

Gas Trading Outlook in SE Europe

IENE Webinar, 8 June 2021

Gottfried Steiner, CEGH

15 YEARS OF CEGH:
THE MOST VIBRANT
MARKET PLACE
FOR NATURAL GAS IN CEE



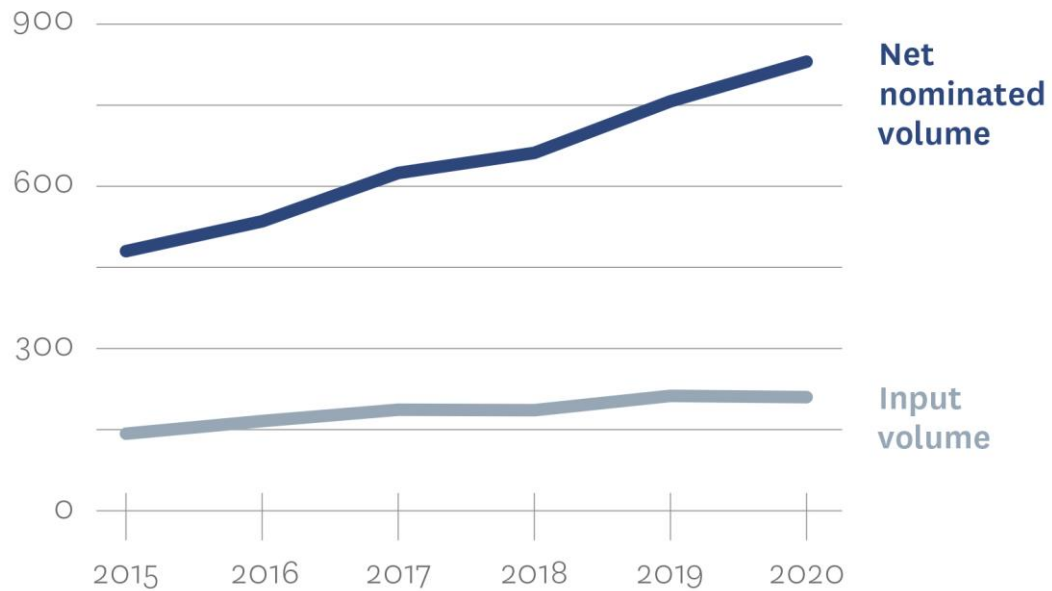
15 Years of CEGH

CEGH Volume since 2015



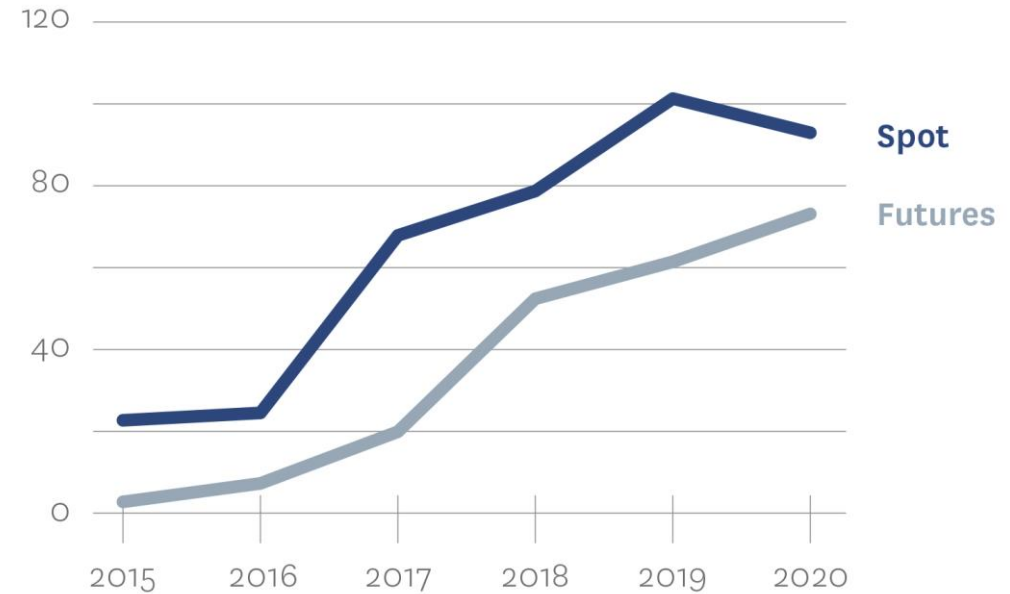
CEGH VTP AUSTRIA

Volumes in TWh



EEX CEGH AUSTRIA

Gas market volumes in TWh



CEGH Volume Development 1-12/2020



CEGH VTP:

