



# **Indian Natural Gas Sector**

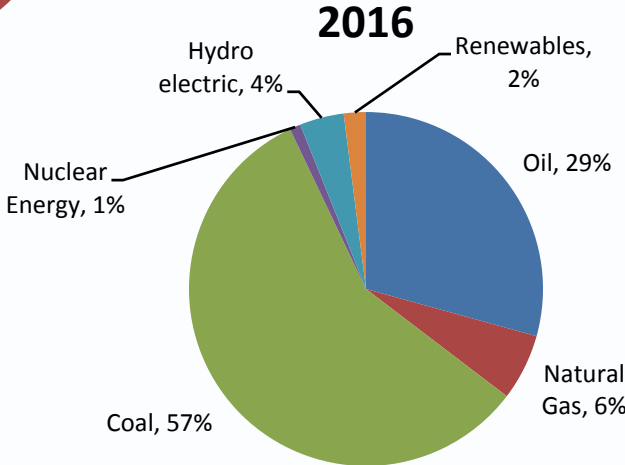
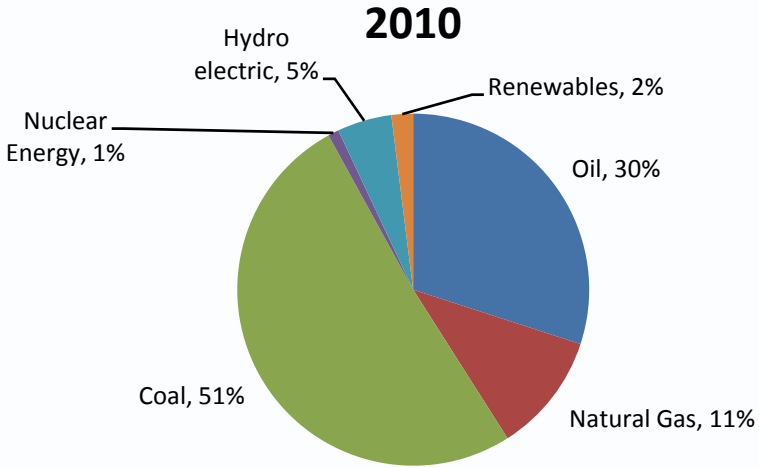
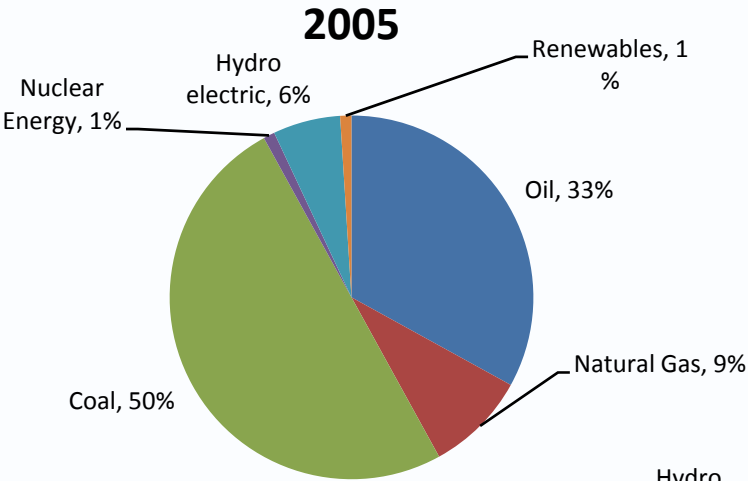
## Global Primary Energy Basket – A Comparison

Region	Oil	Natural Gas	Coal	Nuclear Energy	Hydro electric	Renewables	TPE (MTOE)
<b>World</b>	33.3%	24.2%	28.0%	4.5%	6.8%	3.2%	<b>13376</b>
<b>OECD</b>	37.7%	27.0%	16.5%	8.1%	5.7%	4.9%	<b>5529</b>
<b>Non- OECD</b>	30.1%	22.1%	36.4%	1.9%	7.7%	1.9%	<b>7747</b>
<b>Asia Pacific</b>	27.9%	11.7%	49.4%	1.9%	6.6%	2.6%	<b>5579</b>
<b>China</b>	19.0%	<b>6.2%</b>	61.8%	1.6%	8.6%	2.8%	<b>3053</b>
<b>India</b>	29.4%	<b>6.2%</b>	56.9%	1.2%	4.0%	2.3%	<b>724</b>
<b>Bangladesh</b>	20.3%	76.4%	2.5%	-	0.6%	0.1%	<b>32</b>
<b>Pakistan</b>	33.0%	49.2%	6.5%	1.5%	9.3%	0.5%	<b>83</b>

