

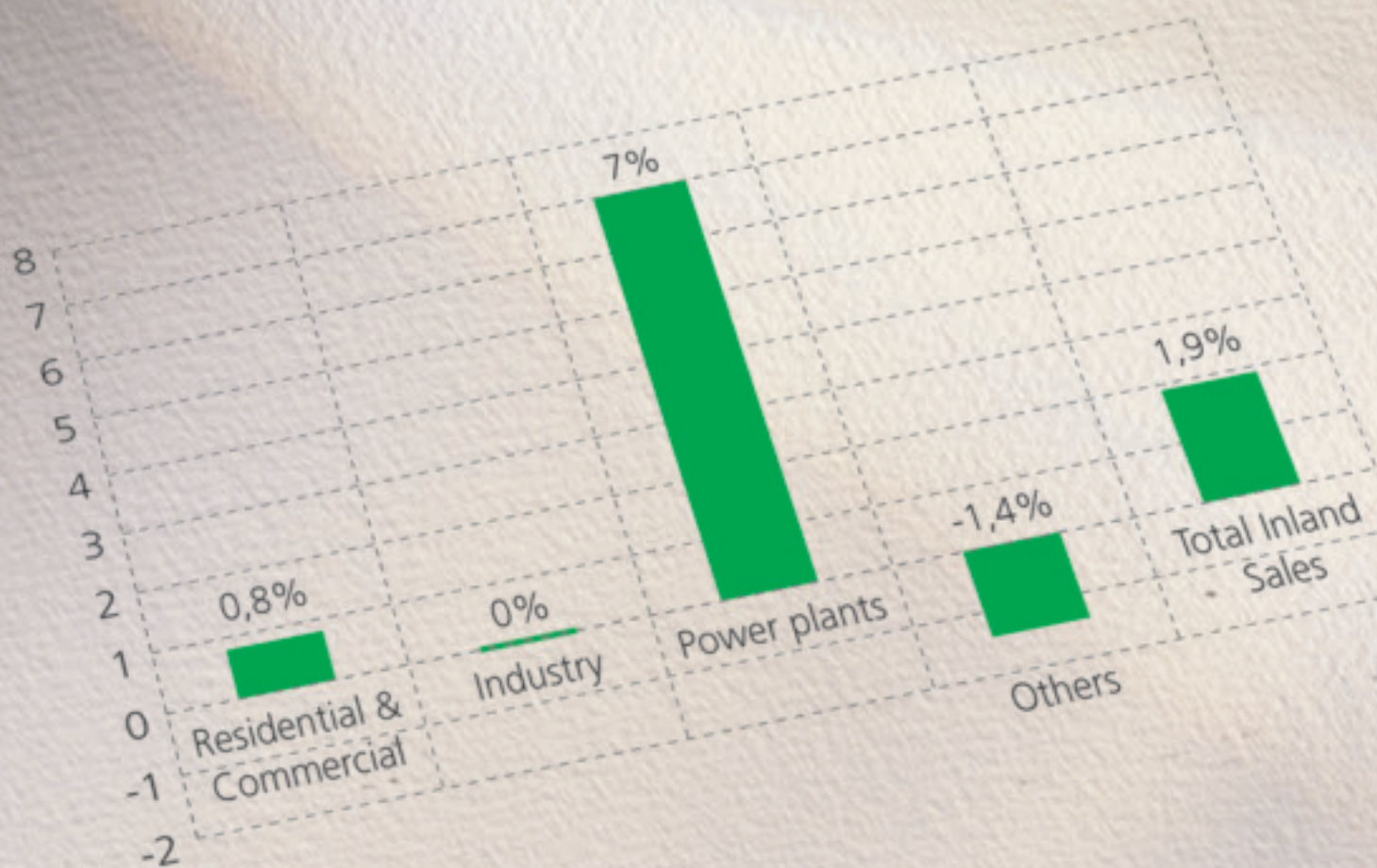


Statistics 2005

euro  gas

EU25 : Natural Gas Trends 2004–2005

Statistical Data & Taxes



The statistical data presented in this section has been collected with the assistance of the national gas associations and member companies of Eurogas. Additionally, for a full picture of the enlarged Union (EU25), data was kindly provided by the main natural gas companies from Estonia, Latvia and Lithuania (Eesti Gaas, Latvijas Gaze, AB Lietuvos Dujos). Malta and Cyprus are not included as they are not supplied with natural gas.