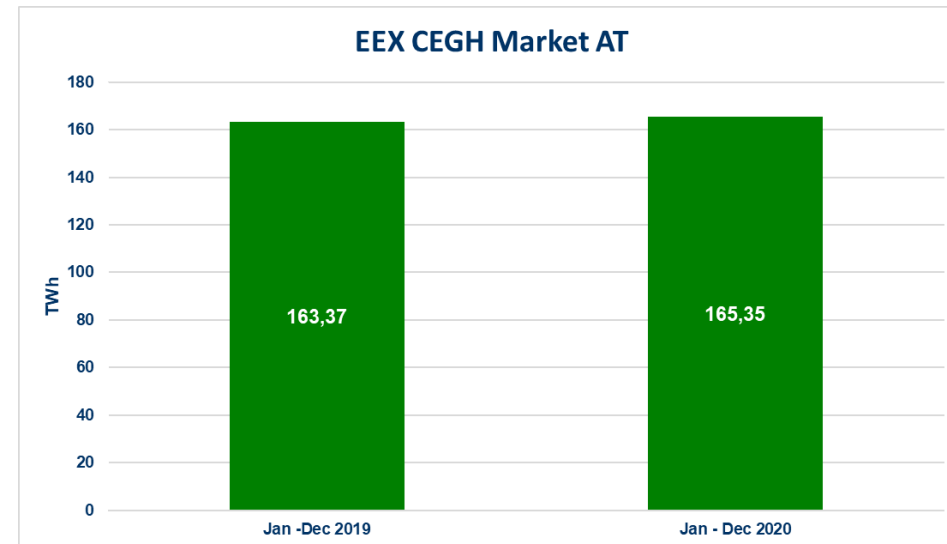
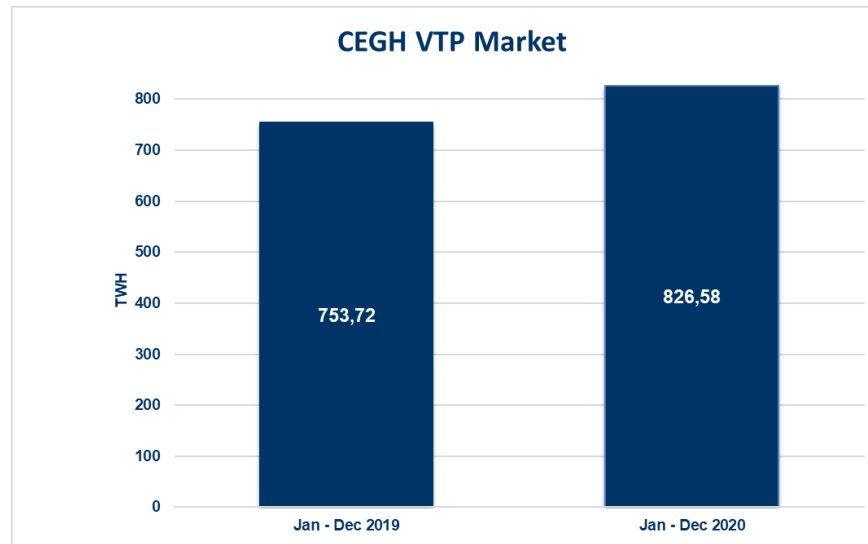
1-12/2020: 826.58 TWh

(y-t-y: **+9.7%**)

EEX CEGH Gas Market:

1-12/2020: 165.35 TWh

(y-t-y: **+1.2%**)



