



CEDIGAZ, the International Association for Natural Gas

LONG TERM NATURAL GAS SUPPLY CONTRACTS BY PIPELINES IN EU28

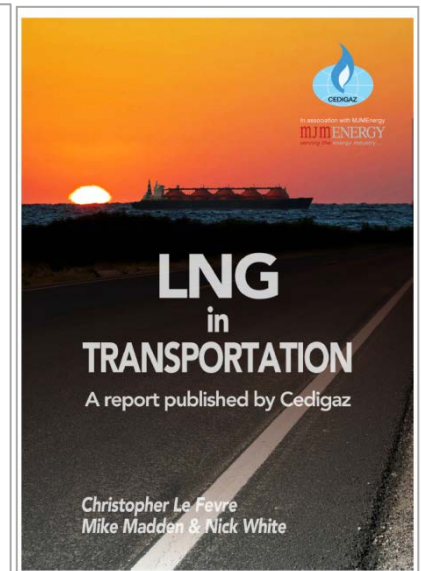
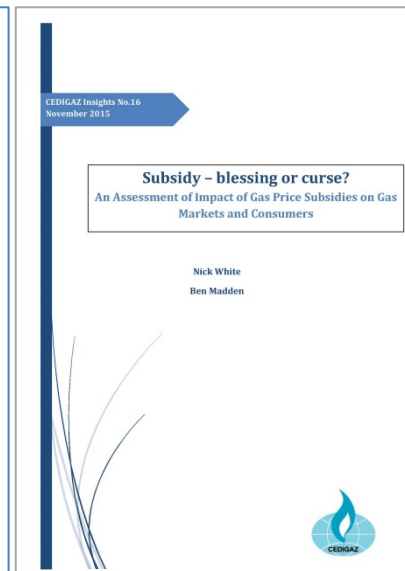
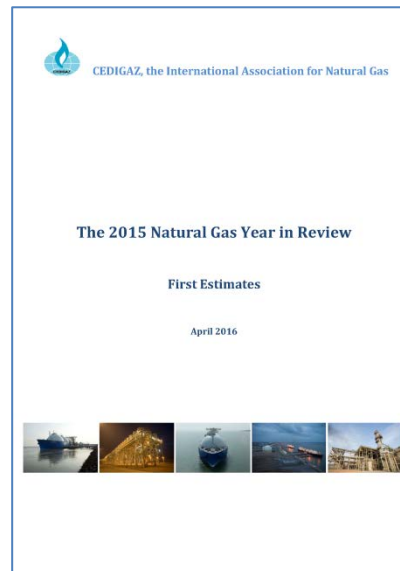
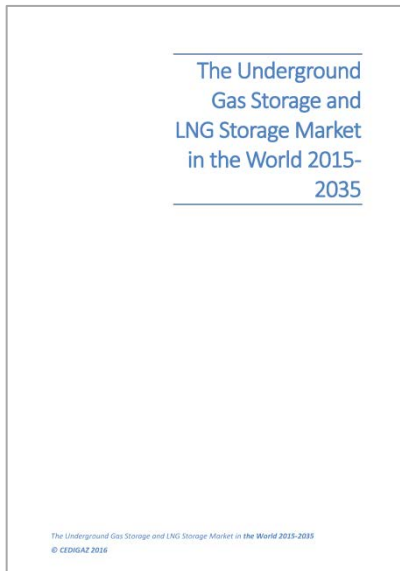


CEDIGAZ - More than 50 years of gas market intelligence

- ❑ Founded in 1961, 90 members in 40 countries
- ❑ Databases (gas statistics, supply contracts, UGS, LNG)
- ❑ Annual surveys and thematic studies
- ❑ News reports