As a consequence of the increasing number of players in the liberalised European natural gas market, it should be stressed that it now becomes increasingly difficult to collect energy data. The data shown in this report is based on available national or European official statistics, gas industries information, completed with best estimates, which Eurogas has combined to give the best comprehensive survey at the time of publishing this annual report. Members of the Eurogas Statistics and Forecasting Committee made a substantial contribution to the statistics presented.

We present the following summary from figures received from our members.

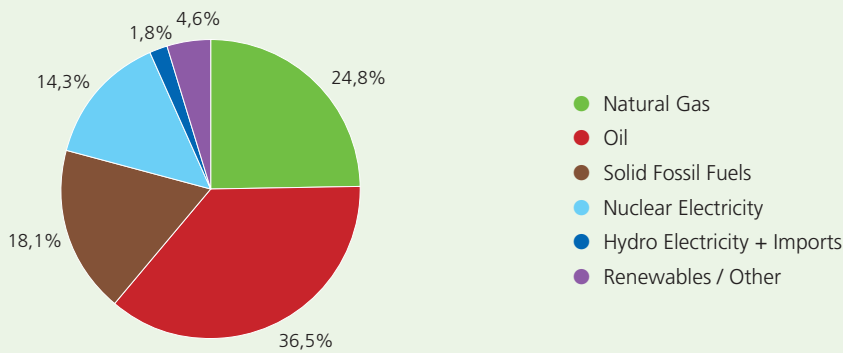
1. Primary Energy Consumption

Primary Energy Consumption (PEC), defined as the total gross energy supply (indigenous production + net imports) before conversion, represented 1754 MTOE in 2005. For a similar level of PEC as in 2004, most of the fuels have decreased slightly (oil, solid fossil fuels and nuclear). Renewables rose by 4% between 2004 and 2005, whereas natural gas increased by 1,4%. In 2005, natural gas remained the second most used fuel after oil, although its share increased slightly to 24,8% of Primary Energy Consumption in 2005.

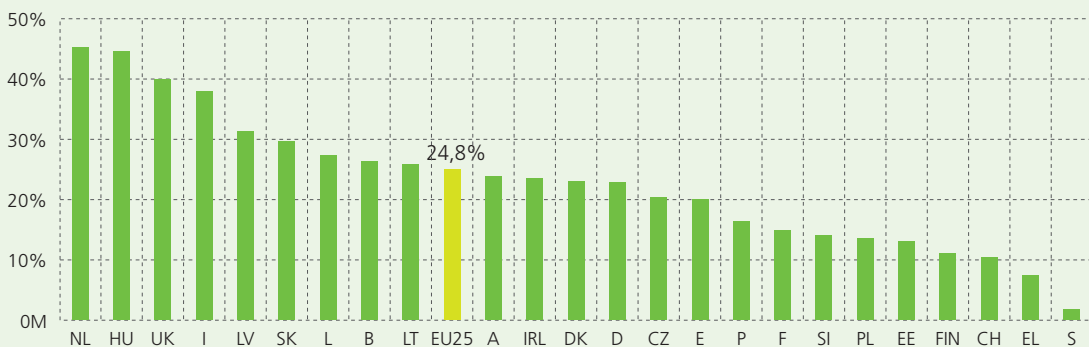
In some countries, with important gas reserves and/or mature gas market, the share of natural gas in PEC is very important. Amongst these, the Netherlands are the most important with 45%, followed by Hungary (44%), UK (40%) and Italy (38%). In Sweden and Greece, by contrast, the share of natural gas in PEC is very low, representing respectively 2% and 8%.

Between 2004 and 2005, the share of natural gas in the PEC in certain countries such as Spain, Portugal and Italy grew by over 5%. In other countries such as Luxembourg, Ireland, the Netherlands and UK the share of natural gas in PEC in comparison with 2004 decreased by 3%.

