

*Secure Energy Supply for Europe
in the mid and long-term*

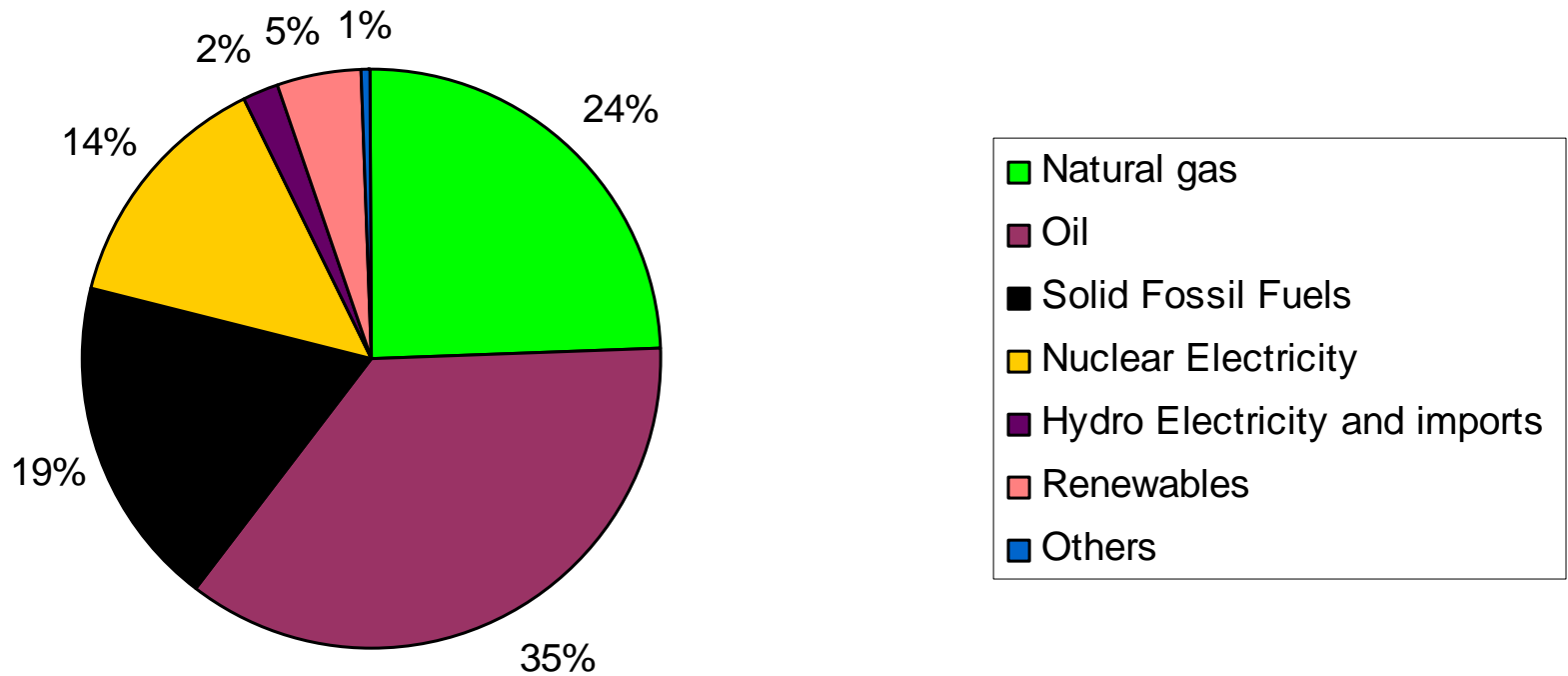
*JEF Seminar
Andorra 2nd October 2008*

*By Margot Loudon
Deputy Secretary General*

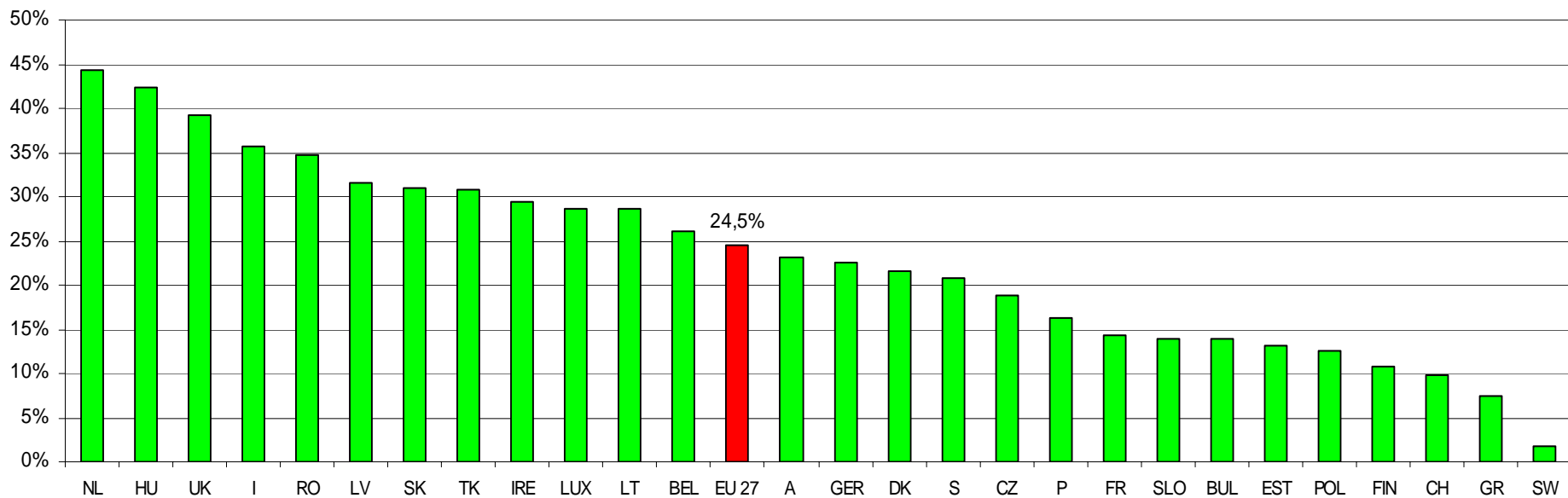
euro  **gas**
THE EUROPEAN UNION OF THE NATURAL GAS INDUSTRY

- The EU Energy Mix
- An overview of current supply/demand and future trends
- The challenges of import dependency
- Instruments to secure security of supply

