

swede
gas



Swedegas



Swedegas' vision

“Swedegas is leading a responsible development of the Swedish gas market.

We create sustainable and reliable solutions for energy supply. We invest in infrastructure to the benefit of employment, environment and growth.

By 2020, 20 % of the energy transported in Swedegas' infrastructure shall be renewableand by 2050 100 %”.



Swedegas – a key player in the Swedish Gas Market

- Invests in infrastructure for gas
- Owns and maintains the Swedish transmission system for gas (620 km)
- Transports gas to distributors and end users
- Looks for synergies between existing gas grid and new energy gases such as biogas and LNG
- Certified TSO (2012)
- System Balancing Administrator (2013)

Established	1976
Yearly transport	1,0 – 1,6 bcm
Employees	35
Owner	EQT Infrastructure



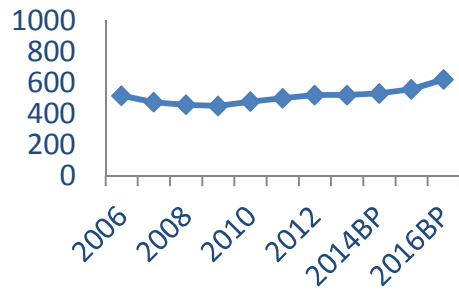
The Swedish Gas Market - three segments

Industry



- Mainly as feedstock in process industry
- 50 % of total volume 2012

Volumes (MNm³)

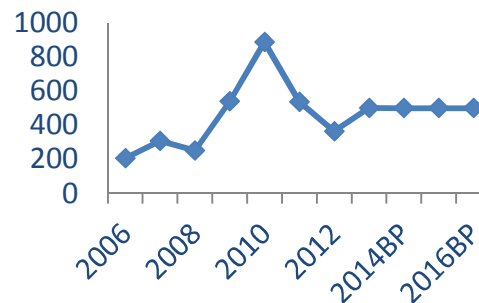


CHP



- Production of heat and power
- 35 % of total volume 2012 (of which 70 % from two plants)

Volumes (MNm³)

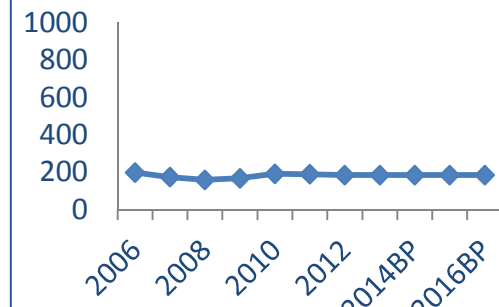


Miscellaneous



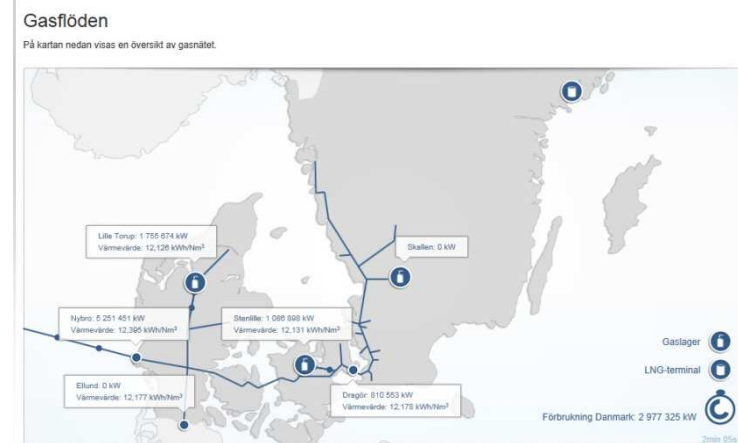
- Facilities heating, vehicles
- 15 % of total volume 2012

Volumes (MNm³)



Supply to the Swedish market

- Vulnerable supply situation...
 - All supply is through Denmark and exit point Dragör
 - DK, SE show the lowest flexibility when facing High Daily Demand conditions in January (ENTSOG* TYNDP** 2013)
 - Danish North Sea production is expected to fall steeply as from end of this decade
- ...but on-going investments will secure supply many years ahead
 - Strengthened capacity from DE to DK as from 2016 to diversify supply
 - Capacity from DE will be scalable if required
 - Any large scale biogas injections and LNG connections to the transmission grid will also support SoS