2005 Primary Energy Consumption by fuel (EU25)



2005 Share of Natural Gas in Primary Energy Consumption (%)



2005 Primary Energy Consumption in EUROGAS Member Countries and EU25

MTOE	Oil	Solid Fossil Fuels	Natural Gas	Nuclear Electricity	Hydro Electricity	Electricity Net Import	Renewables	Others	Total
A	14,6	3,9	8,1	0,0	3,3	0,0	4,2	0,0	34,2
B	22,2	5,7	14,7	12,4	0,6	0,0	0,7	0,0	56,3
CH	13,0	0,1	2,8	5,7	2,8	0,6	1,0	1,1	27,1
CZ	9,0	25,8	8,6	7,6	0,3	1,1	0,0	0,0	52,3
D	122,0	82,1	77,0	42,5	4,1	-0,7	12,5	0,0	339,5
DK	8,2	3,7	4,5	0,0	0,0	0,1	3,1	0,0	19,6
E	72,5	21,3	29,1	15,0	1,6	-0,1	6,8	0,0	146,2
EE	0,7	3,3	0,7	0,0	0,0	0,0	0,3	0,2	5,3
EL	17,5	9,1	2,3	0,0	0,4	0,2	1,2	0,0	30,7
F	92,0	13,6	40,8	117,7	5,0	-5,2	12,5	0,0	276,4
FIN	8,7	4,7	3,6	5,8	1,2	1,5	6,5	0,6	32,5
HU	6,6	3,1	12,0	3,6	0,0	0,5	1,2	0,0	27,0
I	86,0	16,9	71,1	0,0	3,7	4,2	6,4	0,0	188,3
IRL	8,4	2,5	3,5	0,0	0,1	0,1	0,3	0,0	14,8
L	3,1	0,1	1,3	0,0	0,0	0,3	0,0	0,0	4,8
LT	2,5	0,2	2,3	3,4	0,0	-0,6	0,7	0,0	9,1
LV	1,4	1,5	1,5	0,0	0,5	0,0	0,0	0,0	4,8
NL	29,8	8,2	35,5	0,9	0,0	1,7	0,4	2,4	78,9
PL	18,0	56,4	12,2	0,0	0,5	-0,6	4,7	0,0	91,3
P	15,4	6,3	4,5	0,0	0,9	0,6	0,1	0,0	27,7
S	16,5	2,4	0,9	18,0	5,2	-0,6	9,5	1,1	53,0
SI	2,4	1,5	1,0	1,4	0,3	0,0	0,5	0,0	7,1
SK	3,3	4,5	5,5	4,4	0,3	-0,2	0,4	0,3	18,7
UK	78,5	40,1	93,6	18,5	0,5	0,7	3,7	0,0	235,6
EU 15	595,4	220,6	390,5	230,8	26,5	2,8	67,9	4,2	1538,6
EU 25	639,3	316,9	434,3	251,2	28,4	3,1	75,6	4,7	1754,2

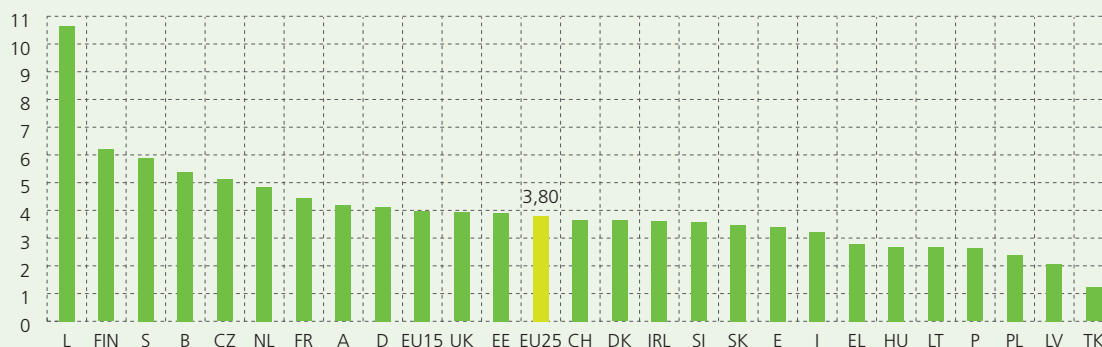
Notes: Nuclear and hydro electricity are domestically produced.
Renewables include biomass, wind solar and geothermal energy.

2005 Primary Energy Consumption (PEC) per capita and per GDP unit

	A	B	CH	CZ	D	DK	E	EE	F	FIN	EL	HU	I	IE	L	LT	LV	NL	PL	P	S	SI	SK	UK	EU15	EU25	TK
PEC/CAPITA	4,17	5,39	3,65	5,12	4,12	3,63	3,40	3,90	4,43	6,20	2,78	2,67	3,22	3,61	10,64	2,66	2,06	4,84	2,39	2,63	5,88	3,57	3,48	3,92	3,97	3,80	1,22
PEC/GDP RATIO	0,15	0,21	0,10	0,96	0,15	0,11	0,22	0,91	0,19	0,23	0,23	0,53	0,19	0,14	0,19	1,05	0,65	0,19	0,57	0,25	0,21	0,31	0,83	0,21	0,18	0,20	0,45

