

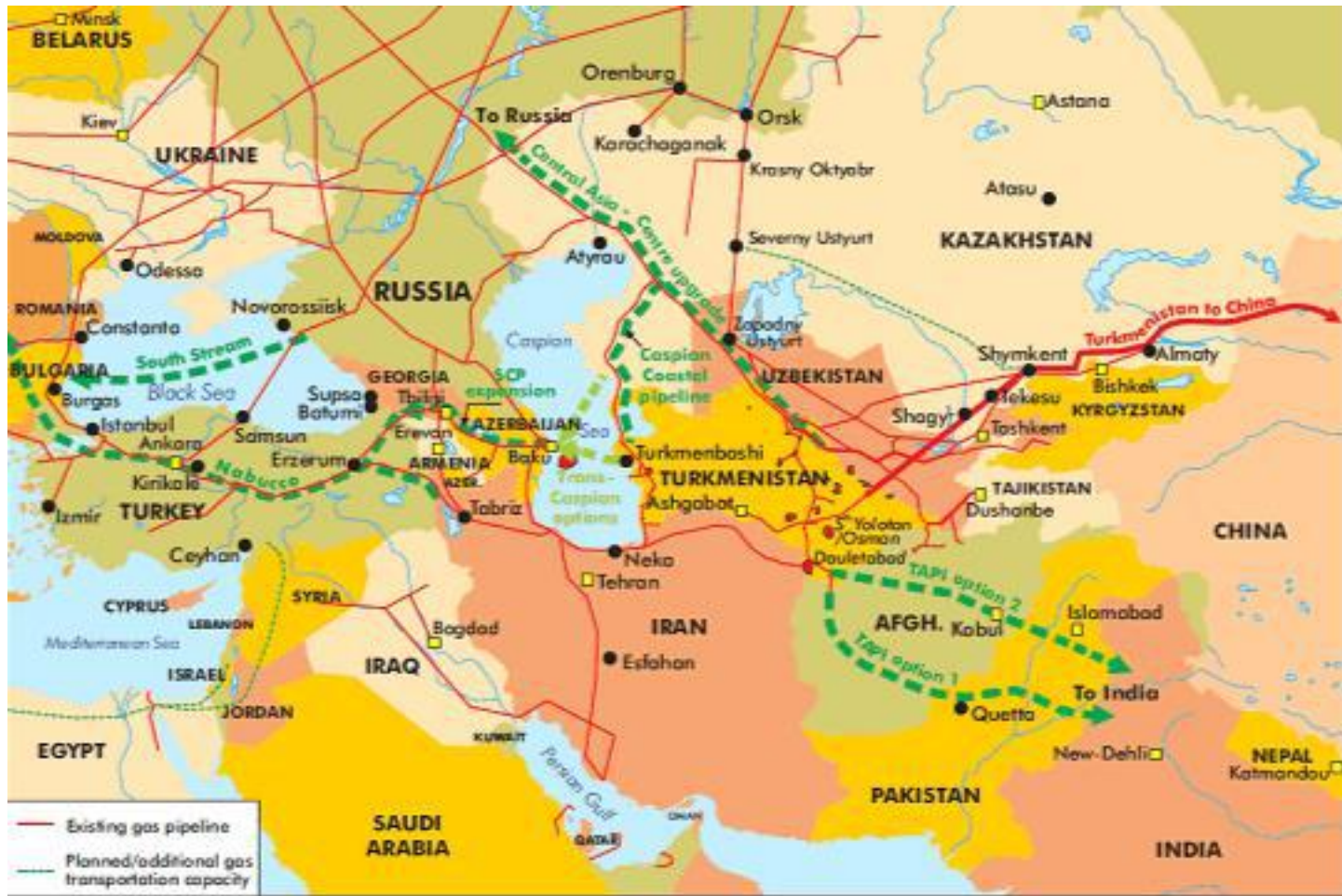
# Turkmenistan Gas Congress 2013

21 Tuesday May 2013

*The emergence of a new global gas leader*

Jérôme Ferrier  
IGU President

# Turkmenistan: at the heart of the new strategic core area for gas supplies to Europe and Asia

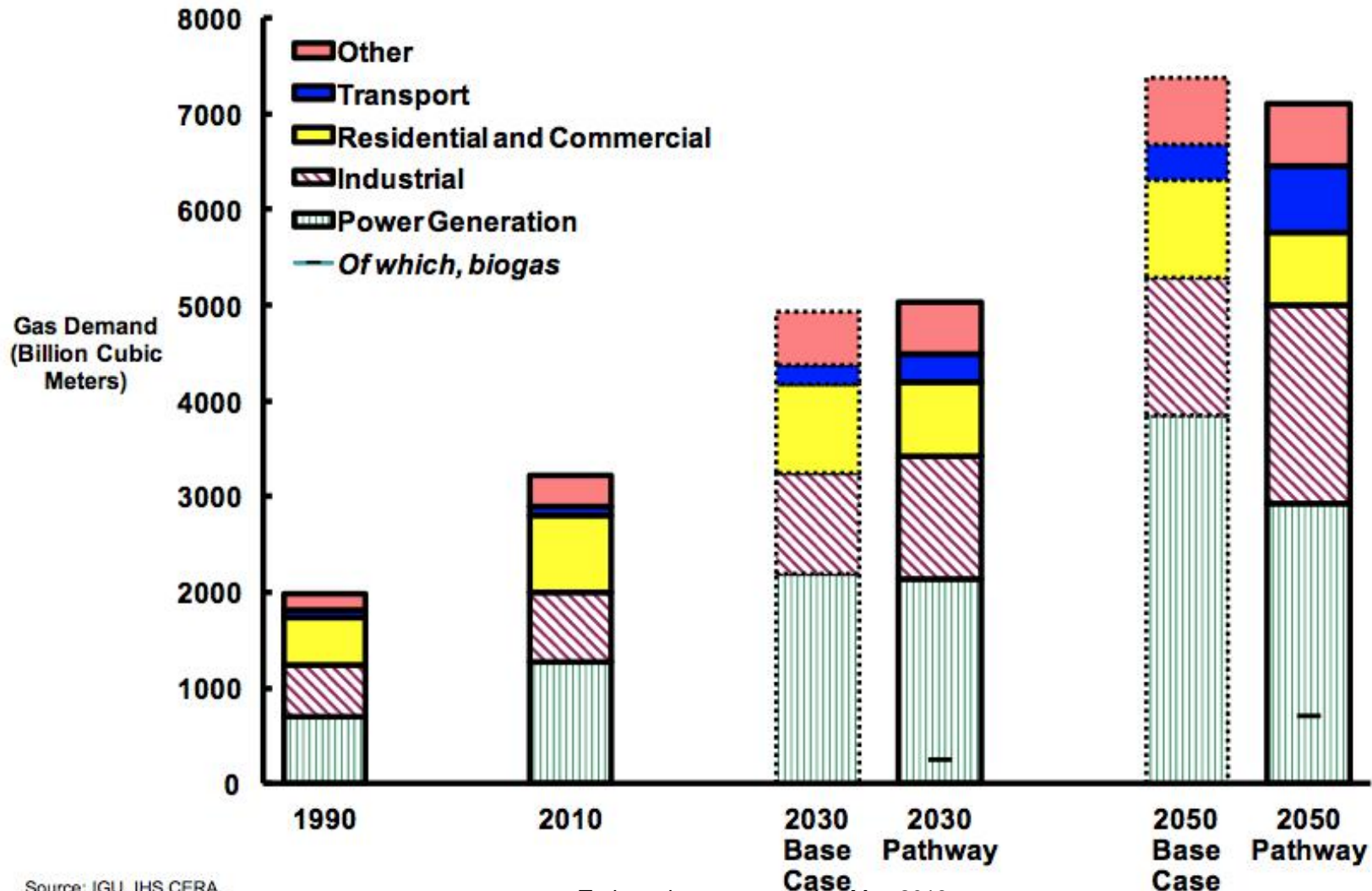


# Turkmenistan: the fourth largest world gas reserves

Source: BP Statistical Review 2012

		2001	2010	2011	
		tcm	tcm	tcm	share of total
1	Russian Federation	42.4	44.4	44.6	21.4%
2	Iran	26.1	33.1	33.1	15.9%
3	Qatar	25.8	25.0	25.0	12.0%
4	Turkmenistan	2.6	13.4	24.3	11.7%
5	US	5.2	8.2	8.5	4.1%
6	Saudi Arabia	6.5	8.0	8.2	3.9%
Total World		168.5	196.1	208.4	100.0%