WORLD UGS STUDY (Coming soon)
Published since 1990

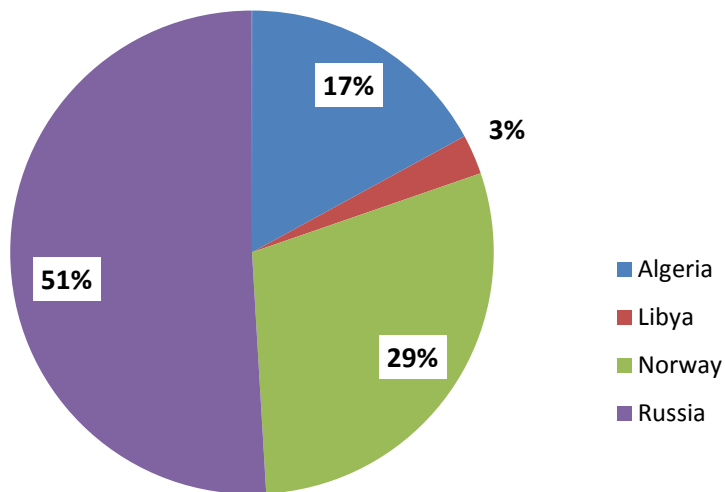
RECENT STUDIES



Contracts with non-EU28 countries

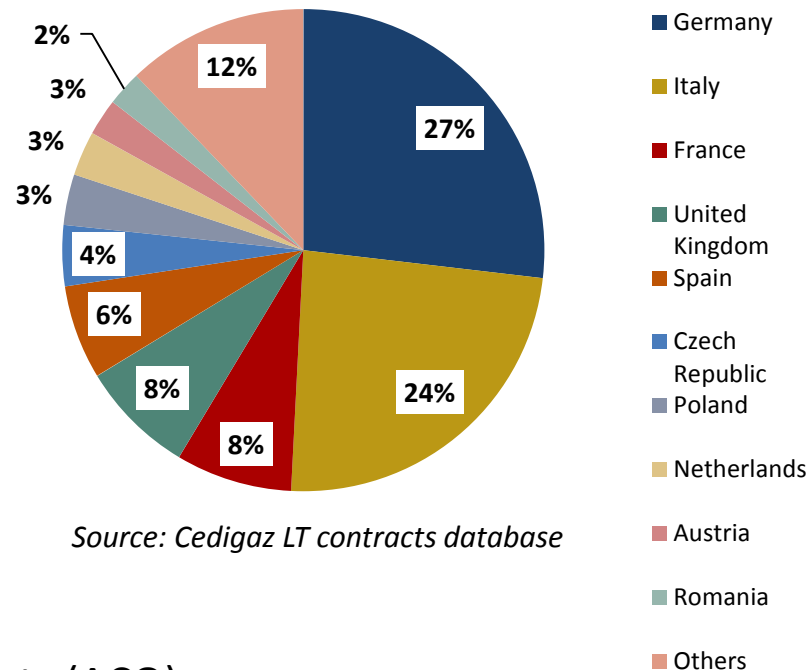
Around 360 bcm (ACQ) in force in 2016

Share by exporting country



Source: Cedigaz LT contracts database

Share by importing country



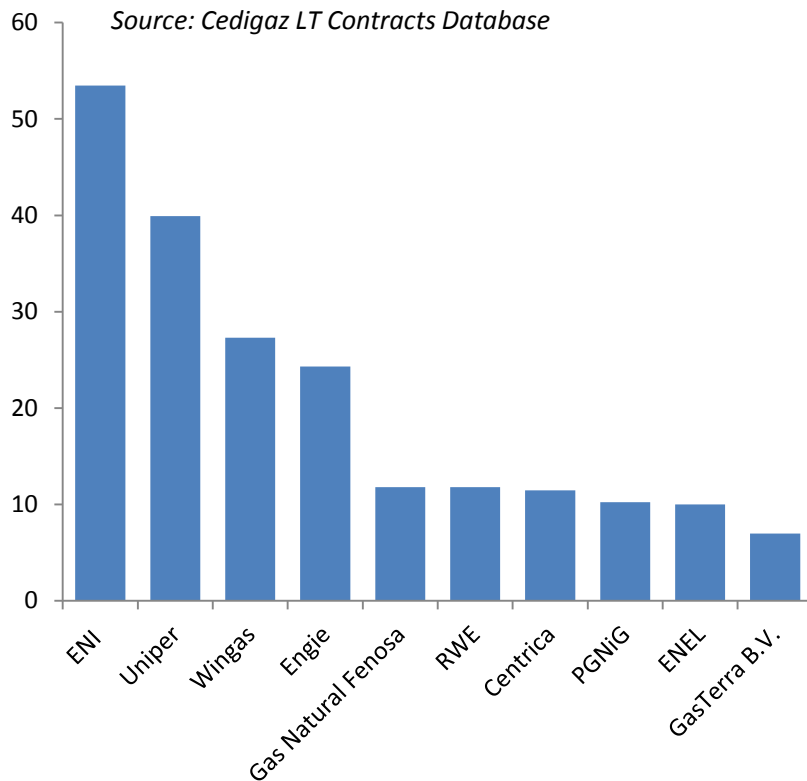
Source: Cedigaz LT contracts database