Note: Eurostat figures

2005 Primary Energy Consumption per capita (TOE)

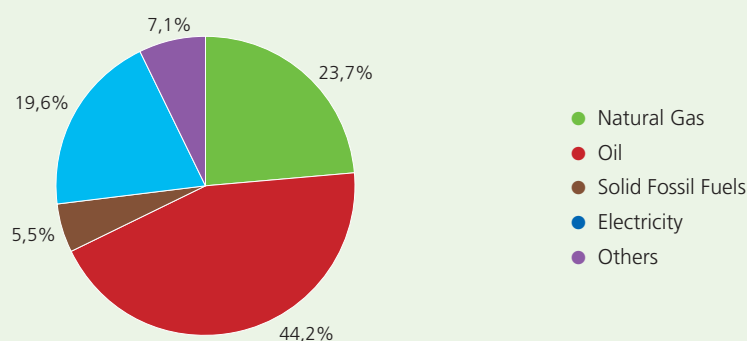


2. Final Energy Consumption

Final energy consumption (FEC) for 2004, which differs from Primary Energy Consumption (PEC) in terms of the net energy losses it takes into account, was compared with 2003. FEC in 2004 remained at 1182 MTOE – almost the same level as 2003. The slight increase of 1% was mainly due to the rise of non-electricity generating renewables and heat, followed by electricity (1,9%) and natural gas (0,9%). In both 2003 and 2004, natural gas remained in second position after oil, with a 23,7% share in FEC.

Between 2003 and 2004, the amount of natural gas in FEC in some countries such as Greece and Portugal grew by more than 8%; whereas in Poland and Slovakia it fell by over 8%.

2004 Final Energy Consumption by Source (EU25)



2004 Final Energy Consumption (FEC) in EUROGAS Member Countries and EU25

MTOE	Oil	Solid Fossil Fuels	Natural Gas	Electricity	Others	Total
A	11,5	0,6	4,7	4,9	4,1	25,8
B	20,3	2,4	11,5	6,9	0,5	41,6
CH	12,0	0,0	2,5	4,8	1,6	21,0
CZ	7,3	3,1	6,8	4,5	4,4	26,1
D	90,4	17,6	56,4	44,7	12,0	221,1
DK	7,4	0,3	1,7	2,8	3,3	15,5
E	61,6	2,4	16,8	19,9	3,7	104,4
EE	0,8	0,1	0,1	0,5	1,1	2,6
EL	14,5	0,6	0,6	4,3	1,1	21,0
F	72,7	6,3	31,8	36,2	13,8	160,8
FIN	9,0	1,3	1,7	7,2	8,3	27,5
HU	5,8	0,8	7,8	2,7	1,8	18,9
I	69,9	4,4	41,9	25,4	2,3	143,9
IRL	7,8	0,8	1,3	2,0	0,2	12,1
L	2,9	0,1	0,8	0,6	0,1	4,4
LT	1,7	0,2	1,0	0,7	1,5	5,1
LV	1,2	1,0	0,5	0,5	0,6	3,8
NL	23,7	2,2	21,6	8,8	5,1	61,4
PL	18,2	9,8	9,7	11,0	10,2	58,8
P	10,7	0,1	1,4	3,7	2,8	18,6
S	11,8	6,9	0,6	11,3	4,3	34,9
SI	2,3	0,1	0,7	1,1	0,6	4,8
SK	1,9	0,8	3,1	2,1	1,3	9,2
UK	69,0	3,3	57,3	30,0	0,7	160,3
EU 15	483,1	49,3	249,9	208,6	62,2	1053,2
EU25	522,3	65,1	279,7	231,6	83,8	1182,6

Notes: Electricity includes electricity produced by CHP-plants.
Heat produced by CHP-plants is included in "Others".
Others includes heat (e.g. district heating) and non-electricity generating renewables (e.g. biomass generated heat).

3. Inland Deliveries

The deliveries of natural gas for final inland consumption ("Inland deliveries") are presented by sector. The current changes in the gas sector have significantly complicated data collection, and unfortunately the calculation of sector-totals for EU25 was not possible. Despite the lack of figures from Austria, the present summary provides indicative totals by sector.