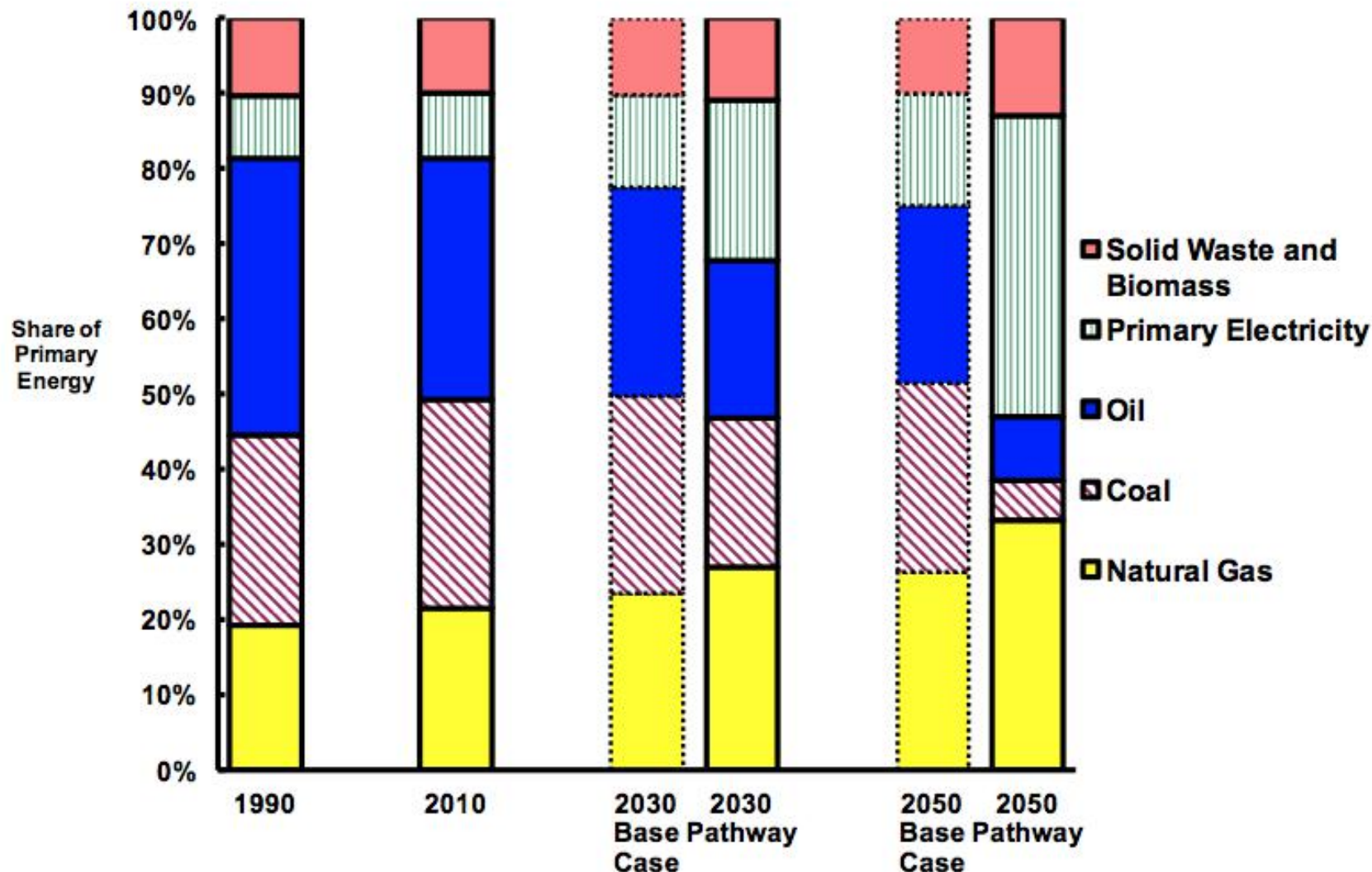
# Global gas demand (IGU/IHS CERA 2012 study)