Russia represent more than 50% of contracts (ACQ)

Germany and Italy own more than half total contracted volumes (ACQ)

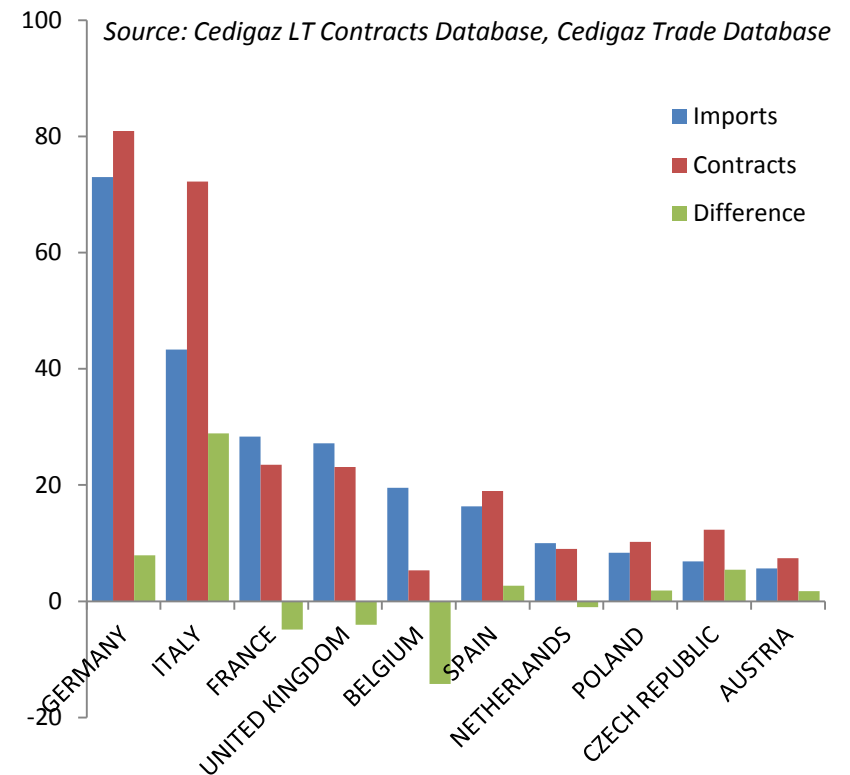
- ✓ Engie & Uniper account for almost 1/3 of contracted volumes
- ✓ The top 4 contract holders represent almost 1/2 of contracted volumes
- ✓ Italy is largely over-contracted

Top 10 contracts holders (ACQ-bcm)

