The emergence of a new global gas leader

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IGU President
Turkmenistan: at the heart of the new strategic core area for gas supplies to Europe and Asia
Turkmenistan: the fourth largest world gas reserves

Source: BP Statistical Review 2012

<table>
<thead>
<tr>
<th></th>
<th>2001 tcm</th>
<th>2010 tcm</th>
<th>2011 tcm</th>
<th>share of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Russian Federation</td>
<td>42.4</td>
<td>44.4</td>
<td>44.6</td>
<td>21.4%</td>
</tr>
<tr>
<td>2 Iran</td>
<td>26.1</td>
<td>33.1</td>
<td>33.1</td>
<td>15.9%</td>
</tr>
<tr>
<td>3 Qatar</td>
<td>25.8</td>
<td>25.0</td>
<td>25.0</td>
<td>12.0%</td>
</tr>
<tr>
<td>4 Turkmenistan</td>
<td>2.6</td>
<td>13.4</td>
<td>24.3</td>
<td>11.7%</td>
</tr>
<tr>
<td>5 US</td>
<td>5.2</td>
<td>8.2</td>
<td>8.5</td>
<td>4.1%</td>
</tr>
<tr>
<td>6 Saudi Arabia</td>
<td>6.5</td>
<td>8.0</td>
<td>8.2</td>
<td>3.9%</td>
</tr>
<tr>
<td>Total World</td>
<td>168.5</td>
<td>196.1</td>
<td>208.4</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
Global gas demand (IGU/IHS CERA 2012 study)

Source: IGU, IHS CERA.
Gas share of the global primary energy consumption
(IGU/IHS CERA 2012 study)
Natural gas and LNG trade by region 2010-2035 (Bcm/year)  

**Source:** IEA

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**IGU**  
**INTERNATIONAL GAS UNION**  
**UNION INTERNATIONALE DU GAZ**
Major pipeline gas and LNG trades in 2012

Source: BP Statistical Review

Source: Includes data from Cered, C/Stat, GIG, and Waterborne.
Export routes of natural gas from Turkmenistan

Source: Turkmengas

- Length of a gas pipeline Turkmenistan-China of 7000 km
- Annual deliveries of gas to China of 40 billion m² in a year
- Annual deliveries of gas to Iran of 14 billion m² in a year
The East-West intra-Turkmenistan gas pipeline

Source: Turkmengas

**EAST-WEST:**
- Length of a gas pipeline of 800 km
- Annual deliveries of gas to East-West of 30 billion m² in a year
The main export pipeline projects to Western Europe

Source: AIE

Turkmenistan presentation May 2013
Nabucco, a Western route option for Caspian gas
The Trans-Caspian gas pipeline project
Source: Turkmengas

TRANS-KASPIAN:
- Length of a gas pipeline of 269 km
The TAPI export pipeline project

Source: Turkmengas

TAPI:
- Length of a gas pipeline of 1735 km
- Annual deliveries of gas to TAPI of 30 billion m³ in a year