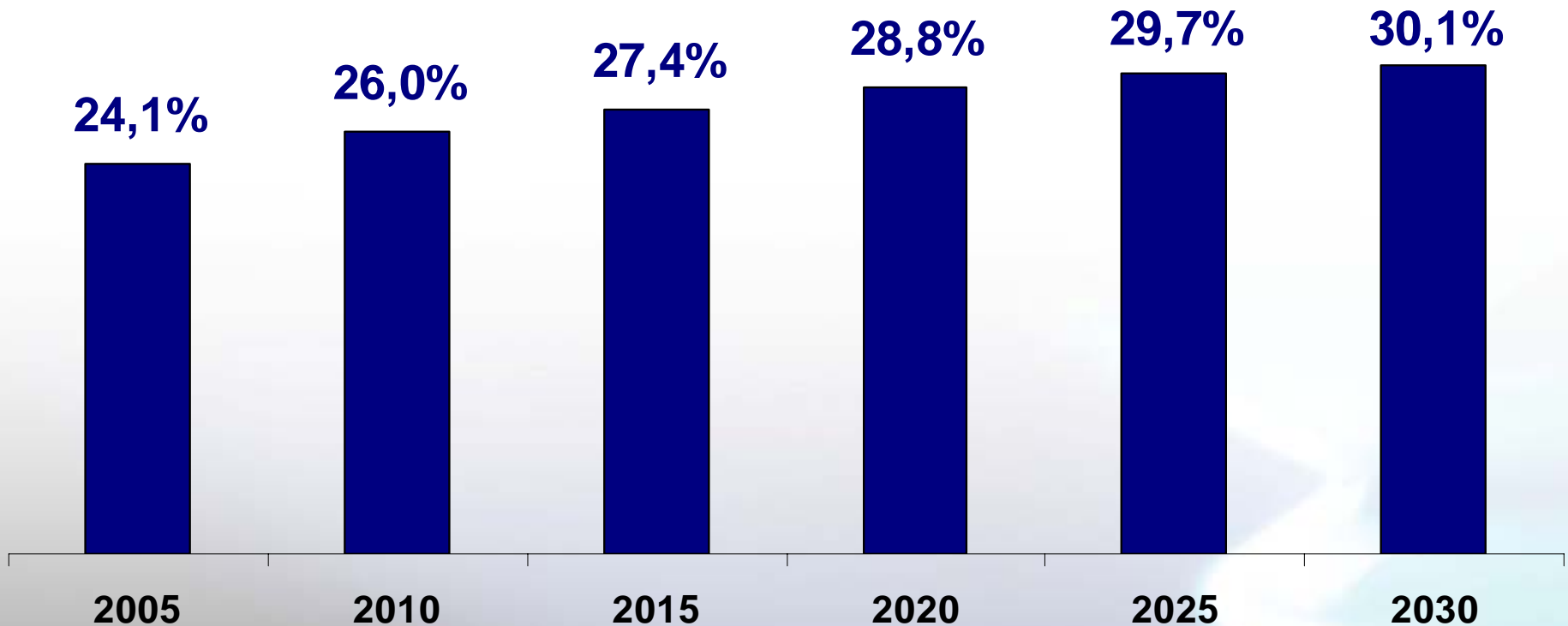
2006 Primary Energy Consumption by fuel



2006 Share of Natural gas in Primary Energy Consumption (%)