CEGH Volume Development 1-5/2021



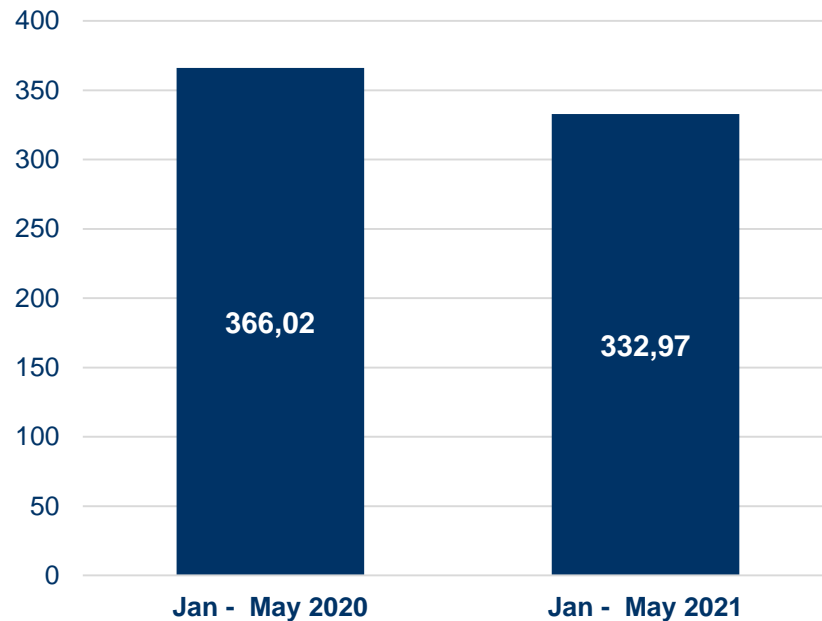
CEGH VTP:

1-5/2021: 332,97 TWh
(y-t-y: **-9,03%**)

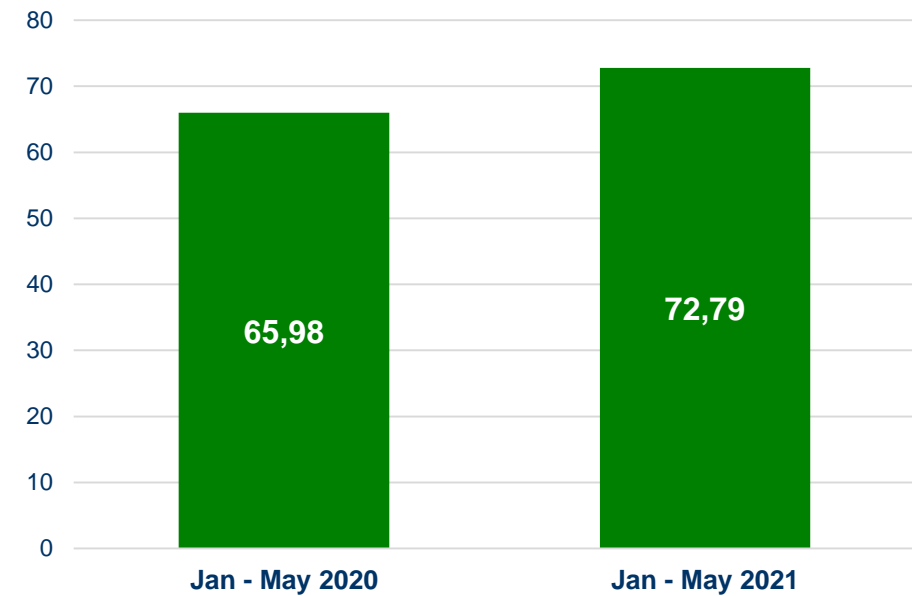
EEX CEGH Gas Market:

1-5/2021: 72,79 TWh
(y-t-y: **+10,32%**)

