

Long live Gas!

The best is still to come ...

European Autumn Gas Conference, Brussels

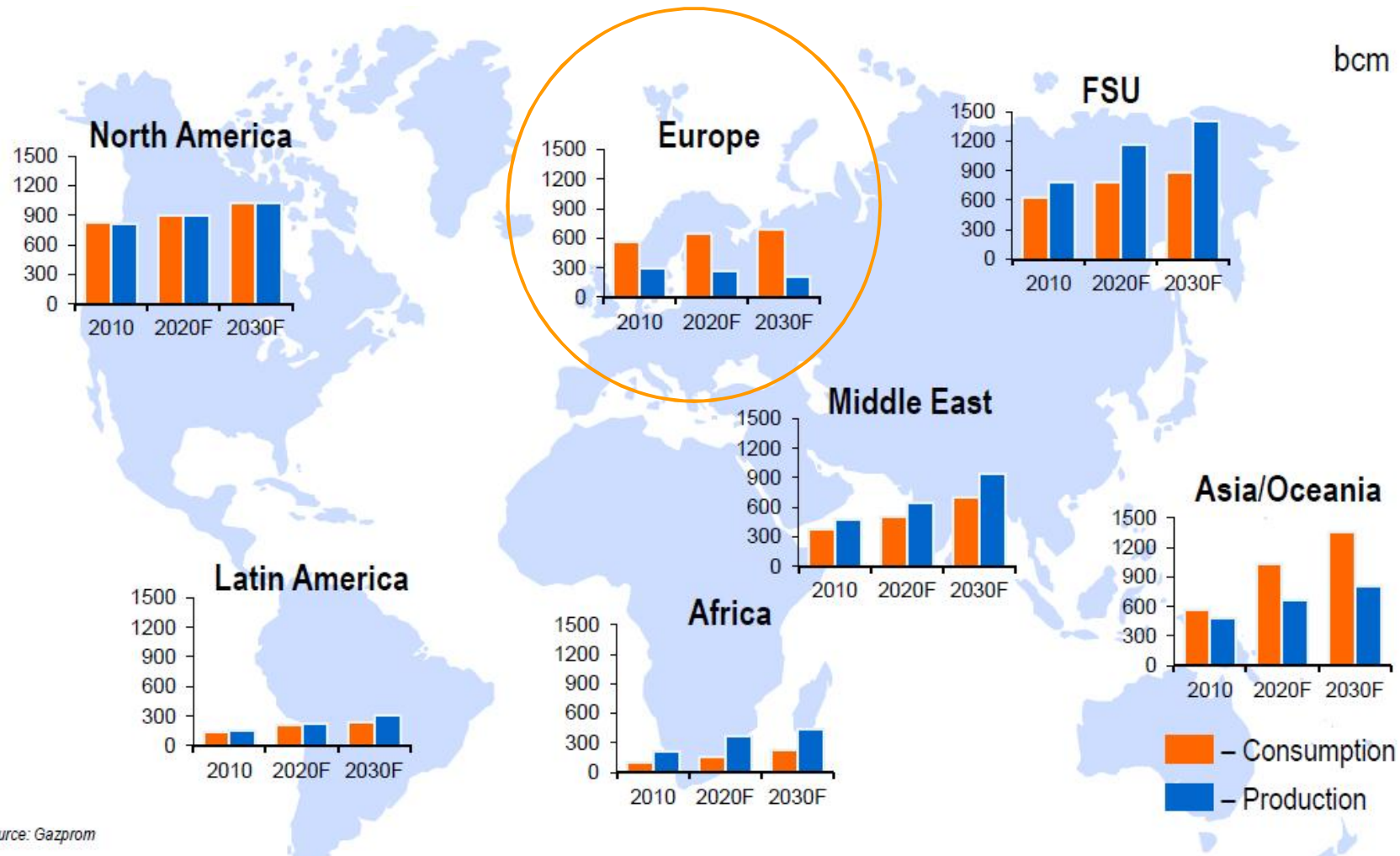