(Source: BP Statistical World energy Review, 2017)

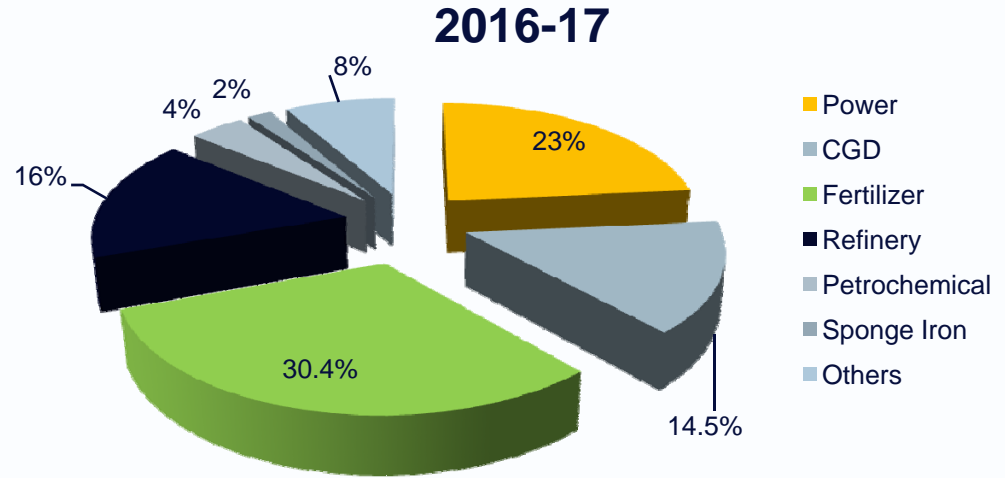
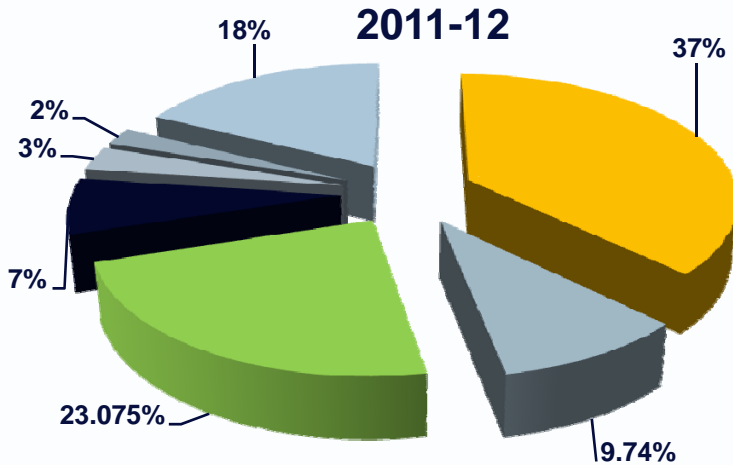
- India is the 3rd largest energy consumer after China and US, 2nd in Coal and 3rd in Oil.
- Natural gas consumption in India is 6.5% against World average of 24% (14th largest consumer)

# India's Changing Primary Energy Basket (2005 to 2016)



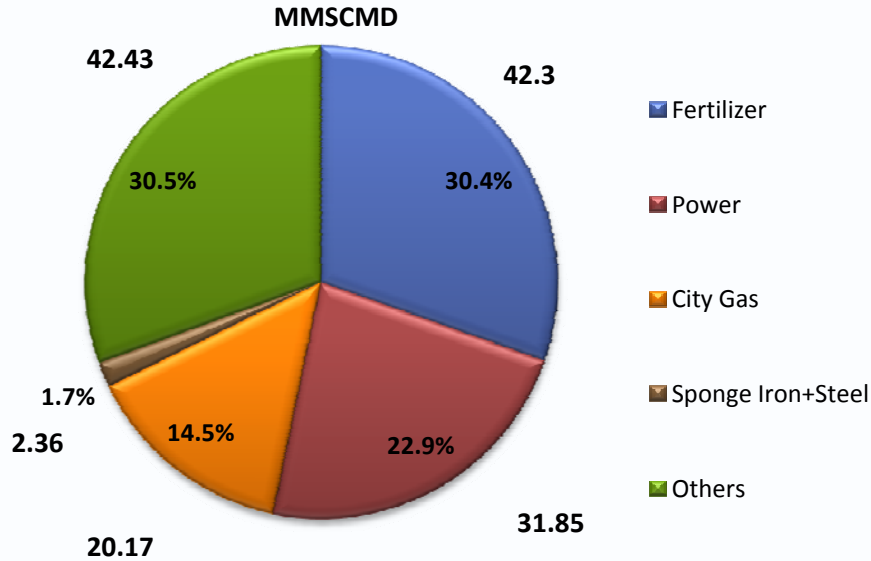
(Source: BP Statistical World energy Review)