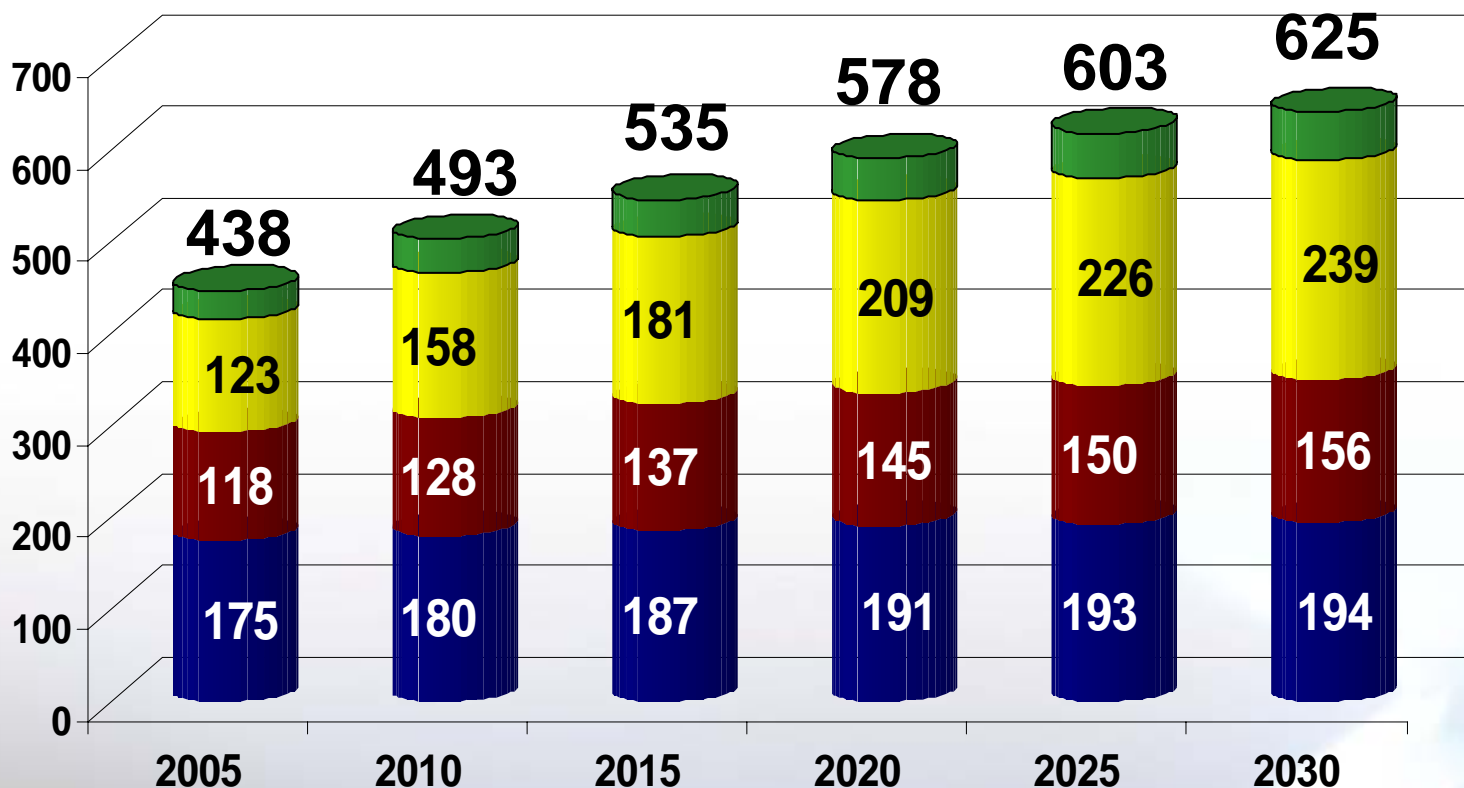
EVOLUTION OF SHARE OF NATURAL GAS in PEC in EU27
Growing importance of natural gas as a bridge fuel
to a sustainable future