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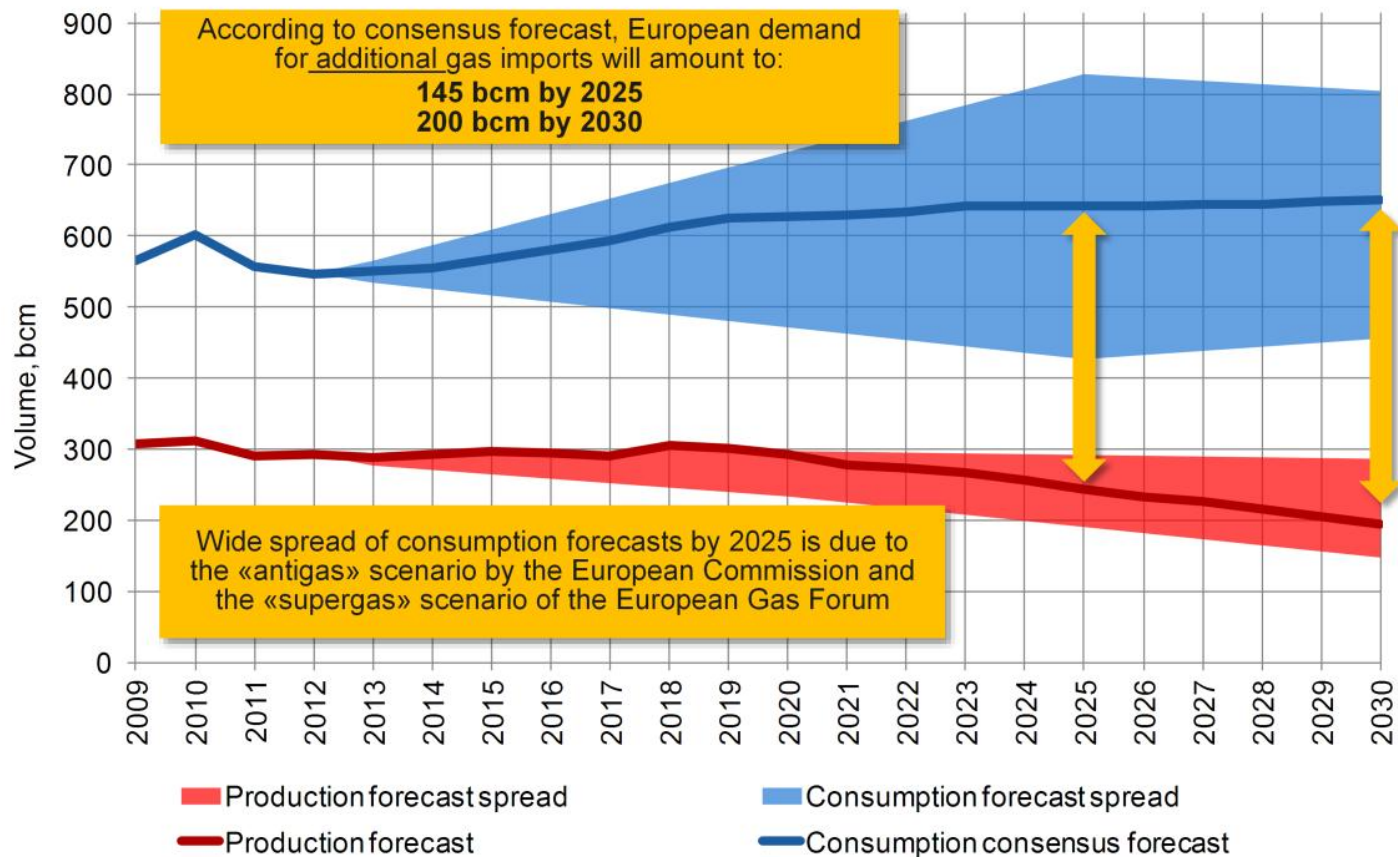
We believe that the outlook for natural gas is better than currently proclaimed.