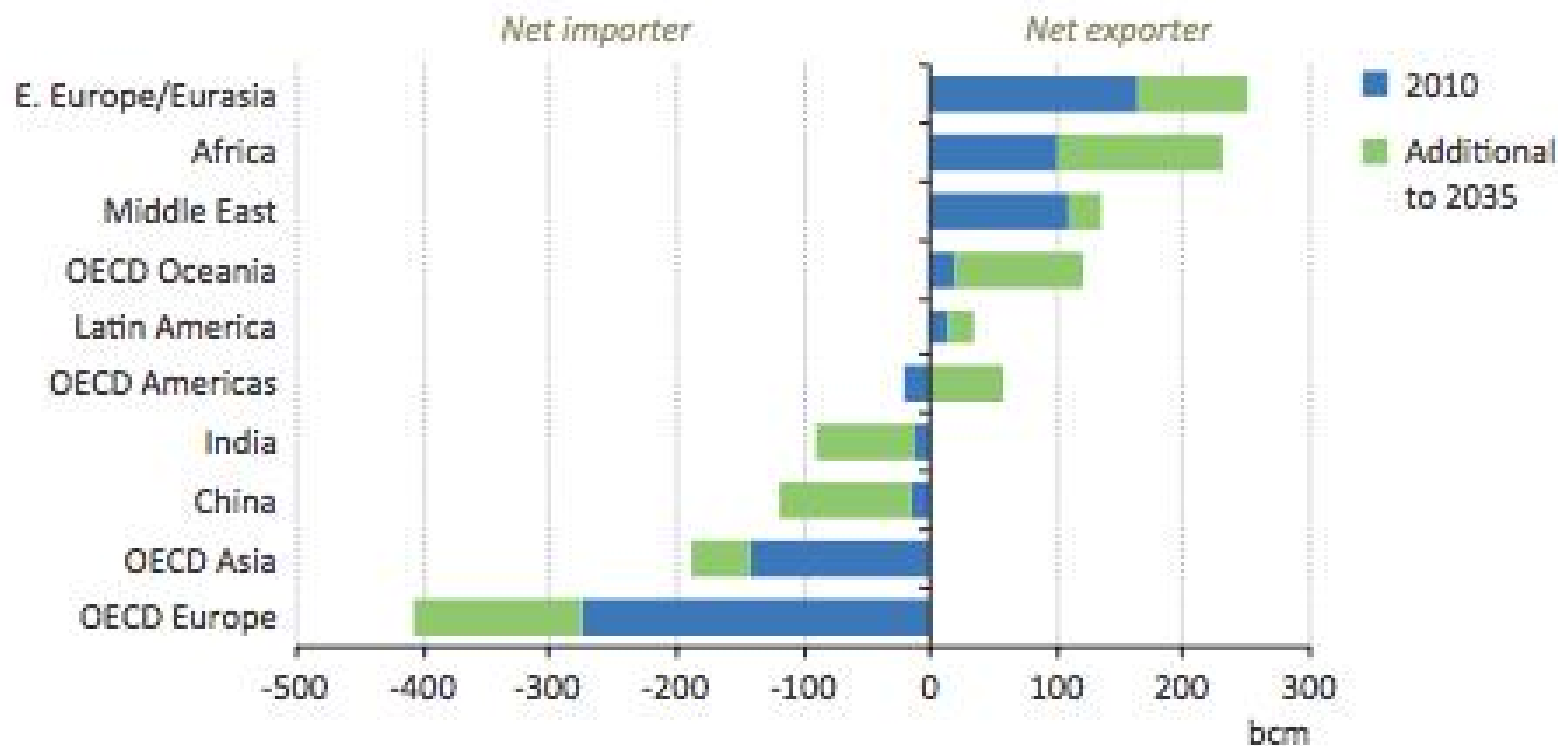
Source: IGU, IHS CERA.