CEGH VTP Market



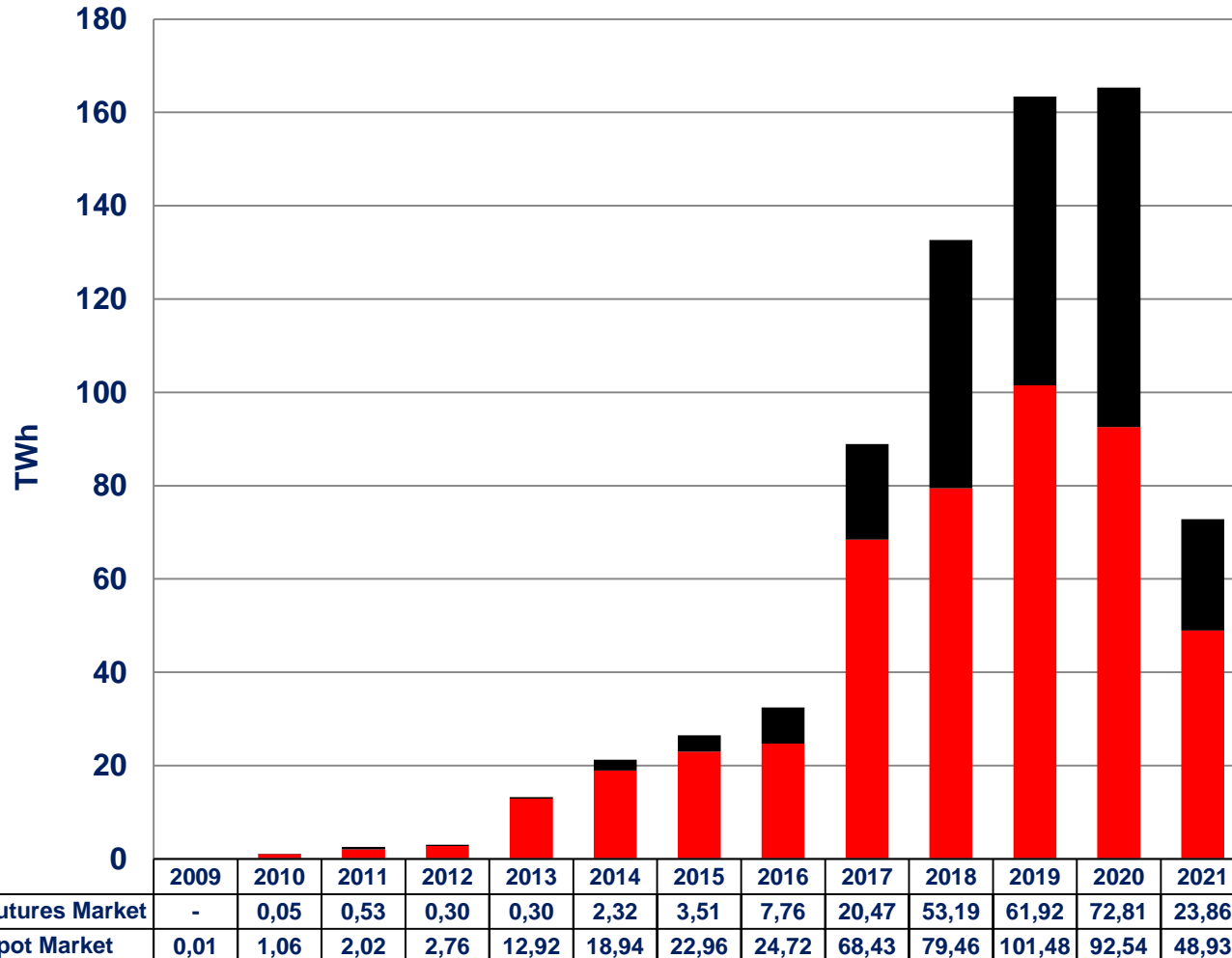
EEX CEGH Market AT



