



25th world gas conference
"Gas: Sustaining Future Global Growth"

Analysis of Structure and Dynamics of Natural Gas Industrial Consumption

Market situation, the study of the Working Committee 5

By: Alexey Zorya, JSC «Gazprom promgaz»

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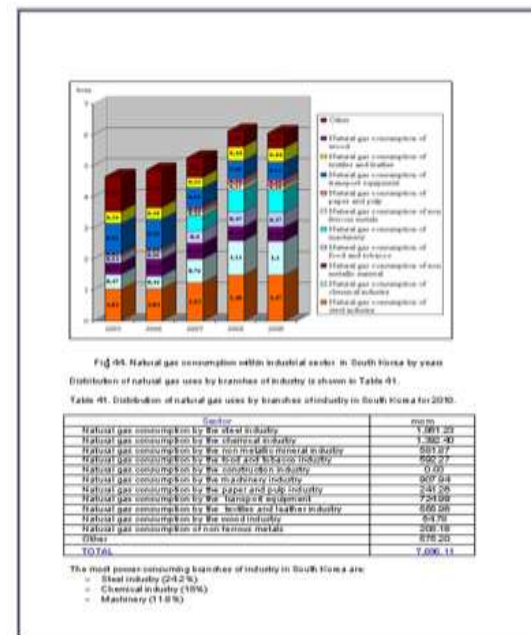
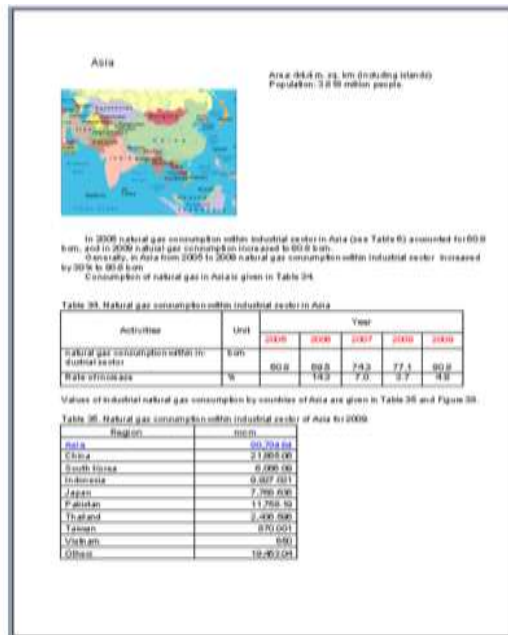


The study had the following aims:

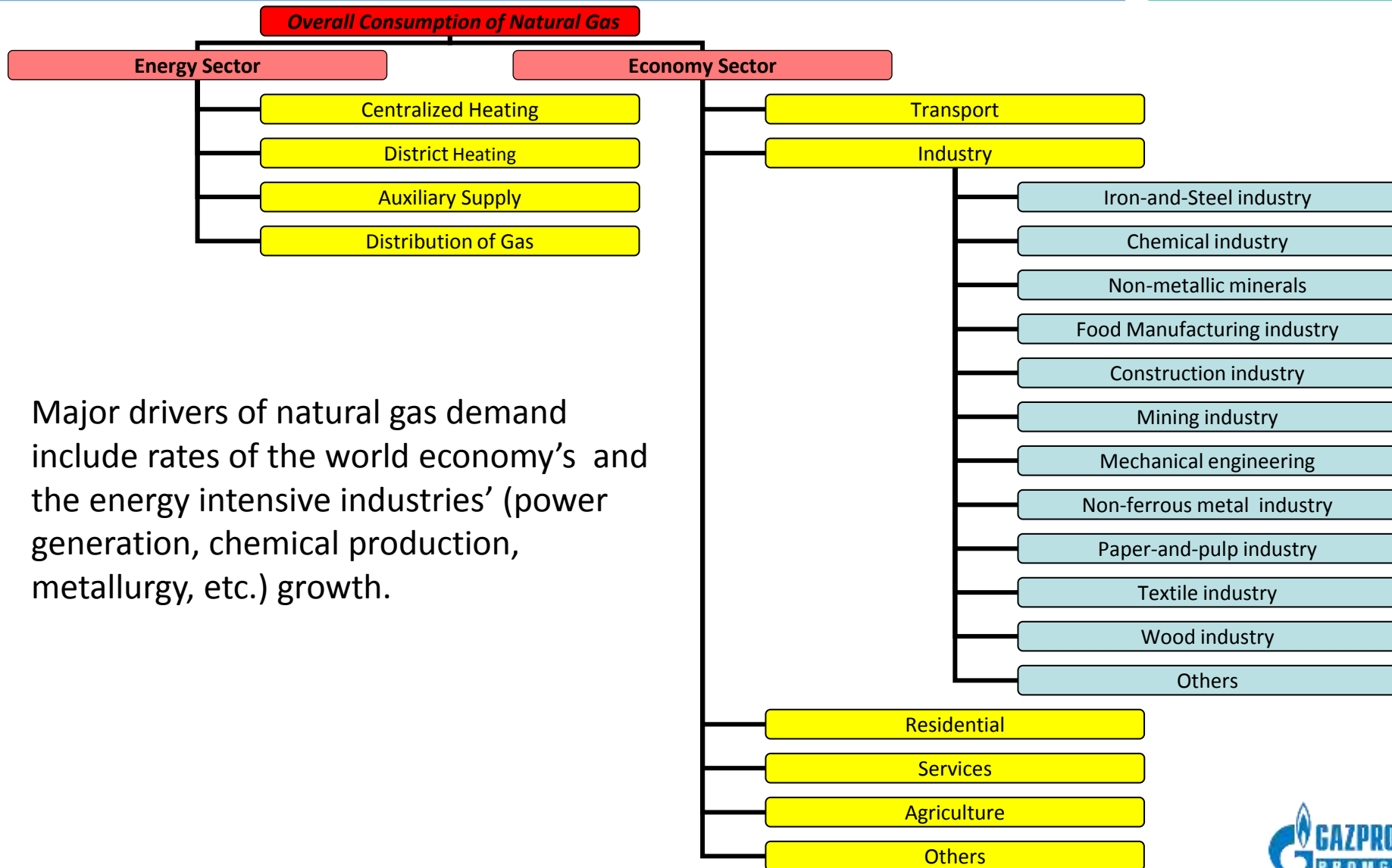
- to compile and analyze information on natural gas consumption within industrial sector across different countries;
- to analyze the structure and dynamics of natural gas consumption within industrial sector over the last 5 years;
- to compare structure and dynamics of natural gas consumption in various countries, accounting for economic, technological and other influencing factors;
- to outline principal measures aimed at enhancing efficiency of natural gas industrial use.

Report structure

1. Introduction
2. Natural gas consumption in the world
3. Natural gas industrial consumption by regions of the world
4. Dynamics and trends of certain indices related to industrial consumption of natural gas
5. Measures facilitating enhanced efficiency of natural gas industrial use
6. Conclusion



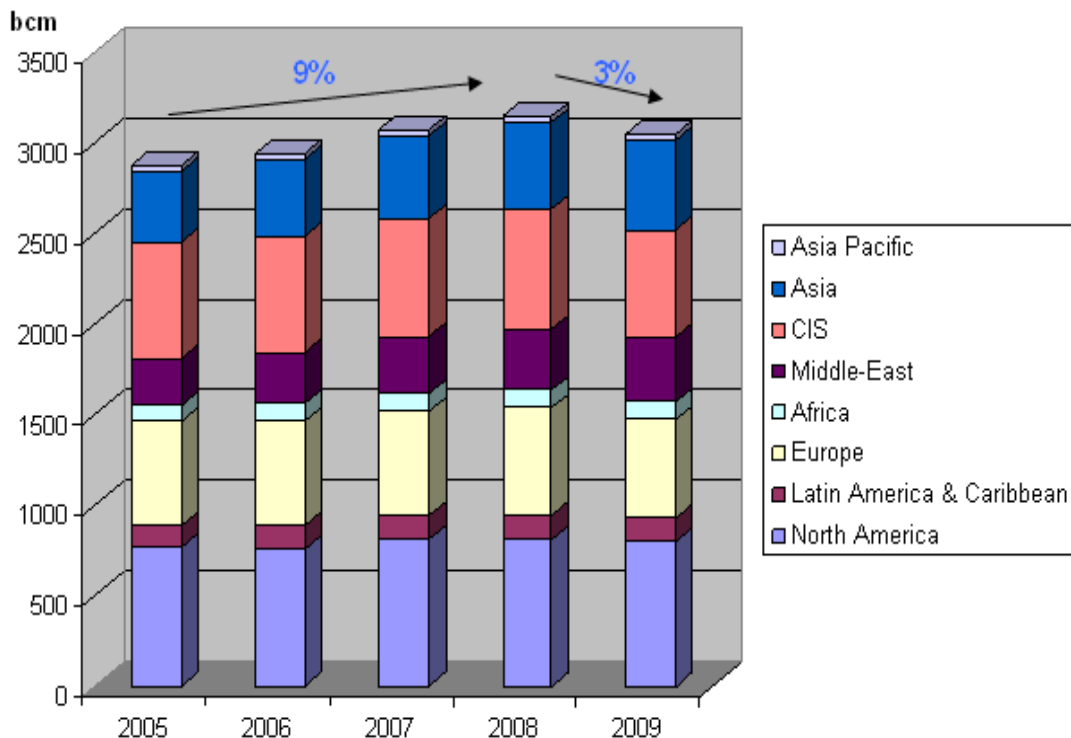
Natural gas consumption structure



Major drivers of natural gas demand include rates of the world economy's and the energy intensive industries' (power generation, chemical production, metallurgy, etc.) growth.