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# Gas share of the global primary energy consumption (IGU/IHS CERA 2012 study)

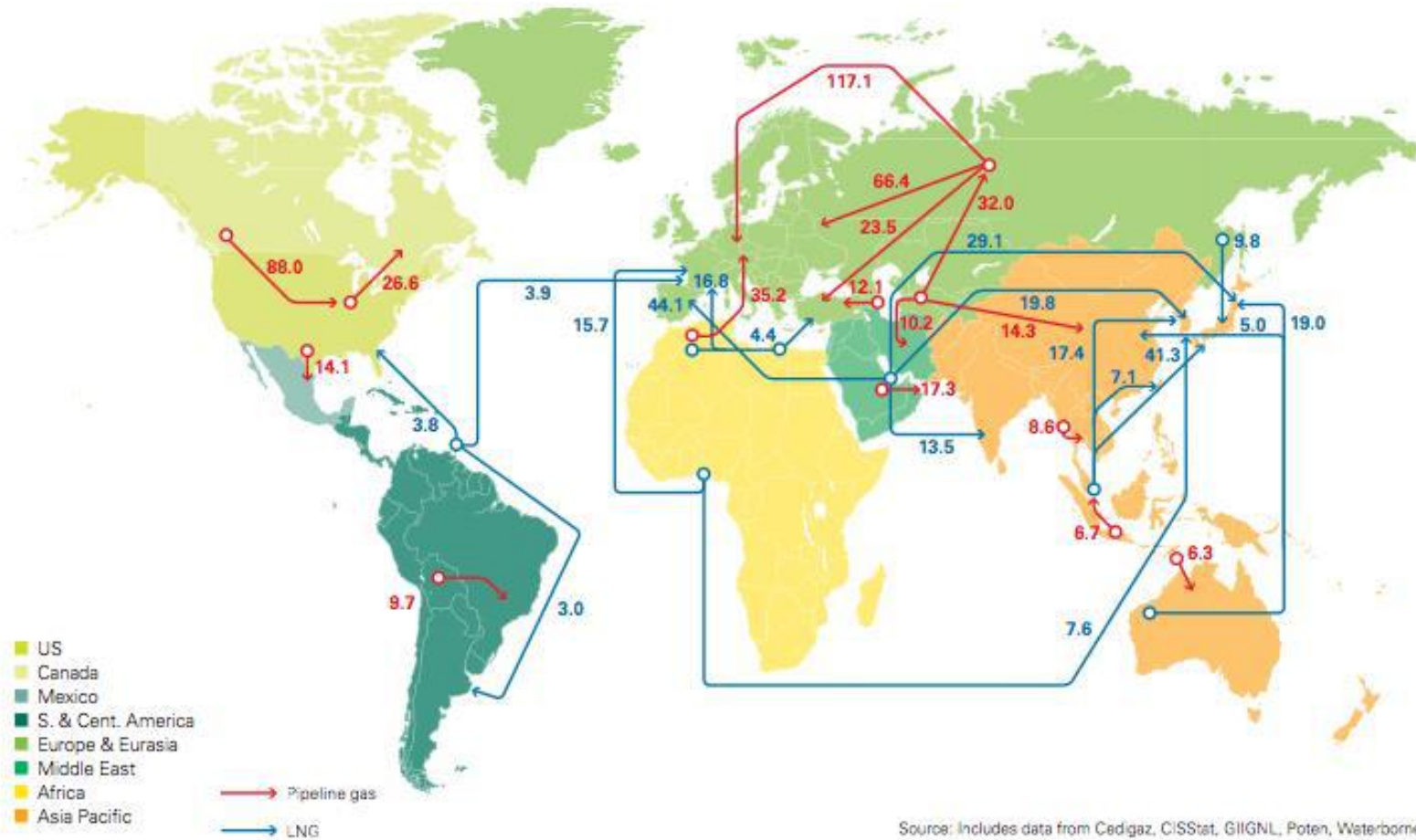


# Natural gas and LNG trade by region 2010-2035 (Bcm/year) Source: IEA



# Major pipeline gas and LNG trades in 2012

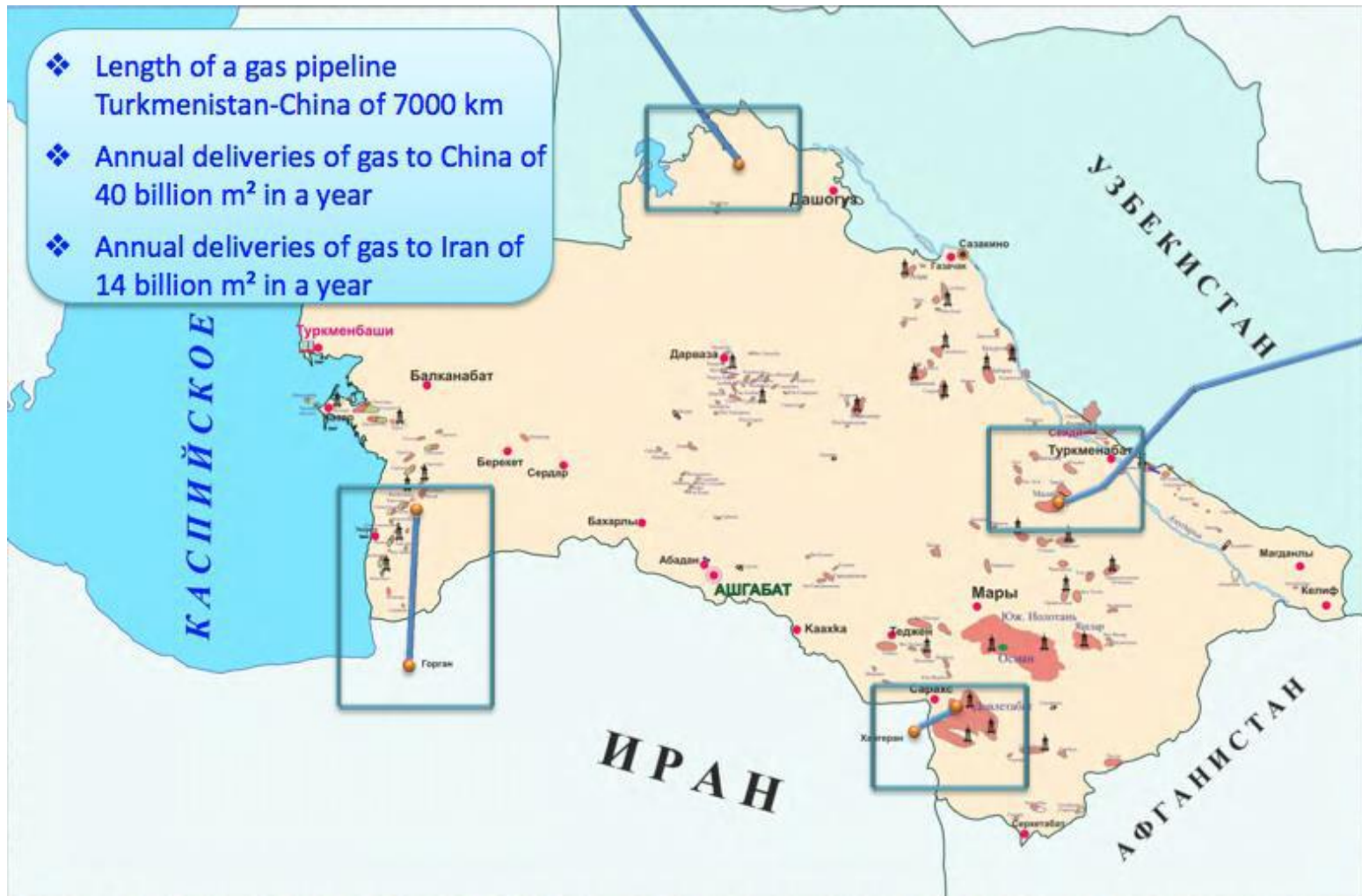
Source: BP Statistical Review



Source: Includes data from Cedigaz, CISStat, GIIGNL, Poten, Waterborne.

