Russian Gas: Challenges Ahead on the Domestic Front,
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Production and domestic consumption

![Chart showing production and consumption of gas from 2000 to 2030, with forecasts for 2015 to 2030. The chart includes data from Gazprom, Novatek, and other producers.](image)

Source: BP Statistical Review of World Energy, BP 2030 Global Energy Outlook, CDUTEK (Central Dispatch Unit of Ministry of Energy)
Gas and coal supply to the power sector

Source: CDU TEK
Gas net-storage in Russia and abroad

Source: Gazprom
Russian gas flows to Europe

Source: CDU TEK
Russian gas flows to CIS

Source: CDU TEK
Gas exports by destination

Source: CDUTEK
Gas production 2012-2013

Source: CDU TEK
Gas production per company (incl. APG)

Source: CDU TEK
Associated petroleum gas production and flaring

Source: CDU TEK
Gazprom’s production per fields

St Bcm

Source: RPI
Russian gas prices still vary a lot by the market

Source: Gazprom
Domestic gas sales and prices

Source: Gazprom
Wholesale gas prices by country, 2012

Mineral extraction tax rate for gas

2011=100

$0.25/ MmBtu

Source: Tax Code
Gazprom is still heavily dependent on European gas exports

2012

Gazprom gas sales: 422.4 St Bcm

- Europe 32.3%
- Domestic 53.5%
- FSU 14.2%

Revenue: $85.5 billion

- Europe 54.6%
- Domestic 26.5%
- FSU 18.9%

Direct Taxes Paid: $11.4 billion

- Europe 52.9%
- Domestic 24%
- FSU 23.1%

Source: Gazprom, CDUTEK
Sources of Gazprom’s revenue

Source: Gazprom
Gas reserves by company

Source: companies’ financial statements and annual reports
Gazprom and Novatek CAPEX dynamics

Source: Gazprom, Novatek
Gazprom’s CAPEX breakdown

$ billion

Source: Gazprom
New export routes for Russian gas in Europe

North Stream
Stage 1, 2 capacity: 55 bcm
Further extension (st 2.3) is under consideration

South Stream
Distance: 900 km (sea)
Planned capacity: 63 bcm

Yamal-Europe
Distance: over 2000 km
Capacity: 33 bln m³

Yamal-Europe II
Distance: 600 km
Planned capacity: 15 bcm
Feasibility study due in Oct 2013

Blue Stream-2
Distance: 1213 km (sea)
Planned Capacity: 16 bcm

Source: Gazprom, Platts
New Gas in Eastern Siberia and Far East

Source: Gazprom
Russia’s CNG Production

![Bar chart showing Russian CNG production from 2010 to 1H2013.](chart.png)

Source: CDU TEK
Small-scale LNG Plants in Russia

**Kalinigrad**
- 1) Announced: September, 2012
- Launch: 2013/14
- Planned capacity: 0.034 bcm
- 2) In consideration
- Planned capacity: 0.2 bcm

**Petrodvorets**
- Launch: 1996
- Capacity: 0.012 bcm

**Kingisepp**
- Launch: 2008
- Capacity: 0.010 bcm

**Novgorod**
- Announced: October, 2012
- Launch: 2014
- Planned capacity: 0.076 bcm

**Perm**
- Launch: winter, 2013/14
- Planned capacity: 0.02 bcm

**Smolensk**
- Announced: April, 2013
- Launch: 2014
- Planned capacity: 0.2 bcm

**Kargal (Tomsk oblast)**
- Announced: February, 2013
- Launch: n/a
- Planned capacity: 0.03 bcm

**Tambov**
- Announced: September, 2012
- Launch: 2014
- Planned capacity: 0.41 bcm

**Pervouralsk**
- Launch: 2002
- Capacity: 0.006 bcm

**Yekaterinburg**
- Launch: 2010
- Capacity: 0.035 bcm

**Source:** IHS CERA
Results of drilling for coal seam gas in Russia

Taldynsk coal seam gas field

A – Expected debit, m³/day

B – Actual debit, m³/day

1, 3 – Upper layers

2, 4 – Lower layers

Source: Oil and Gas Geology, N3, 2013