

Global Guide to Natural Gas Utilities

Report Edition 1, 2012

Market Intelligence

Carbon reduction commitments and low gas prices relative to other fossil fuels have made natural gas more attractive for power generation and transportation. Overall consumption of natural gas has been growing worldwide. In emerging economies such as China and India domestic supply has not been able to meet growth in demand.

More countries are importing natural gas. Increasingly this natural gas is being transported over longer distances. Thus, the transportation of liquefied natural gas (LNG) has been outpacing growth in the trade of natural gas via pipelines, which is more expensive over longer distance.

Consequently, the natural gas market is becoming more international and much larger.

Europe

As a whole Europe is a net importer of natural gas. Most of the countries in Eastern Europe are highly reliant on Russia for their natural gas supplies and the rest of Europe has a more diversified , most of which is piped.

Only Denmark, the Netherlands and Norway are net natural gas exporting countries. Their natural gas reserves are expected to last eight, sixteen and twenty two years respectively. Thus, unless new discoveries are made, the region and individual countries are expected to continue to rely on natural gas imports.

CIS

The CIS region is a net exporter of natural gas. Russia is the biggest natural gas exporter with state utility, Gazprom, dominating the market. Reserves of Russian gas are expected to last another seventy five years. Increasingly competition to Russian gas is coming from Turkmenistan – a newer entrant to the natural gas market.

Maghreb

Natural gas is exported from in the Maghreb region. All of which were recently affected by the recent Arab Spring creating a high degree of uncertainty over supplies. Reserves in the three countries are expected to last from twenty seven years to ninety two years for Algeria, the biggest exporter. Natural gas produced is supplied to Europe via pipelines and, to a lesser extent, as LNG.

Sub-Saharan Africa

In Sub-Saharan Africa, Nigeria is the dominant player in the natural gas market. It has the 9th largest reserves in the world, which are estimated to last over one hundred years. The reserves are largely undeveloped as the country has focused more on oil than natural gas.

Middle East

The Middle East is a major gas producing and consuming region. Iran is the largest natural gas producer but exports are severely restricted by sanctions. Therefore most exports are from Qatar, the second largest natural gas producer and now the number one liquefied natural gas (LNG) exporter worldwide. Reserves in both countries are expected to last more than one hundred years. Other countries in the region have natural gas markets and significant potential markets, especially if infrastructure is developed and natural gas flaring is reduced.

Asia Pacific

Overall the Asia Pacific region is a net importer of natural gas with some regional variation. For example,

Korea and Japan are major natural gas importers with very little domestic production. China and India are major growth markets. The distances that natural gas is transported between exporting countries such as Australia, Indonesia and Malaysia and importing countries are large. Thus, a large amount of natural gas is exported as LNG. Within the region, deregulation varies considerably.

South & Central America

Very little natural gas is located in South & Central America. Nearly 66% of the regions' reserves are located in Venezuela. Production of this natural gas has been limited as a large proportion of the natural gas is reinjected to enhance oil production and Trinidad & Tobago and Argentina are the two largest natural gas producers.

North America

Following the discovery of shale gas reserves, the North American gas sector has experienced resurgence. Both Canada and the US may become exporters of natural gas to countries outside the region. Currently the US is the biggest importer and consumer of natural gas in the region.

How can NRG Expert Help?

NRG Expert's Global Guide to Natural Gas Utilities Edition 1 2012. This is a fully comprehensive global directory for the Natural Gas Industry. It includes:

- Description of the different types of natural gas and uses
- Global natural gas situation including reserves, market, trade and the Gas Exporting Countries Forum
- Coverage of the natural gas market at the regional level
- In depth reporting of the economic situation and natural gas market including natural gas production, transportation, distribution and generation of electricity amongst others for 116 countries worldwide.

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