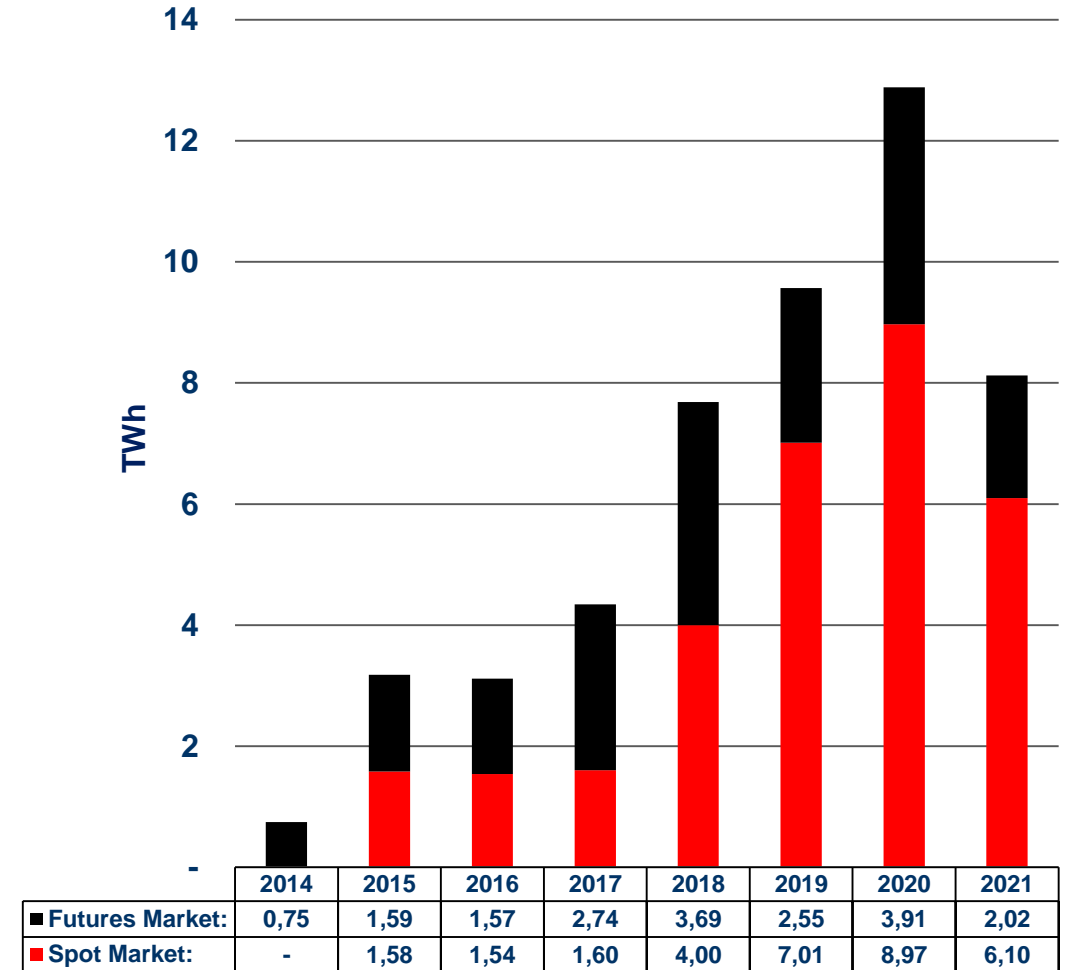
EEX CEGH Gas Exchange Markets: Yearly Trading Volume