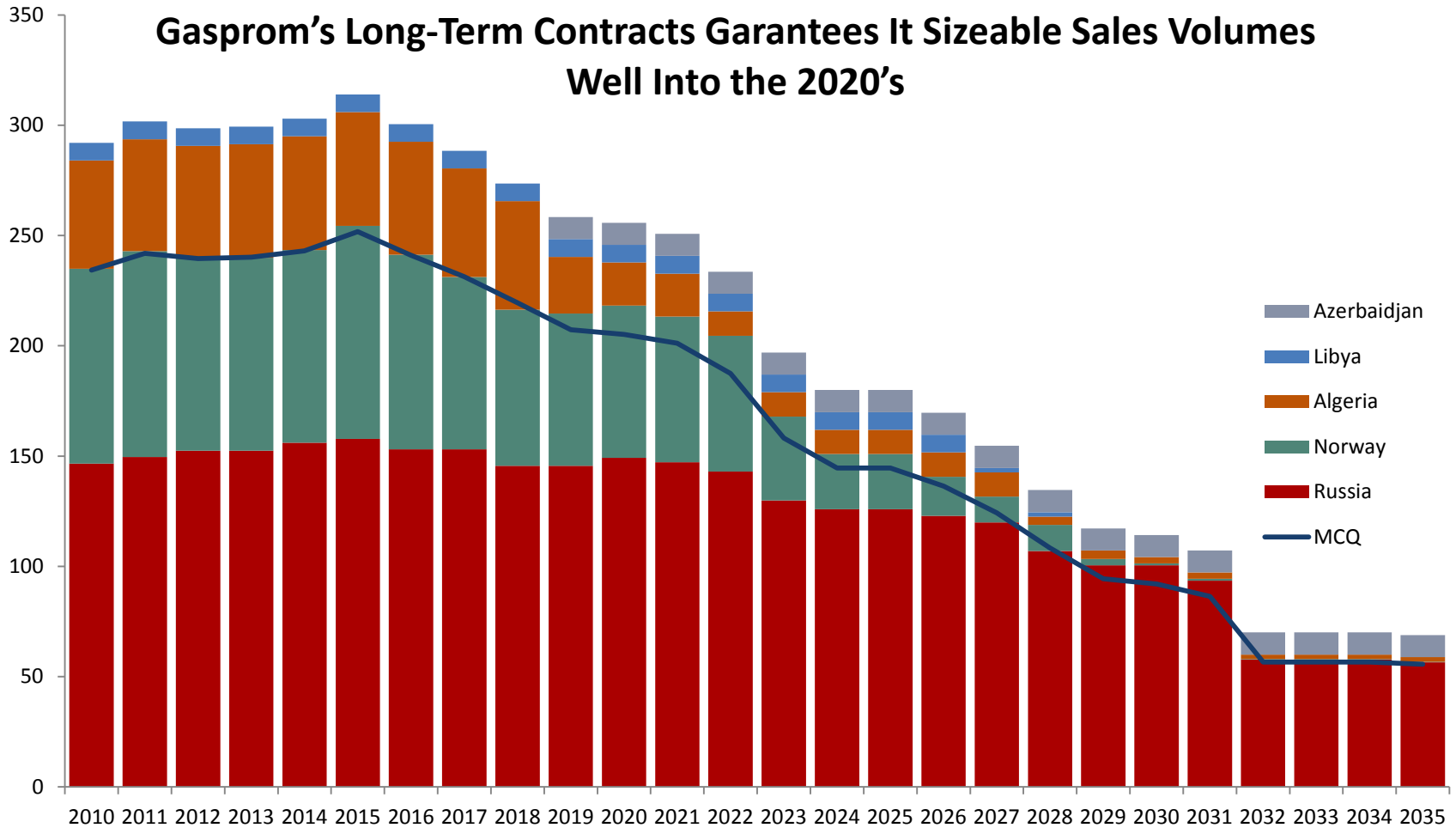


Pipeline imports* vs contracts (ACQ-bcm)

* From outside EU28



The phasing out of EU28 import contracts (bcm)