Source: Gazprom

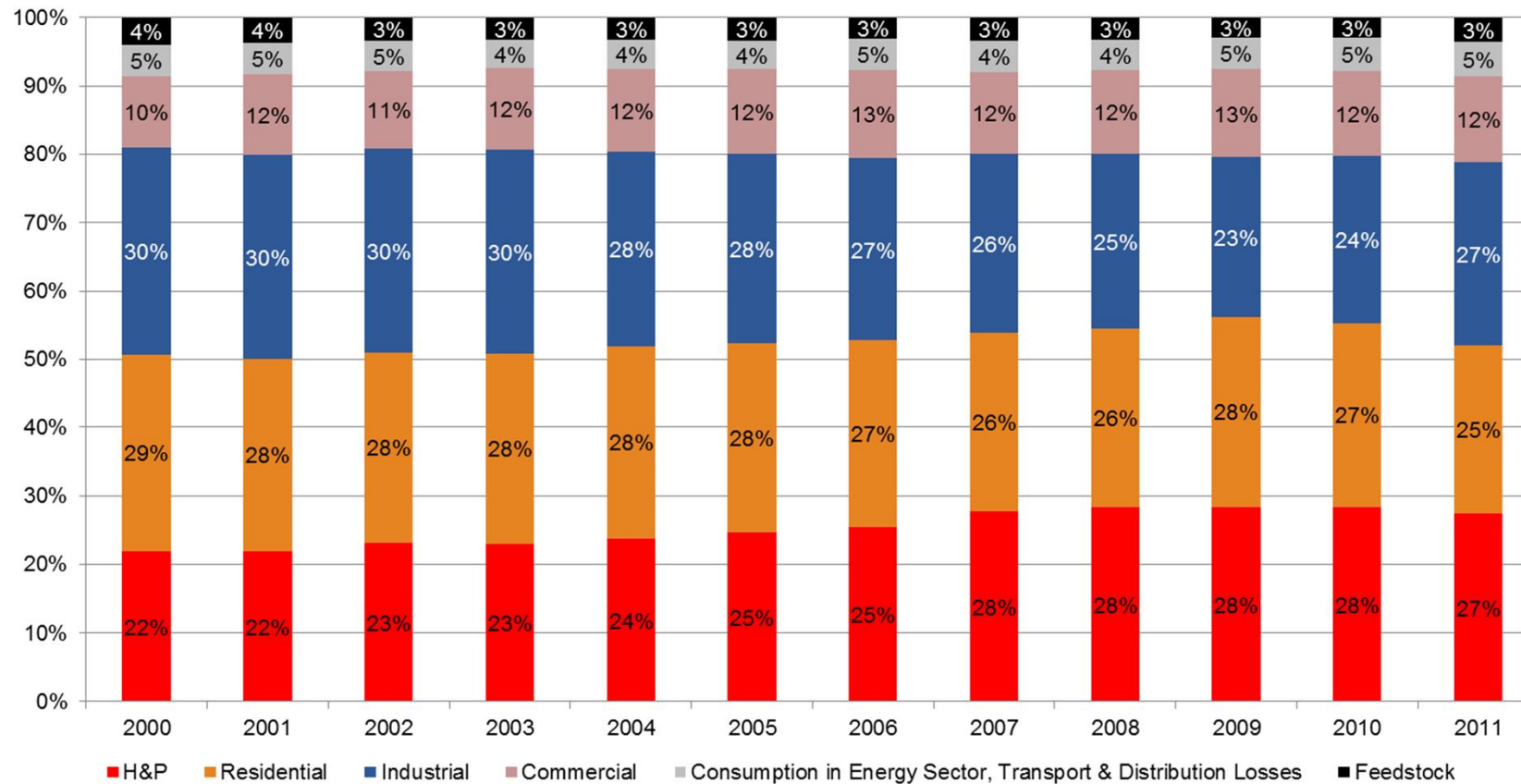
Europe remains a priority region for the GAZPROM Group!

Reduced indigenous production in Europe leads to higher demand of foreign gas.



Source: Gazprom, EC, EGF, etc.

European consumption - which segment provides the stimulus?



Source: Eurostat

European emissions reduction agenda drives development of alternative fuels



- EU-6 (2013/2014) drives development of CNG and LNG as fuel for light, medium and heavy-duty road transport (CO₂, NO_x, particulate matter)
- Automotive industry investing in CNG and LNG models to achieve EU-imposed average CO₂-fleet targets (120g CO₂/km by 2015 and 95g CO₂/km by 2020)
- Furthermore: Sulphur Emission Control Areas (SECA from 2015 in Baltic & North Sea) drive development of LNG as bunker fuel opposed to MGO or scrubber-technology (SO_x)



Natural gas for transport is an available and environmentally friendly solution to Europe's ambition to significantly reduce emissions.

Source: Gazprom, EC, EDF, etc.