Austria



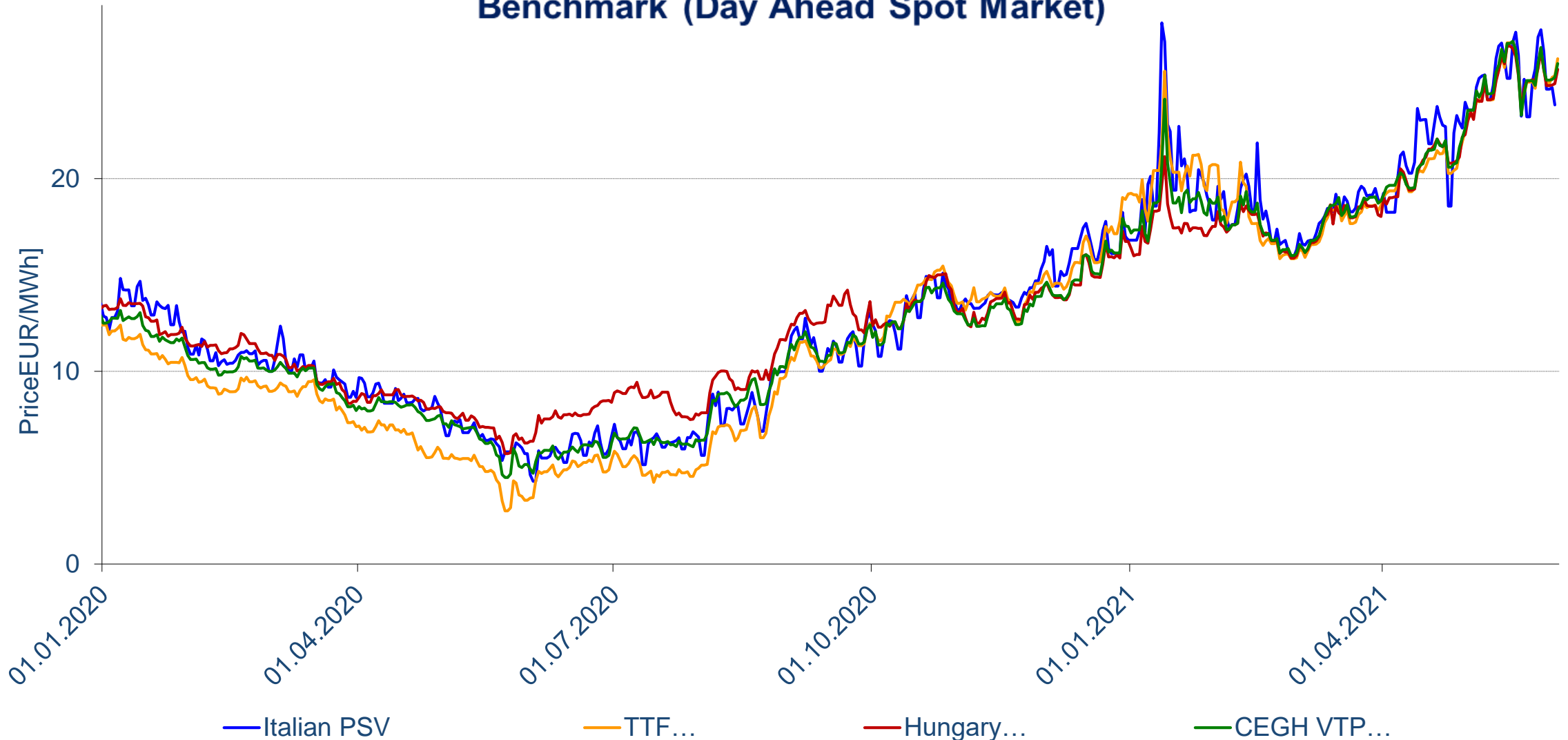
Czech Republic



Relation between European Gas DA Spot Prices since 2020



Benchmark (Day Ahead Spot Market)



Turkstream onshore extension in Bulgaria, Serbia and Hungary



TURKSTREAM ONSHORE EXTENSION IN BULGARIA, SERBIA, AND HUNGARY



- ◆ Interconnection point**
 - 1 Strandzha-Malkoclar
 - 2 Kirevo/Zajecar
 - 10 Baumgarten
- ⊗ Compression station**
 - 3 Provadia compressor station
- ◆ LNG import terminal**
 - 4 Krk LNG*
 - 14 Revithoussa LNG
 - 15 Alexandroupolis FSRU*
 - 20 Aliaga Izmir LNG/ Aliaga Etki Neptune
 - 21 Marmara Ereglisi
- Gas field**
 - 17 Neptun gas discovery
- Existing pipelines**
 - 5 Strandzha-Provadia pipeline (reverse flow conversion)
 - 8 TurkStream
 - 9 Link to existing pipeline, plus new 11 km pipeline to Strandzha
 - 11 Onshore continuation of first TurkStream leg
 - 12 TANAP
 - 23 Slovakia-Hungary interconnector
- - - Planned pipelines**
 - 6 403km pipeline within Serbia
 - 7 484km pipeline from Provadia-Serbian border
 - 13 TAP
 - 16 Interconnector Greece-Bulgaria
 - 18 BRUA pipeline
 - 19 Bulgaria-Serbia interconnector
 - 22 Moldova-Romania interconnector

Source: S&P Global Platts, 07 January 2021

**Thank you very much
for your attention**