EU27 Natural Gas demand outlook per Sector

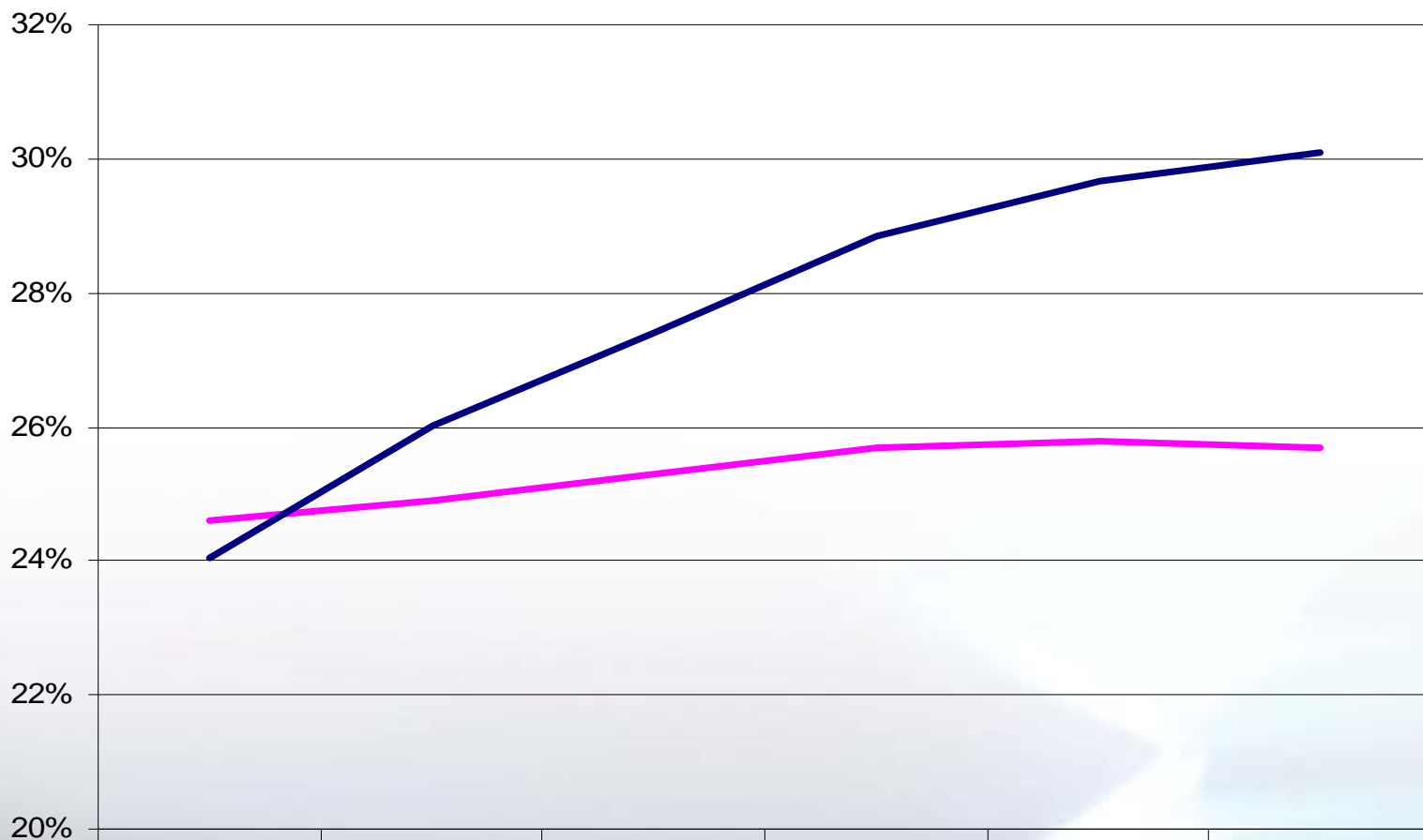
Gas demand is mainly driven by the power sector

[MTOE]



■ Residential & Commercial
 ■ Industry
 ■ Power Generation
 ■ Others (NGV+Heat Plants and Others)