# Sector Wise Natural Gas Consumption in India

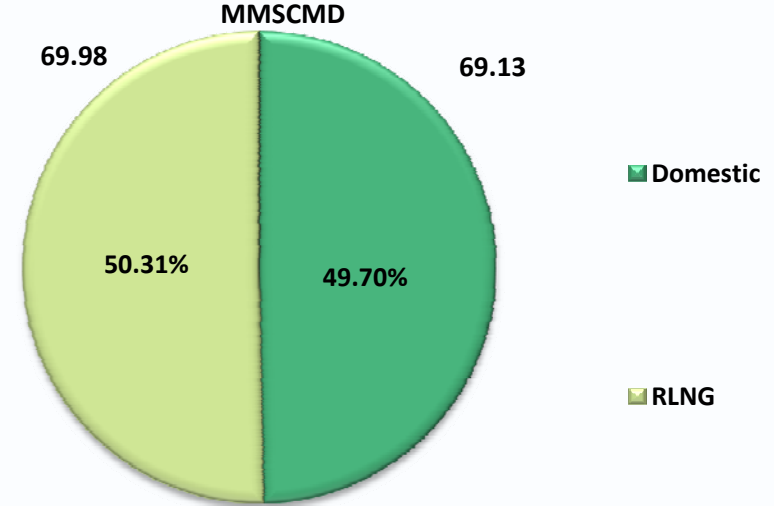


# Natural Gas in India is primarily used in Power, Fertilizer and City Gas

## Sector-wise Break-up (2016-17)



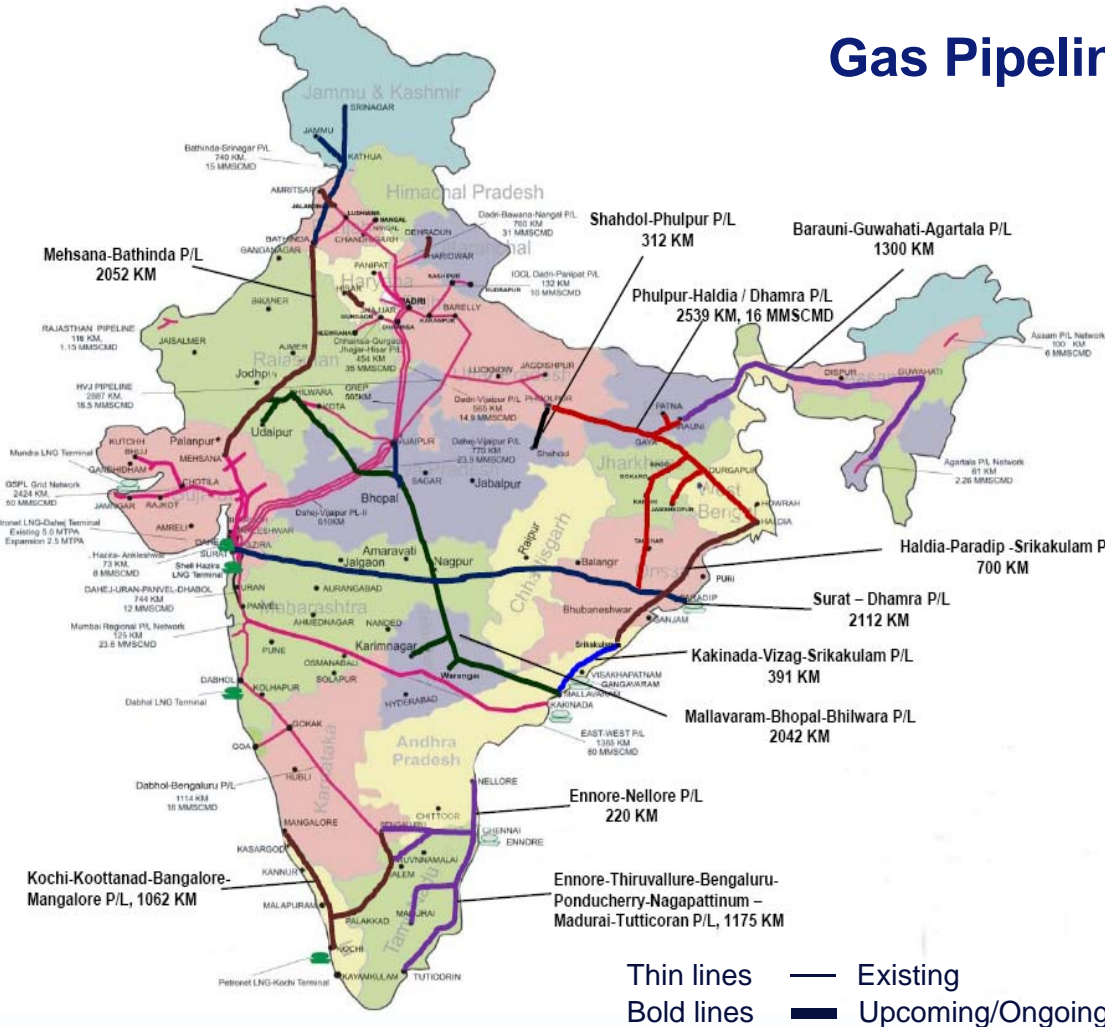
## Gas-wise Break-up (2016-17)