AKTUELLT

100% förnybar gas i svenska gasnätet 2050

Ny tioårsplan för utveckling av gasnät i Europa

Investeringar i europeisk energinfrastruktur gynnar svensk industri

Gör biogas av elöverskott från vindkraft

Sjöfart och industri redo att investera i LNG

Energigaserna – räddningen för industrin och miljön?

Regional utveckling i fokus nu

14 mars, 2013

Investeringar i europeisk energinfrastruktur gynnar svensk industri

I den europeiska energiomställningen spelar naturgas en allt viktigare roll. I Tyskland fahas kärnkraft och kol ut till förmån för mer miljövänliga energikällor som vind, sol och gas. De investeringar som nu görs i infrastruktur på kontinenten kommer också svensk industri tillgodo.

Den tyska nätoperatören Gasunie kommer att investera omkring 700 miljoner euro fram till 2016 då bland annat en förstärkt gasledning ska byggas till Ellund i Danmark.

- För svensk basindustri innebär detta att försörjningen av naturgas är tryggad. Många har gjort stora investeringar i sin omställning från oljebaserade processer till att använda gas och det är betryggande för dem att få veta att möjligheten att använda gas är säkerställd decennier framåt, säger Lars Gustafsson, VD Swedegas.

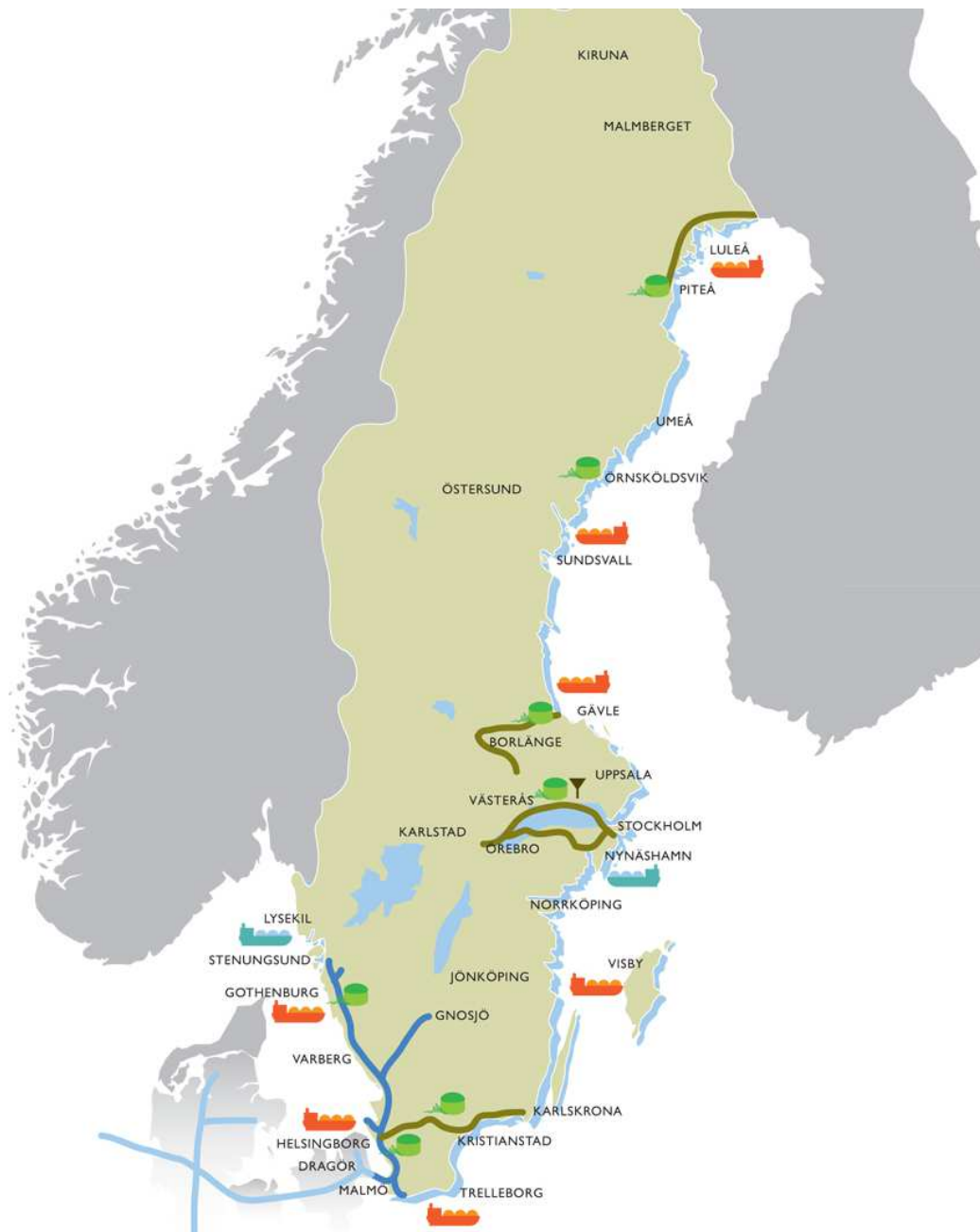
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Gas infrastructure – a key enabler