Share of Natural Gas in PEC



— Share in PEC Primes

24,6%

24,9%

25,3%

25,7%

25,8%

25,7%

— Share Eurogas

24,1%

26,0%

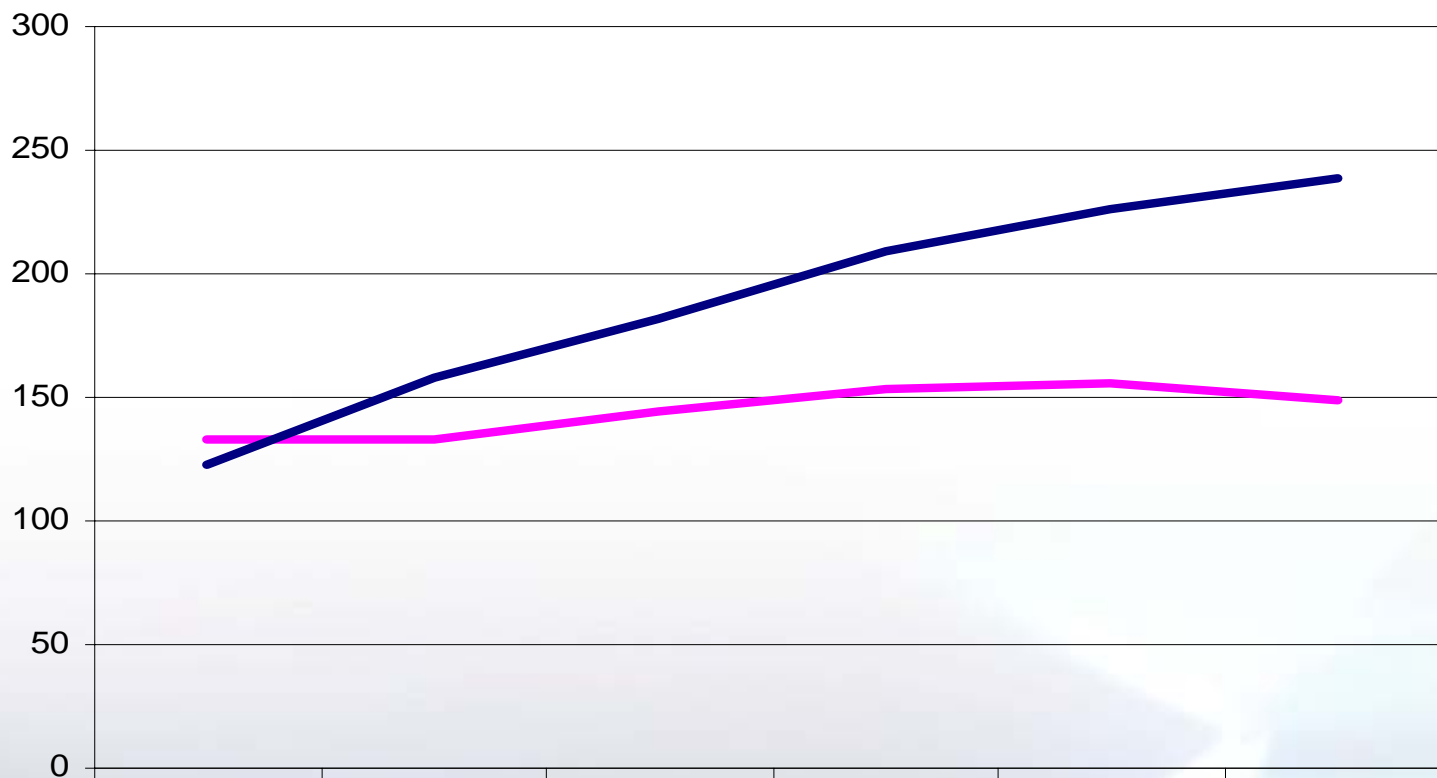
27,4%

28,8%

29,7%

30,1%

Power Sector