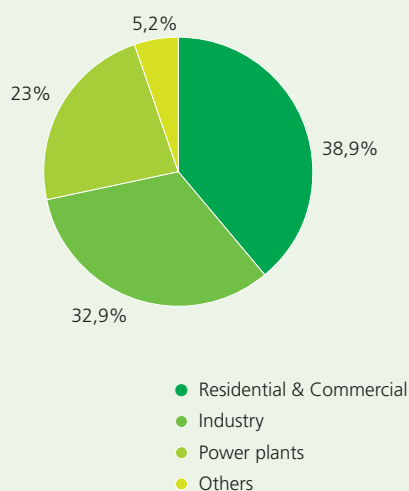
The total Inland deliveries for the EU25 in 2005 increased to 19210 PJ (493 Bcm) from 18859 PJ (483 Bcm) in 2004, representing a growth rate of 1,9% over the period. From the data provided, between 2004 and 2005, deliveries of natural gas have developed differently in each sector: the industrial sector registered the same rate, the residential/commercial increased by 1% and the power sector by 7%.

In the residential and commercial sector, the countries where natural gas deliveries have registered high growth rates between 2004 and 2005 are Greece (89%), Portugal (22%), Spain (8,5%) and Italy (6,9%). In 2005, the opposite trend was observed in Ireland (-8,9%), the Netherlands (-5,8%) and Germany (-2,5%). Outside the EU, Turkey has seen the use of natural gas in the residential/commercial sector soar by 31%.

The industry sector remained at its 2004 level. Nevertheless some countries have seen substantial falls, for example Ireland (-24%), Finland (-7,3%) and UK (-5,2%), due to milder weather conditions and fuel switching. The opposite was the case in Greece (up 12,8%), Portugal (up 8,8%) and outside the EU, Turkey has registered a 29,7% increase between 2004 and 2005.

The power sector is the main contributor for the increase in natural gas deliveries. In terms of their growth rates between 2004 and 2005, important differences exist between the countries, with Spain (68%), Portugal (15,7%) and Italy (14,3%) having significantly increased their use. Since 2005, France has also started using natural gas for power plants. On the other hand, Finland (-19,3%), Slovakia (-13,4%) and Ireland (-9,1%) have seen their rates of natural gas used in the power sector decrease.

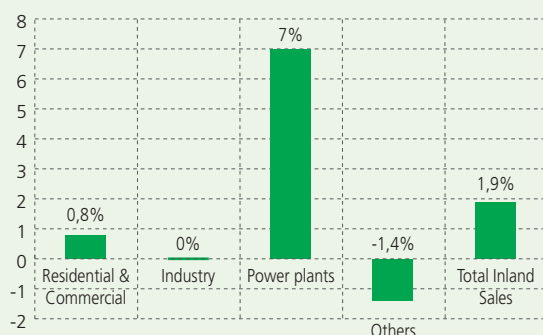
2005 Natural Gas sales by sector (EU25)



2005 Inland Sales of Natural Gas by sector in Eurogas Member Countries and EU25

[PJ]-GCV	Residential & Commercial	Industry	Power Plants	Others	Total inland Sales [PJ] - GCV
A	-	-	0,0	-	362,0
B	256,8	237,7	188,9	0,0	683,4
CH	73,9	38,9	0,0	16,5	129,4
CZ	192,0	155,1	7,3	0,0	354,4
D	1205,0	1450,0	325,0	480,0	3460,0
DK	42,5	51,1	36,8	56,2	186,6
E	201,2	750,7	400,9	0,0	1352,8
EE	3,4	11,0	2,8	14,8	32,0
EL	6,8	26,5	74,4	1,0	108,7
F	1032,0	696,0	19,0	148,0	1895,0
FIN	3,3	77,9	35,7	50,4	167,4
HU	292,7	85,5	146,1	38,3	562,6
I	1150,8	820,9	1256,3	55,1	3283,1
IRL	41,0	14,0	91,0	3,0	149,0
L	35,1	0,0	19,6	0,0	54,7
LT	10,0	43,3	59,1	0,9	113,2
LV	10,0	15,6	37,8	1,2	64,6
NL	689,3	654,2	309,5	0,0	1653,0
PL	206,2	272,3	44,8	11,9	535,2
P	12,2	76,1	83,8	0,0	172,1
S	9,2	18,8	0,0	10,9	38,9
SI	8,9	34,7	0,4	3,1	47,1
SK	84,5	80,4	46,5	25,9	237,3
UK	1832,0	638,0	1148,0	79,0	3697,0
EU15					17263,8
EU25					19210,2

2005 Gas Demand Growth Rate by Sector (EU25) over 2004 (%)



4. Natural Gas Supplies

Supplies of natural gas give indications about indigenous production and imports in EU25. Total net supplies (Indigenous production + imports – exports +/- stocks) of the EU25 increased by 1,9% between 2004 and 2005.