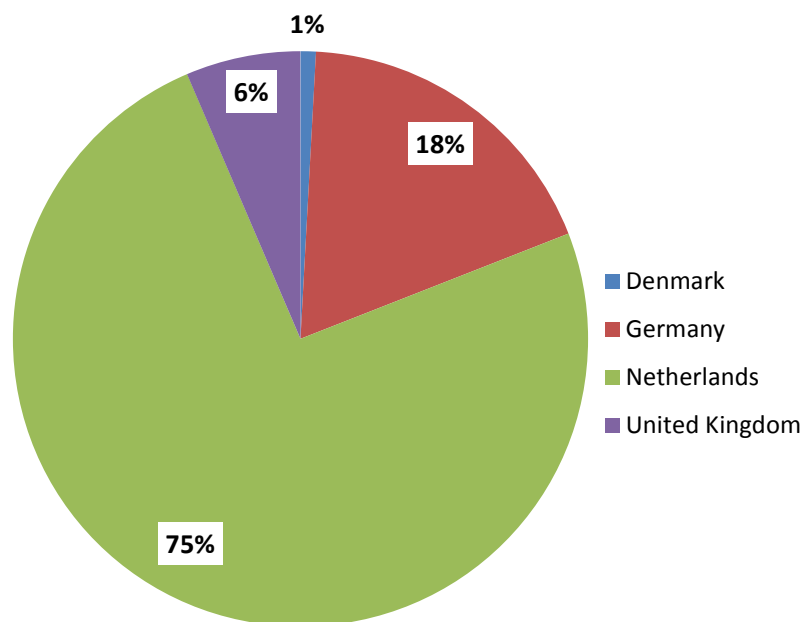


Source: Cedigaz LT Contracts Database

Intra EU28 contracts

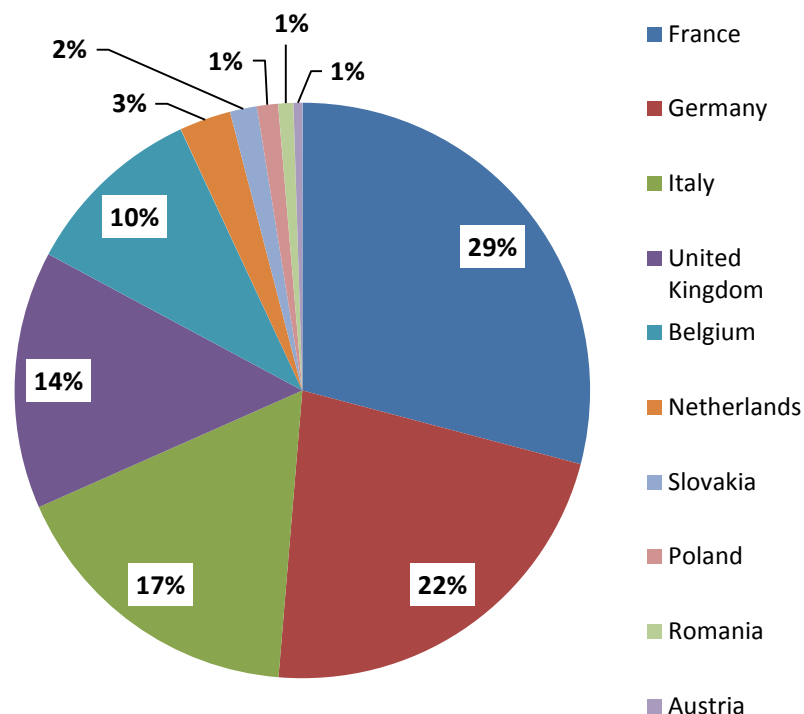
Around 58 bcm (ACQ) in force in 2016

Share by exporting country