Automotive industry invests in further development of NGVs



CNG – Natural gas compressed to 200 bar

Established and growing

- Proven technology available here and today
- Cars, light duty vehicles, busses & trucks available with new models being added
- Infrastructure exists or is developing



LNG – Natural gas liquefied by cooling down to -161 °C

New

- 2.5 x more energy in the same space
- Targets heavy duty transport
- Refuelling infrastructure yet to be developed
- More complex supply chain than for CNG

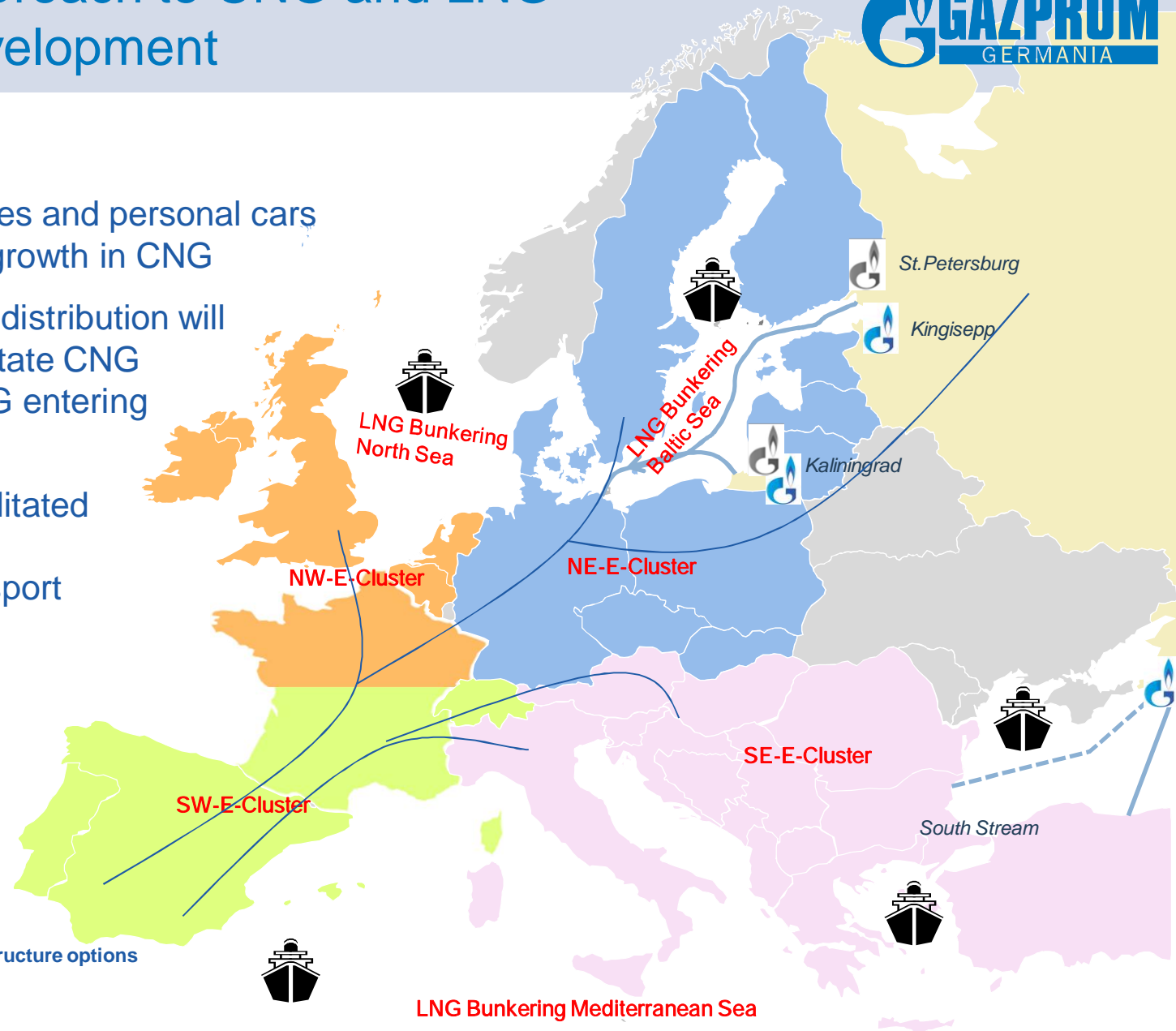


Both “CNG” and “LNG” are natural gas and meet EU6 standards at lower cost than competitive technologies

Cluster approach to CNG and LNG market development



- Light duty vehicles and personal cars with continuing growth in CNG
- Buses and local distribution will continue to facilitate CNG growth, with LNG entering the picture
- LNG growth facilitated by international heavy duty transport and bunkering



Thank you for your attention.