**Gas consumption during FY (2016-17), ~139 MMSCMD**

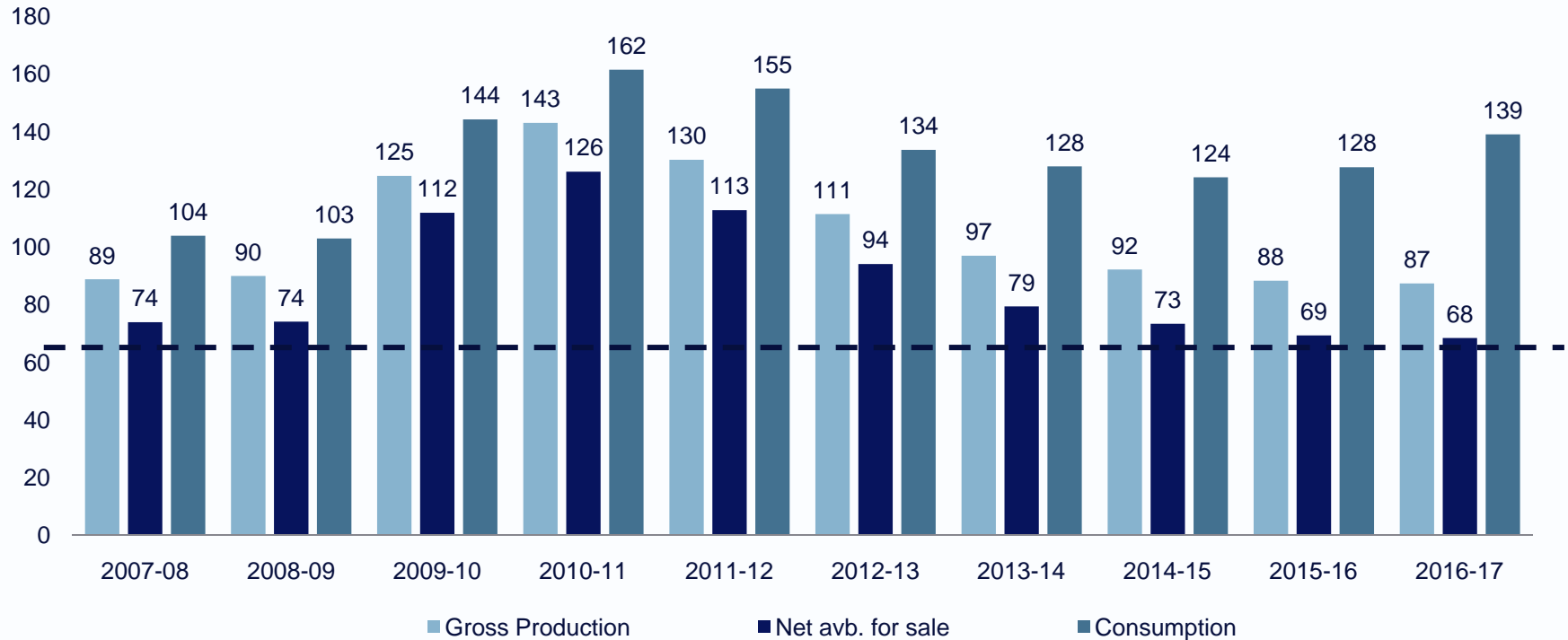
\* Others includes Refinery, Petrochemicals, LPG, IC and Manufacturing etc.

# Gas Pipeline infrastructure in India



Category	Length & including Spurlines (Km)	Design Capacity (MMSCMD)
Existing Network	~ 16,565	387
Under Construction	~ 4600	69
Awarded but not started	~ 9500	425
<b>Total</b>	<b>~ 30,665</b>	<b>860</b>

# Declining domestic production is a major concern for Indian gas market



LNG consumption has increased but price affordability is still a challenge for Indian Gas market

# LNG imports have consistently increased over the years