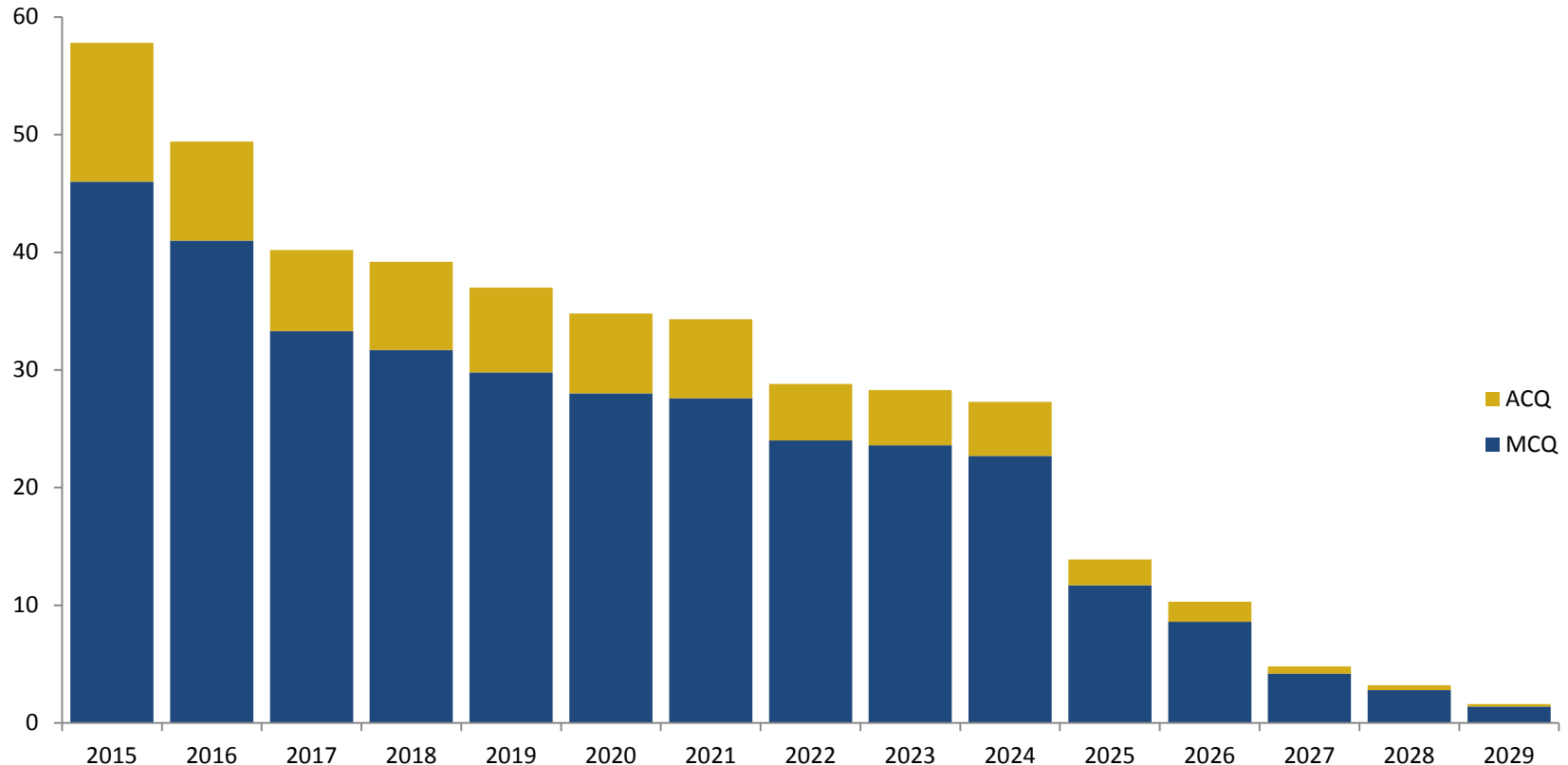
Source: Cedigaz LT contracts database

Share by importing country



Source: Cedigaz LT contracts database

The phasing out of Dutch contracts (bcm)



