

**Intesco
Research
Group**

WORLD GAS MARKET AND RUSSIAN GAS MARKET. CURRENT SITUATION AND FORECAST



MOSCOW 2012

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Subject of research:

GAS MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2013-2015

Regions of research:

WORLD, RUSSIA AND REGIONS OF RF

Main blocks of research:

WORLD GAS MARKET

VOLUME OF THE RUSSIAN GAS

TRENDS ON THE RUSSIAN GAS MARKET

STATE REGULATIONS OF GAS MARKET

THE LARGEST PLAYERS ON THE RUSSIAN GAS MARKET

GAS PRODUCTION IN RUSSIA

THE LARGEST RUSSIAN GAS PRODUCERS

ANALYSIS OF THE RUSSIAN GAS IMPORT

ANALYSIS OF THE RUSSIAN GAS EXPORT

PRODUCER PRICES FOR GAS IN RUSSIA

RETAIL PRICES FOR GAS IN RUSSIA

FORECAST OF THE RUSSIAN GAS MARKET DEVELOPMENT

The largest Russian enterprises with profiles:

«BASHNEFT» JSC

«ORENBURGNEFT» JSC

«LUKOIL PERM» LLC

«GAZPROM DOBYCHA YAMBURG» LLC

«GAZPROM DOBYCHA URENGOY» LLC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development of RF
Ministry of Agriculture of RF
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sale reports
Materials of the field's main players
Field print and electronic publications

Research contains 76 schedules, 64 diagrams and 97 tables.

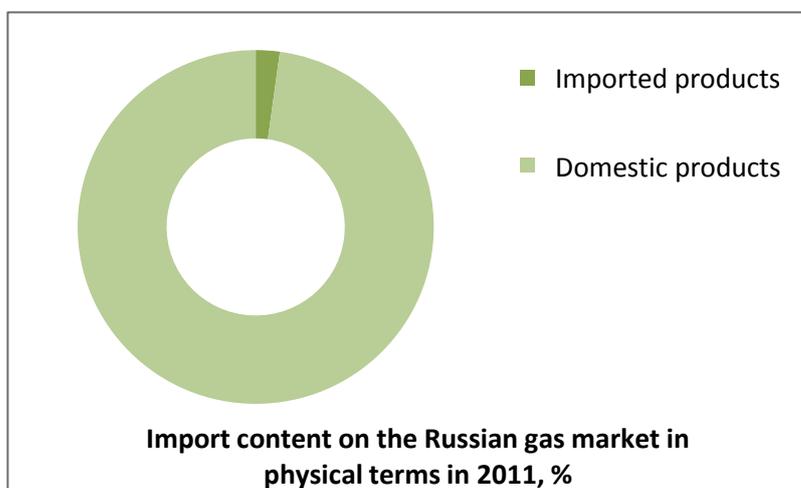
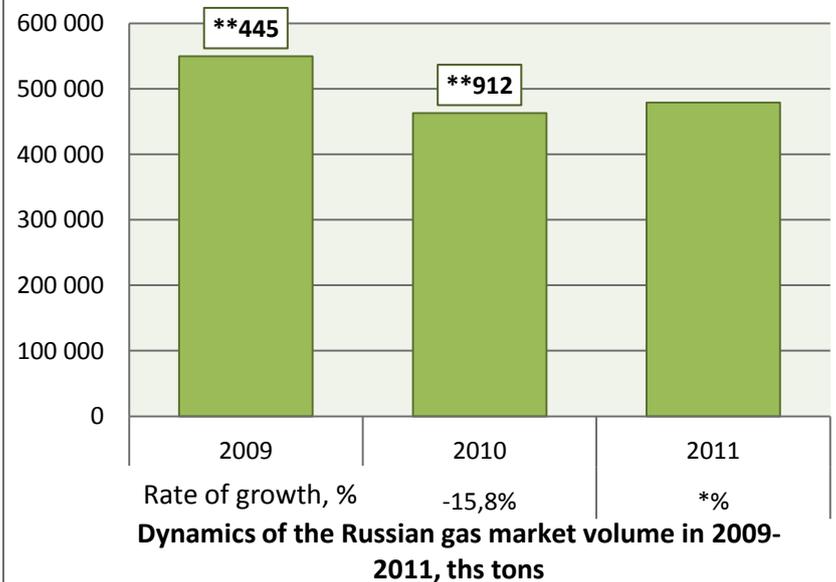
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CHAPTER 4

VOLUME OF THE RUSSIAN GAS

Volume of the Russian gas market according to experts of Intesco Research Group, in 2010 decreased by 15,8% and amounted to 445 mln tons. In 2011 this parameter increased by 8% to the level of 500 mln tons.

Gas market in Russia was provided primarily by the domestic production. Thus, the share of imported products in physical terms on the domestic market in 2011 according to estimates of Intesco Research Group, amounted to about 2%.