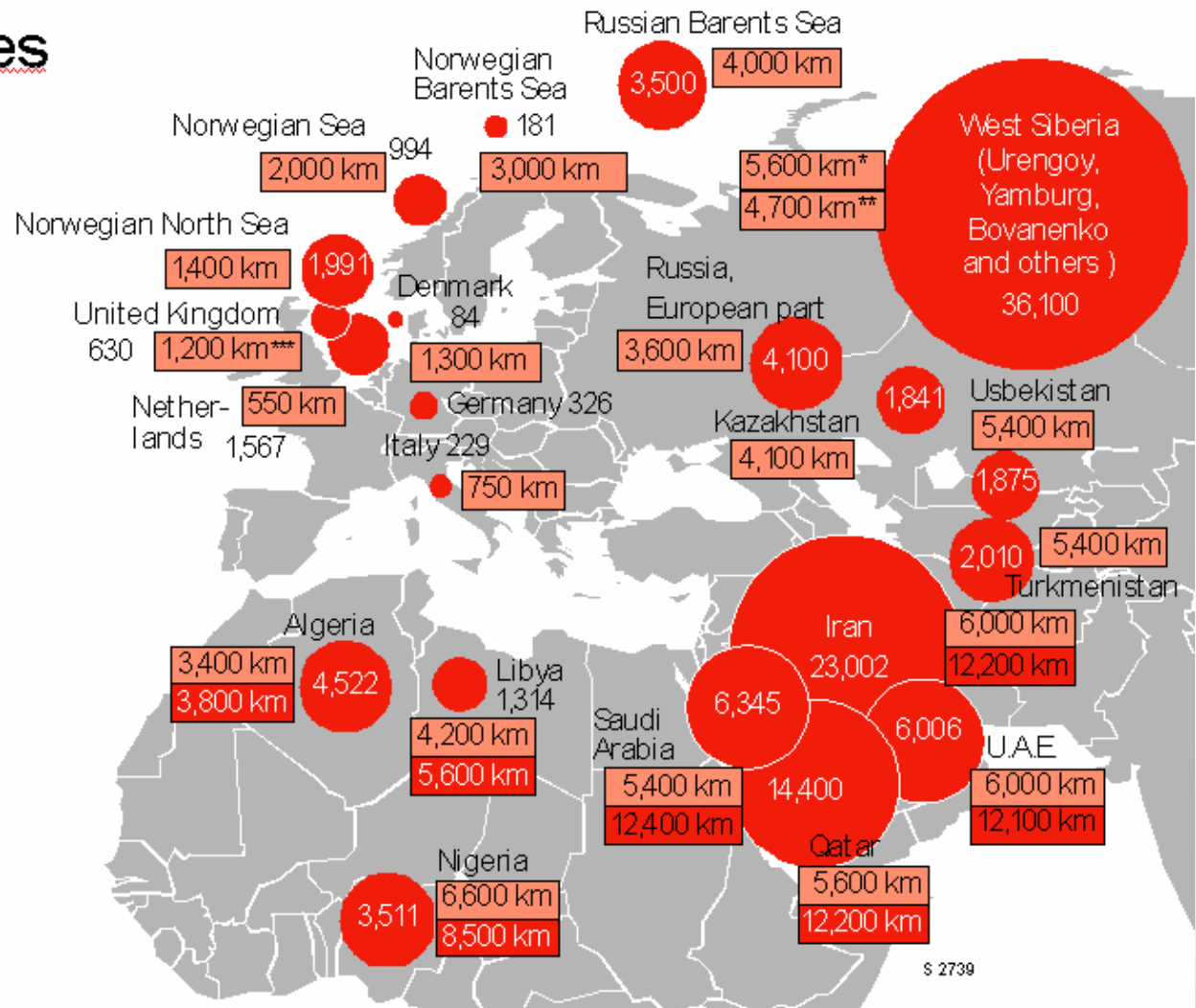


Power Primes 2007	133	132	145	154	156	149
Power Eurogas	123	158	181	209	226	239

Natural Gas Reserves and Supply Distances

billion m³

Pipeline to Frankfurt/Main
LNG to Wilhelmshaven