Source: Cedigaz LT Contracts Database, Dutch Government, Cedigaz Analysis

Cedigaz LT Gas Supply Contracts by Pipeline in Europe Database



Pipeline Gas Supply Contracts
Source: Cedigaz

Exporting Country	Seller	Buyer	Country	Delivery point	Signed	Plateau volume	Minimum TOP (Mm m³/yr)	First delivery	Expiry date	Pipeline	Comments
Russia	Gasprom Export	Ena Gas/GWH/Cral	Russia	Danqueville	1958	6,3		2006	2027	Transgas	In 1968, OHY AG signed the first LT gas contract with Gasprom-Trade. Contract signed in June 1998.
Russia	Gasprom Export	Ena Gas/GWH/Cral	Russia & Herzegovina	Danqueville	1955	6,3		2004	2016		Gas from Skakb Drain II - 1160 km³ per year. Contract signed in 1998.
Norway	GFU	Statilil UK	United Kingdom	SI Fergus	1988	8,55		2013	2044		Contract signed in 1997.
Norway	DP-Ind Skakb Drain	Agip	Italy	Italian border	2013	8,75		2013	2044	Trans Adriatic Pipeline (TAP)	Gas from Skakb Drain II - 1160 km³ per year. Contract signed in 1997.
Russia	Gasprom Export	Qazqaz	Bulgaria			8,4		1993	2015		Contract signed in 1993.
Russia	OHY	Bayerwerk	Germany	Oberruppel	1959	8,2		1959	2018		Contract signed in 1959 for a 18-year period. New long-term contract signed on March 2015.
Norway	Statilil/Talal	Bard Gas Eireann	Ireland		1956	8,254				Friigg Pipeline in SI Fergus and UK grid in Scotland in Ireland	Contract signed in 1956 for the purchase of gas from the Friigg pipeline.
Russia	Gasprom Export	IHA	Bulgaria		2012	2,3	80%	2012	2022		Contract signed in 2012 for the purchase of gas from the IHA pipeline.
Russia	Gasprom	IHA	Croatia		1992	1,2		1992	2015		Contract signed in 1992 for the purchase of gas from the IHA pipeline.
Russia	Transgas (via Dalmat. BOTAS)		Turkey	Hatibag (Bulg./Turk. Border)	1998	4		1998	2022		Contract signed in February 1998 for 14 years. Contract signed in February 1998 for 14 years.

Import contracts in Europe EU 28 + plus Bosnia&Herzegovina, Macedonia, Norway, Serbia, Switzerland, Turkey

137 contracts in force or coming into force from now to 2020

- ✓ Exporting country, Seller
- ✓ Importing country, Buyer
- ✓ Date of signature (115), First delivery (125), Expiry date (126)
- ✓ Plateau volume (131), Minimum TOP (13 contracts represent 30% of total contracted volumes)
- ✓ Pipeline (95)
- ✓ Comments (122)

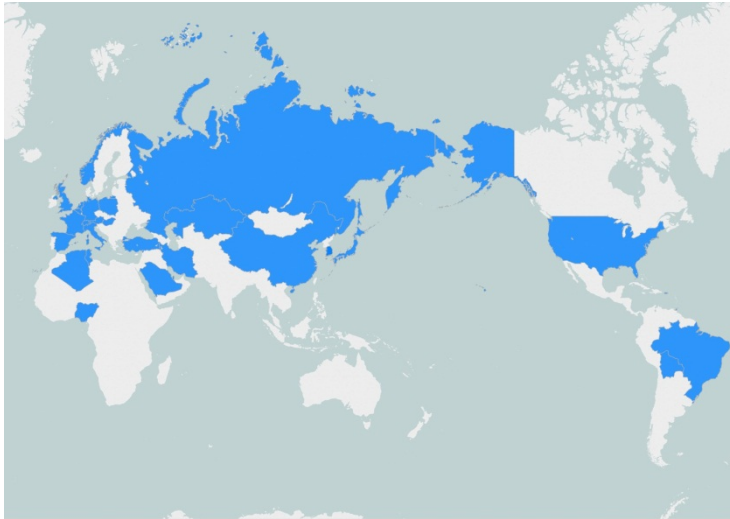
Bracketed figures are relative to the number of contracts informed populated

Available to Cedigaz Members, price for non-members: €3,000





CEDIGAZ, the International Association for Natural Gas



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About CEDIGAZ

CEDIGAZ is an international association dedicated to natural gas information and has more than 90 members in 40 countries. CEDIGAZ data has been the industry's reference since its foundation in 1961.