Indigenous production in the EU25 has decreased by 6,9% to 8010 PJ (205 Bcm) over the period: Spain (-84%), Slovakia (-38%), Ireland (-34,4%) and France (-25%). In 2005, 41% of EU25 natural gas net supplies were covered by indigenous production. Three quarters of EU25 indigenous production is concentrated in two countries: 43% in UK and 33% in the Netherlands. Between 2004 and 2005, some countries increased their indigenous production with the Czech Republic (54,8%) in the lead, followed by Denmark (23%) and outside the EU, Turkey (26,8%).

In 2005, 185,5 PJ (4,7 Bcm) of natural gas were injected in storage across EU25.

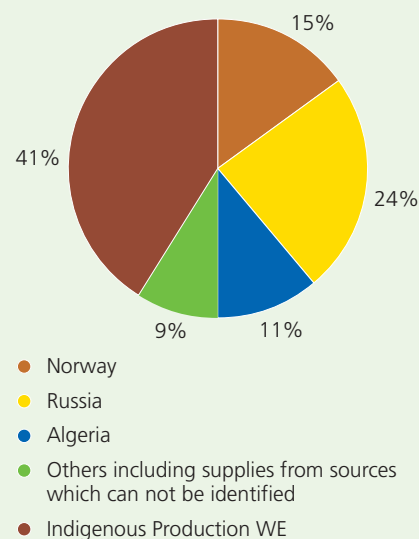
Total net imports from non-EU countries have increased by 14 %, representing 11 706 PJ (300 Bcm) in 2005. Imports from non-EU countries originate from fifteen different countries, amongst which the most important are: Russia (24%), Norway (15%), Algeria (11%), Libya, Nigeria, Egypt and Qatar.

Eurogas Member Countries and EU25

2005 Supplies of Natural Gas					
[PJ]	Indigenous Production	Total Net-Import EU	Total Net-Import non-EU	Changes in stocks	Total Net Supply
A	65,0	35,0	299,0	-20,0	362,0
B	0,0	236,4	452,9	-3,6	683,4
CH	0,0	115,4	14,0	0,0	129,4
CZ	4,8	2,2	353,8	0,6	354,3
D	660,0	515,0	2395,0	-110,0	3460,0
DK	437,1	233,2	0,0	1,0	177,3
E	2,2	0,0	1403,4	-59,8	1352,8
EE	0,0	0,0	32,0	0,0	32,0
EL	0,0	0,0	108,5	0,0	108,7
F	39,0	271,0	1622,0	-26,0	1896,0
FIN	0,0	0,0	167,4	0,0	167,4
HU	108,4	42,6	413,7	-2,1	562,6
I	456,3	344,0	2439,7	43,1	3283,1
IRL	21,0	130,0	0,0	0,0	151,0
L	0,0	55,8	0,0	0,0	55,8
LT	0,0	0,0	115,2	0,0	113,2
LV	0,0	0,0	63,4	0,0	64,6
NL	2623,7	1512,3	541,6	0,0	1653,1
PL	170,6	11,3	370,0	-8,2	535,5
P	0,0	5,7	189,2	-7,9	172,1
S	0,0	38,8	0,0	0,4	38,9
SI	0,2	8,2	38,2	0,1	47,6
SK	3,6	8,2	250,7	1,8	238,2
UK	3418,0	171,0	450,0	5,0	3698,0
EU 15	7722,3	296,2	10068,8	-177,8	17259,6
EU 25	8009,9	244,5	11705,7	-185,5	19207,6
TK	35,0	0,0	1037,9	-5,4	1067,5

Changes in stocks: (-) Injection, (+) Withdrawal.

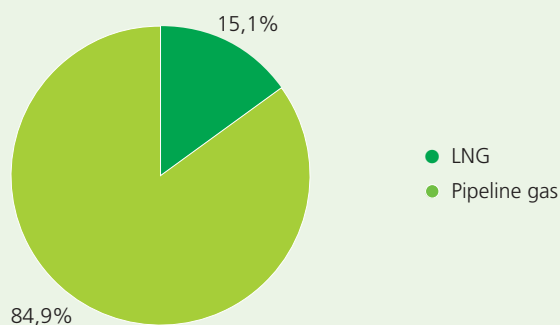
2005 Breakdown of EU 25 Natural Gas Net-Supplies



5. LNG Imports

A few countries in the EU25 form the EU LNG market, with Spain taking a share of 52%, followed by France (29%), Belgium (7%) and Italy (5%). In 2005, LNG imports in the EU25 grew from 1453 PJ (37 Bcm) to 1761 PJ (45 Bcm) (or 21,2%) as compared with 2004. All the EU countries have increased their share of LNG imports except Greece. Between 2004 and 2005, Spain, Italy and France registered a growth rate of between 20 and 25%. After 2005, the UK also became an LNG importer.