Natural gas consumption in the world

Natural gas consumption by regions of the world

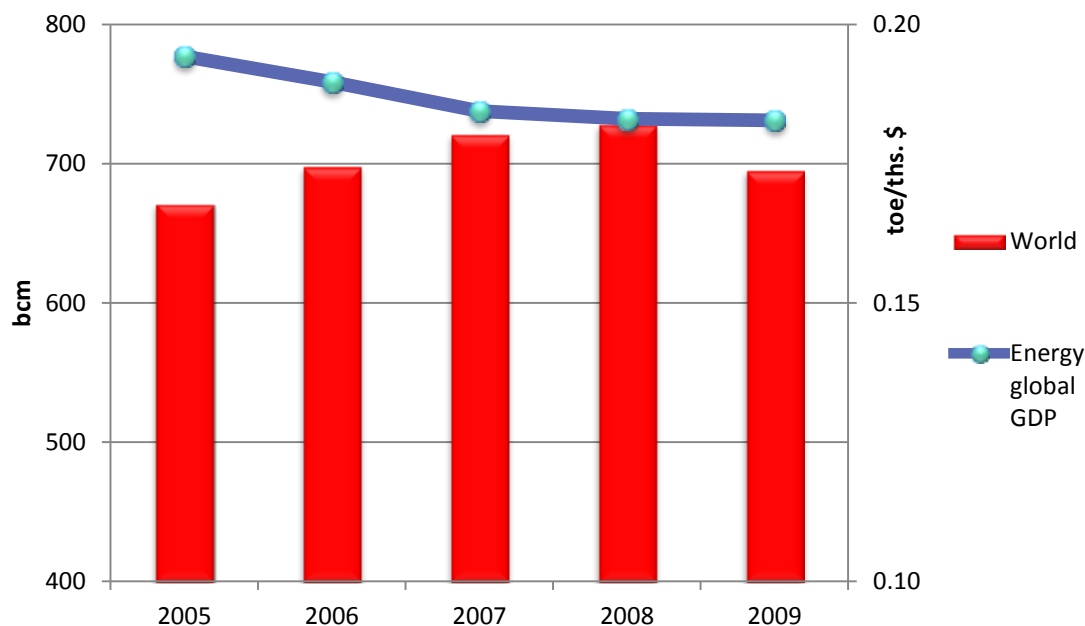


Environmental, economic and technological advantages of gas predetermine high demand for it in the future. Under different estimations gas consumption will be annually increasing worldwide at the rate of 2,5–3%.

Dynamics of natural gas consumption in the world for 2005-2009

Natural gas consumption	Unit	Year				
		2005	2006	2007	2008	2009
World	bcm	2871.8	2937.2	3072.1	3148.5	3052.5