CHAPTER 10

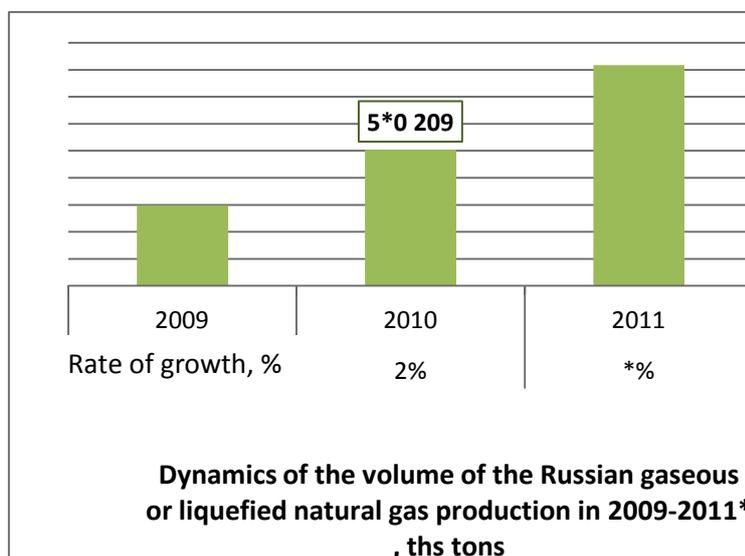
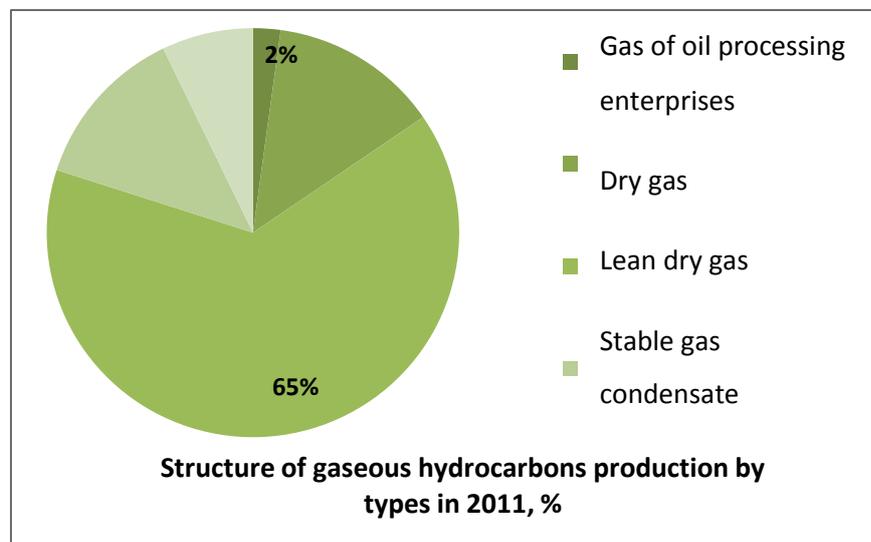
PRODUCTION OF OIL GASES
AND OTHER HYDROCARBONS IN
RUSSIA

Over one half of the Russian production was aimed at production of *** (**%). 13% of goods, produced in 2011 were represented by *** gas. Comparatively less shares belonged to petroleum gas – *%.

About *% in the structure of production belonged to gas condensate.

Since 2009 a positive dynamics of gaseous and liquefied natural gas production was marked. Compared to 2009 in 2011 26 mln tons more natural gas were

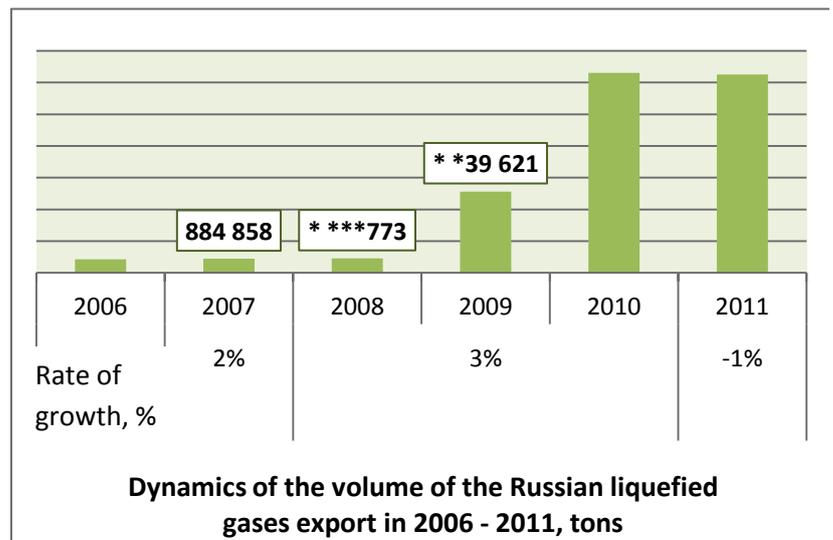
produced, 535,9 mln tons. Compared to the previous year, volume of extraction increased by *%.



CHAPTER 13

EXPORT OF LIQUEFIED GASES

Volumes of the Russian export of liquefied gases in 2009 increased sharply –5,6 times. In the following year the trend of this gas export increased 2,25 times till the level of ** mln tons. In 2011 volumes of supplies to the foreign market amounted to ** mln tons that was 1% less than in the previous year.



Export of liquefied gases in 2011 was represented by export of *** gas (**%). About 12% of all export supplies in physical terms belonged to liquefied propane. Supplies of butane amounted to *%



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E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 645-97-22