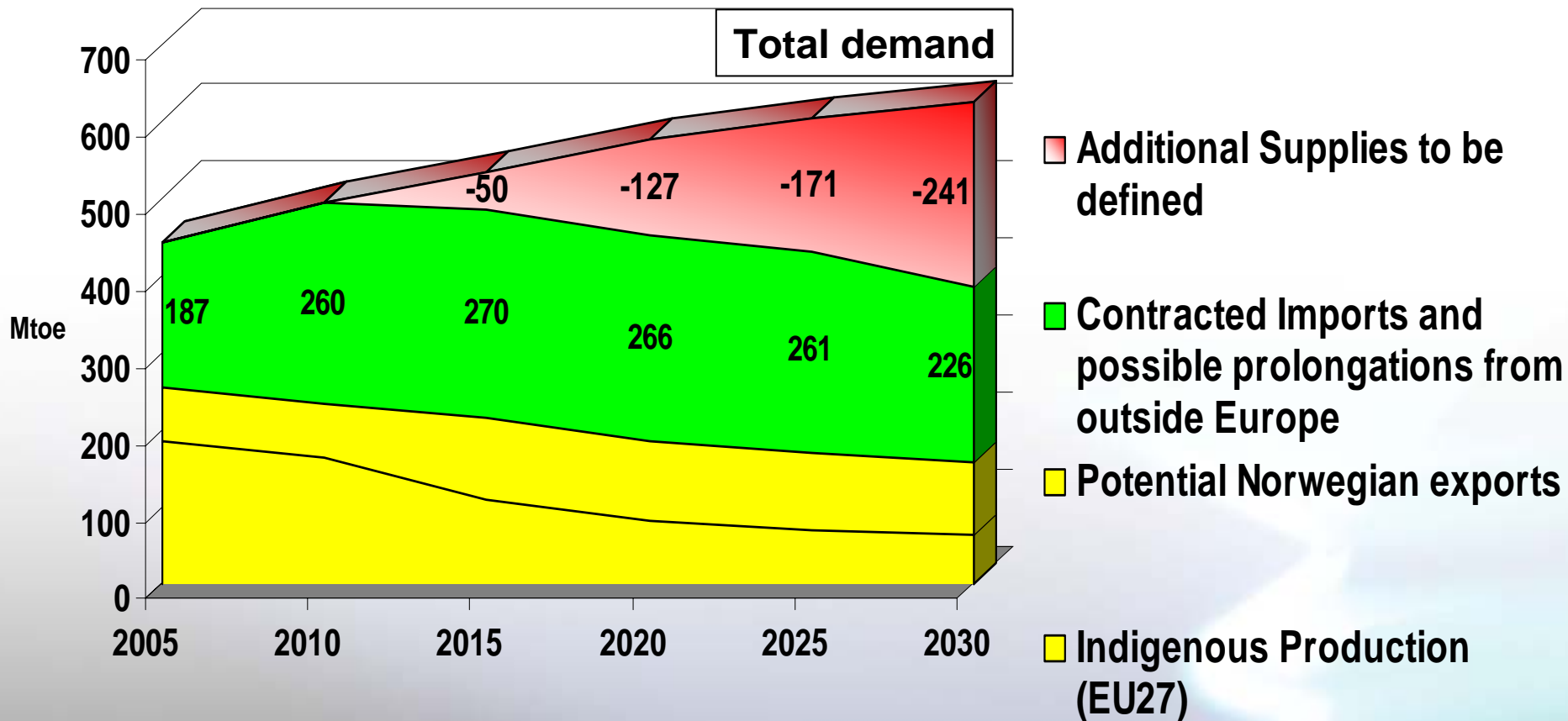
*Yamburg Area
**Yamal Peninsula
***northern area

1 m³ = 11.5 kWh

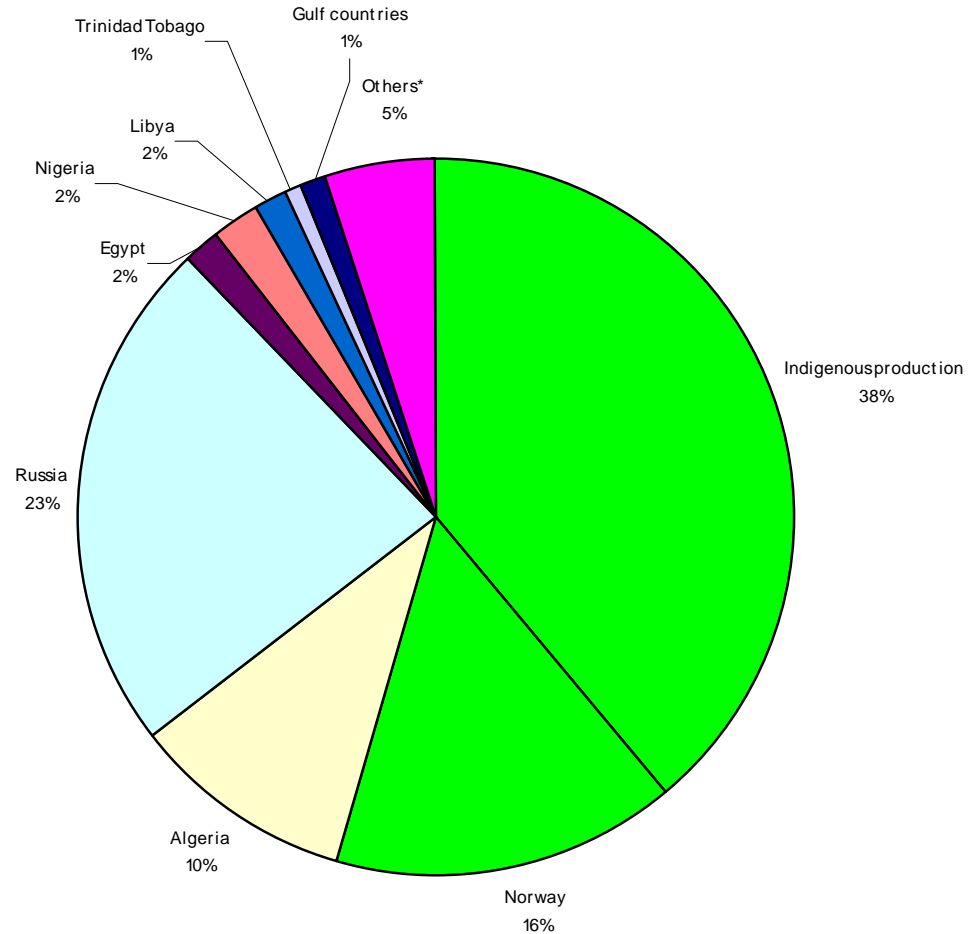
Source for natural gas reserves: Oil and Gas Journal, Norwegian Petroleum Directorate, others

