analysis

Thank you for your attention!

For further information



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