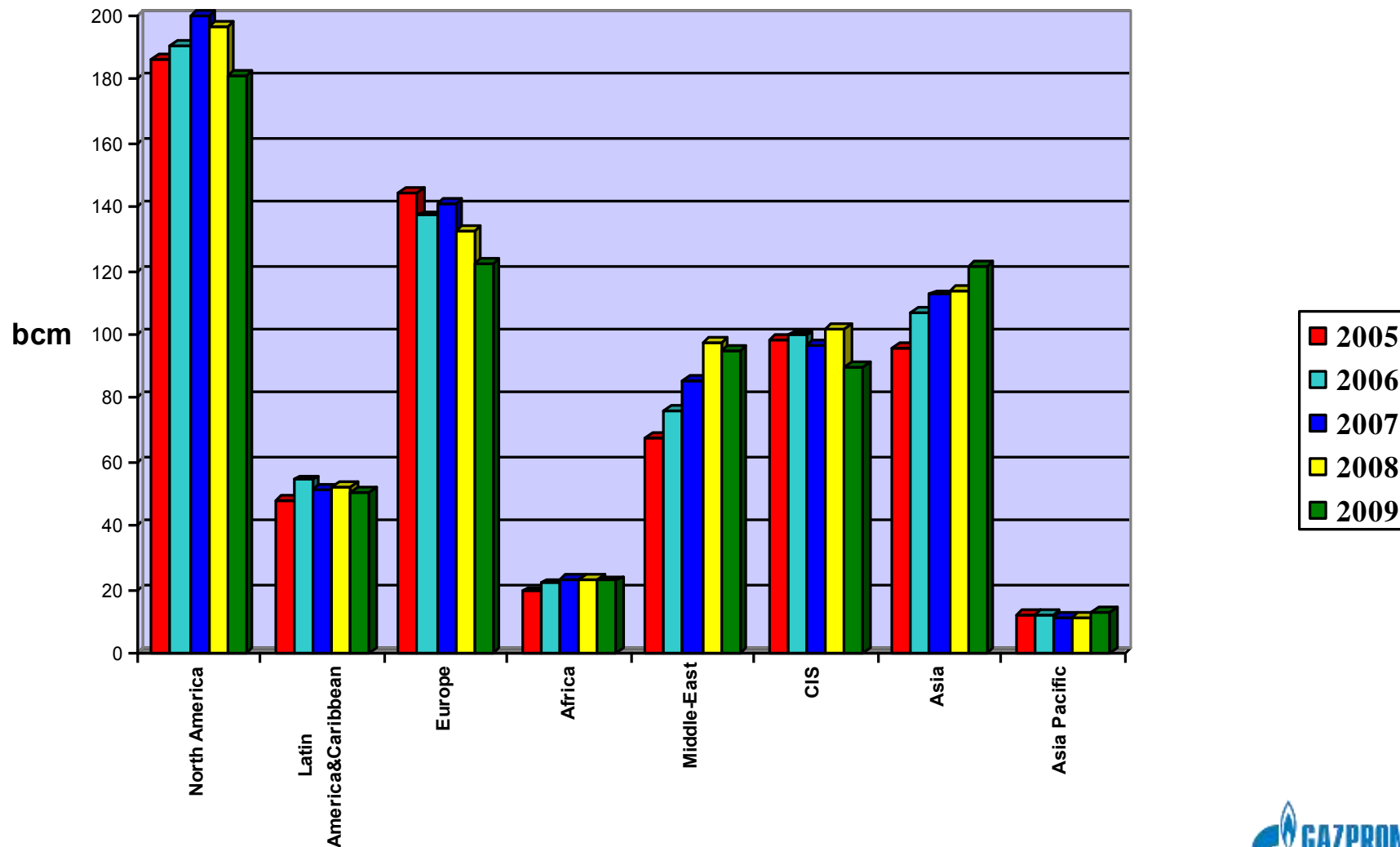
Dynamics of natural gas consumption within industrial sector in the world



Natural gas consumption within industrial sector from 2005 to 2009 on average accounts for about 23% of the world natural gas consumption.

In total, from 2005 to 2009 natural gas industrial consumption increased by 3.5%, which accounts for 23.8 bcm.

Natural gas consumption within industrial sector by regions of the world



Industrial sector natural gas consumption by regions of the world, bcm

	Year					Growth rate (+), Decline rate (-), %
	2005	2006	2007	2008	2009	
North America	186.6	190.6	99.6	196.3	180.8	- 3
Latin America & Caribbean	47.7	54.3	1.3	52.5	50.4	+5
Europe	144.1	137.1	40.8	132.7	122.1	- 15
Africa	19.3	21.8	3.0	22.9	22.7	+15
Middle-East	67.6	75.8	5.5	97.1	94.6	+28.5
CIS	98.1	99.6	6.9	101.4	89.9	- 8
Asia	95.9	106.9	12.4	113.4	121.6	+21
Asia Pacific	11.8	11.7	1.3	11.4	12.8	+8

The regions of the world can be divided into 2 groups:

Regions with a trend to reduction in gas consumption:

- North America (by 3%),
- Europe (by 15%),
- CIS (by 8%).

Regions with an upward trend in gas consumption:

- Latin America&Caribbean (by 5%),
- Africa (by 15%),
- Middle East (by 28.5%),
- Asia (by 21%),
- Australia (by 8%).

General industrial measures:

- energy survey: an energy audit of an entire industrial enterprise, as well as an inspection of a single unit or production operation.
- energy management: planning, management, control of energy flows and energy resources balance to optimize and enhance enterprise energy efficiency.
- goal-oriented energy monitoring.
- policy of continual (or frequent enough) operational diagnostics of the heat and power status of a facility by means of a specialized transportable complex.
- establishment of programmes and checklists for energy supply to a single unit.

Thank you for your attention!