EU27 Supply/Demand Outlook

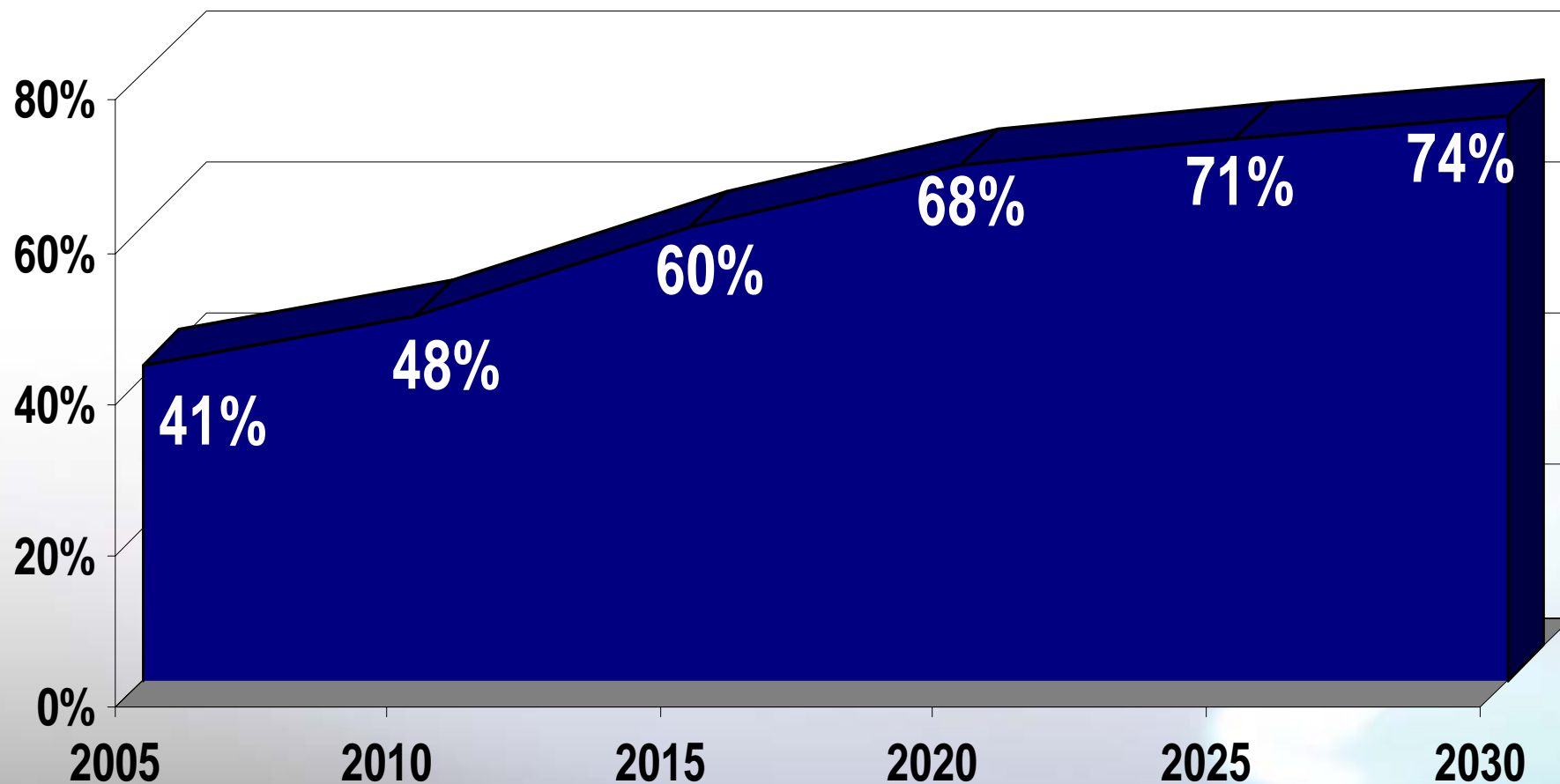
Additional supplies are needed in the long run



Breakdown of EU27 Natural Gas Net-Supplies



EU27 import dependency from outside Europe*



* Excluding Norway

The European Natural Gas Grid 2005