# Export routes of natural gas from Turkmenistan

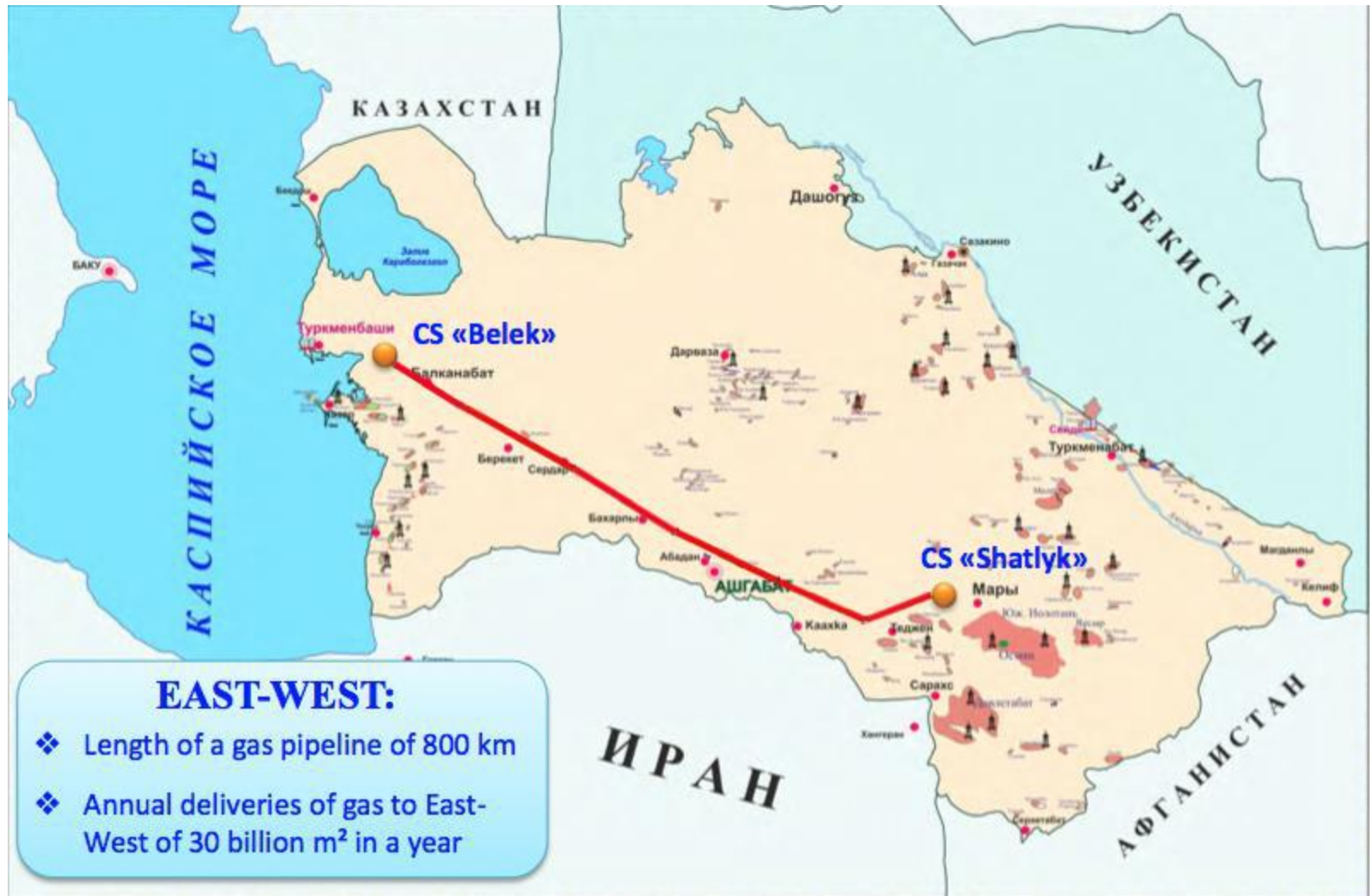
Source: Turkmengas





# The East-West intra-Turkmenistan gas pipeline

Source: Turkmengas



# The main export pipeline projects to Western Europe

Source: AIE



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# Nabucco, a Western route option for Caspian gas



# The Trans-Caspian gas pipeline project

Source: Turkmengas



# The TAPI export pipeline project

Source: Turkmengas

