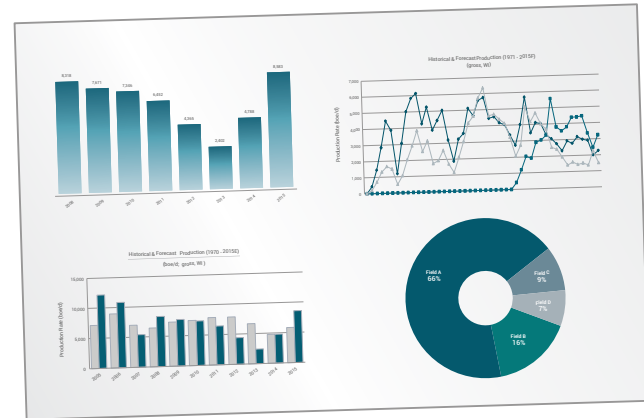




## Gas Supply & Demand Study, Central Asia

### Project Overview

In support of a "Country **Bene-fit** Analysis" study for a proposed large petrochemical plant and in cooperation with government institutions, Petrenergia undertook a long-term, country-wide gas supply and demand study to provide project investors and **fi-nanciers** with an independent assessment of the regional gas market. This included highlighting areas of potential feedstock shortfall in the future and how these might be mitigated.



### Petrenergia's Approach

#### GAS SUPPLY

- ... Estimated the total discovered gas resources
- ... Evaluated the conventional and unconventional gas exploration potential
- ... Prepared Low, Mid and High gas supply forecasts
- ... Assessed the main uncertainties, potential threats and upside opportunities
- ... Reviewed infrastructure & assessed losses

#### GAS DEMAND

- ... Evaluated the regional energy markets
- ... Established gas utilisation profile and trends based on available historical data, GDP, and population growth projections
- ... Validated government demand projections and checked for consistency with future energy policies
- ... Prepared scenario-based Low, Mid and High gas demand forecasts by market sector
- ... Identified potential shortfall between future supply and demand projections and recommended measures to balance the market



### Outcome and Client Benefit

The conclusions and recommendations from this unique study were incorporated into key documentation leading towards a final investment decision.