2005 Net-import from non EU countries by transport (EU25)



In 2005, 15% of the total net imports from non EU countries were in the form of LNG - a 1% increase of the share over 2004. Spain leads in Europe with 65% of its imports consisting of LNG, followed by Portugal (39%) and France (27%). Most of the countries have seen a regular increase of between 1% and 3% of their share of LNG imports (compared with total imports). Turkey is also an important LNG importer with 18% of its total imports being LNG.

2005 LNG Supplies in EUROGAS Member Countries and EU25

[PJ]	B	E	EL	F	IT	P	UK	EU 25	TK
LNG-Imports	128,2	918,3	17,8	516,0	95,4	73,0	14,0	1762,7	187,5

6. Storage Facilities

The total number of storage facilities in the EU25 has reached 120 units. Three new additions between 2004 and 2005 were constructed in Germany, Poland and Portugal.

With the three new facilities and the increased maximum working volume in certain countries, the total maximum withdrawal capacity in the EU25 increased by 1,3% from 1462 million m³/day in 2004 to 1481 million m³/day in 2005.

Natural Gas Storages at 1 January 2006

	A	B	CH	CZ	D	DK	E	EE	EL	F	FIN	HU	I	IRL	L	LT	LV	NL	P	PL	S	SI	SK	UK	EU 15	EU 25
Number of storage facilities	4	2	1	9	44	2	2	0	1	15	0	5	10	1	0	0	1	3	1	7	1	0	3	9	95	120
Max. work. volume [M. m ³]	2820	635	72	3376	19068	760	1500	0	75	11700	0	3400	12600	200	0	0	2315	3500	90	1622	10	0	2061	4208	57166	69940
Max. withdr. capac. [M. m ³ /d]	33	18	2	55	476	18	12	0	5	200	0	48	257	4	0	0	24	143	7	34	1	0	23	124	1296	1481

7. Natural Gas Industry in Figures

The total number of gas customers (domestic, commercial and industrial) in the EU25 increased by 1,2% to 102 million in 2005.

A	B	CH	CZ	D	DK	E	EE	EL	F	FIN	HU	I	IRL	L	LT	LV	NL	P	PL	S	SI	SK	UK	EU 15	EU 25	TK
1360	2700	472	2797	18850	360	6177	66	62	11425	36	3364	16060	539	84	533	434	6520	855	6386	55	117	1441	21963	86993	102184	388

(in thousands rounded at 1 January 2006)

The natural gas industry in the EU25 employed 208 700 people as of 1st of January 2006.

A	B	CH	CZ	D	DK	E	EE	EL	F	FIN	HU	I	IRL	L	LT	LV	NL	P	PL	S	SI	SK	UK	EU 15	EU 25	TK
2700	3800	1620	5800	35000	1400	5733	315	1089	26000	335	5970	30000	714	210	1930	1306	9500	766	19009	200	410	4916	51600	168847	208703	1117

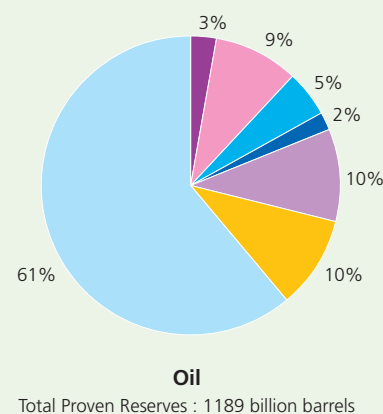
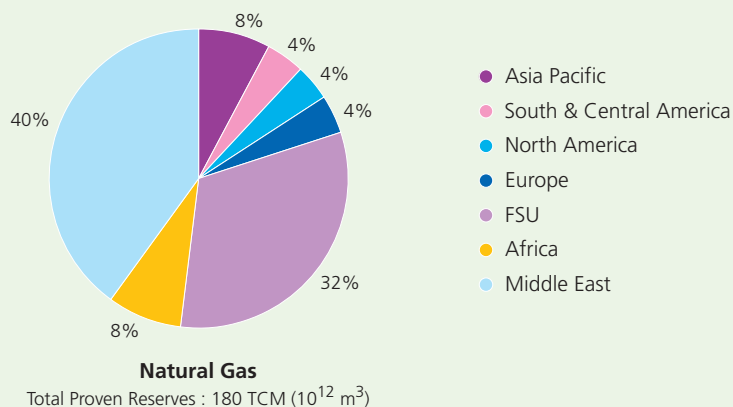
The European natural gas industry constructed an additional 25 150 km of pipelines between 2004 and 2005, bringing the total length of pipelines in the EU25 in 2005 to 1 812 067 km.