- Connects and integrates markets
- Open access for competition and customer choice
- Safe and reliable
- Efficient
- No need of land transports & invisible
- Flexible - Natural Gas and biogas can "travel" together
- Supports biogas development;
 - allows market access
 - no flaring
 - promotes biogas production



Efficient infrastructure for a well-functioning gas market



LNG Terminal in Gothenburg

- Swedegas, Vopak and the Port of Gothenburg are planning to open an LNG terminal in Gothenburg in 2015
- Environmental gains and competitive prices are driving up demand in industry, shipping and the transport sector.
- The LNG Terminal will be the first in Sweden to be based on the Open Access principle.
- From Gothenburg, LNG can be transported by rail and road to parts of Sweden that up to now have had limited or no access to natural gas.
- The terminal can also be connected to the gas grid.



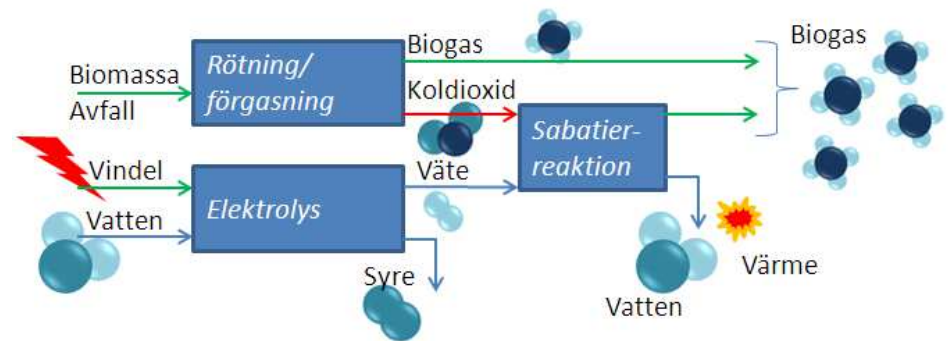
Local grids



Power to Gas

Wind power potential by 2020: 30 TWh

- "Windgas" can be;
 - Produced by excess electricity production from wind power
 - Stored in the gas grid
 - Used to boost biogas production potential



Policy makers to be encouraged of:

- Establishing a systems perspective of the future energy market
- Power to Gas Potential = Feasibility Study (WIP)
- Supporting a demonstration plant
- Constructing a supporting policy framework

- Energimyndigheten
- Energigas Sverige
- Energinet.dk
- E.On Gas Sverige
- GE Energy
- KTH
- O2
- Svensk Energi
- Svenskt Gastekniskt Center
- Swedegas**
- Swedish Biogas International
- Vätgas Sverige
- ÅF
- Öresundskraft