A	B	CH	CZ	D	DK	E	EE	EL	F	FIN	HU	I	IRL	L	LT	LV	NL	P	PL	S	SI	SK	UK	EU 15	EU 25	TK
_	_	2190	3643	_	1439	11600	0	994	36490	1030	5278	32300	2002	405	1800	1281	11600	1431	18020	530	980	2270	6891	106182	139984	5584
_	_	14447	69647	_	17000	43695	2210	3393	187600	1570	79795	205000	9316	1960	6600	4339	135200	11021	101553	2000	2200	30566	274600	890885	1189265	2325
33518	59300	16637	73290	390000	18439	55295	2210	4387	224090	2600	85073	237300	11318	2365	8400	5620	146800	12452	119573	2530	3180	32836	281491	1481355	1812067	7909

(in km at 1 January 2006)

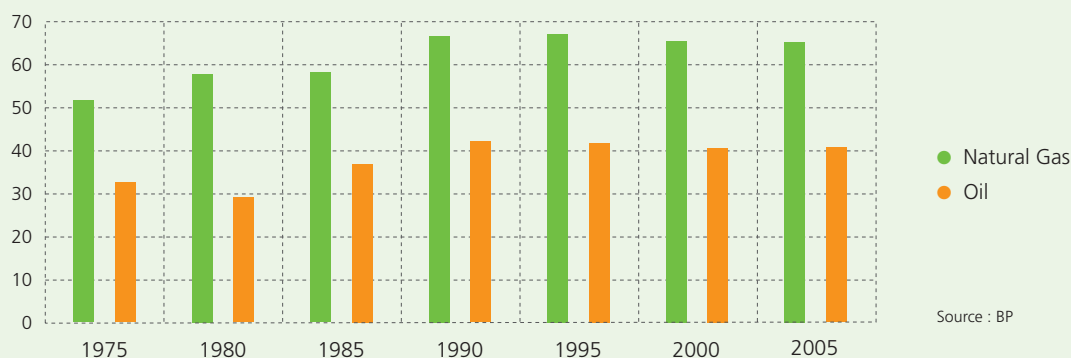
8. Natural Gas Reserves

World Gas and Oil Reserves by region, 2005



Source : BP

World Reserves / Production Ratios, Gas vs Oil (years)



8. Definitions and Conversion Factors

Internationally agreed statistical methods and definitions have been applied. Primary Energy Consumption is defined as the total gross energy supply (indigenous production plus net imports) before any conversion of the primary energy into final energy forms has taken place. Final Energy Consumption is the Primary Energy Consumption less net energy losses in the production of electricity and synthetic gas, refinery use and other energy sector uses and losses. Natural Gas sales and supplies have been stated in PJ because of different national gas qualities. With an assumed energy content of 1 m³ of natural gas of 39 MJ (Gross Calorific Value), 1 PJ corresponds to approx. 25.6 million m³ of natural gas.

Conversion factors

1 PJ (GCV)	=	25.6 million m ³ gas
1 m ³ of natural gas	=	39 mega joules (MJ – GCV) = 10.8 kWh
1 Mtoe	=	1 million tones of oil equivalent = 41.86 PJ (NCV)
1000 m ³ of natural gas	=	0.9 ton oil equivante (toe – crude oil)
1 BCM	=	1 billion cubic meters
1 cubic meter (m ³)	=	35.315 cubic feet (cf)
1 million m ³ of LNG	=	593 million m ³ of gas

Net Caloric value (NCV)	=	0.9 Gross calorific value (GCV)
1 megajoule	=	10 ⁶ joules (MJ)
1 gigajoule	=	10 ⁹ joules (GJ)
1 terajoule	=	10 ¹² joules (TJ)
1 petajoule	=	10 ¹⁵ joules (PJ)

Heat units

Equivalent to	GJ	kWh	MBtu	th	therm
1 gigajoule (GJ)	1	277.8	0.948	238.9	9.479
1 kilowatt-hour (kWh)	3.6 10 ⁻³	1	3.411 10 ⁻³	0.86	3.411 10 ⁻²
1 million British Thermal Units (MBtu)	1.055	293.2	1	252	10
1 thermie (th)	4.186 10 ⁻³	1.162	3.968 10 ⁻³	1	3.968 10 ⁻²
1 therm	0.1055	29.32	1 10 ⁻¹	25.2	1