



LNG Market Development in Poland

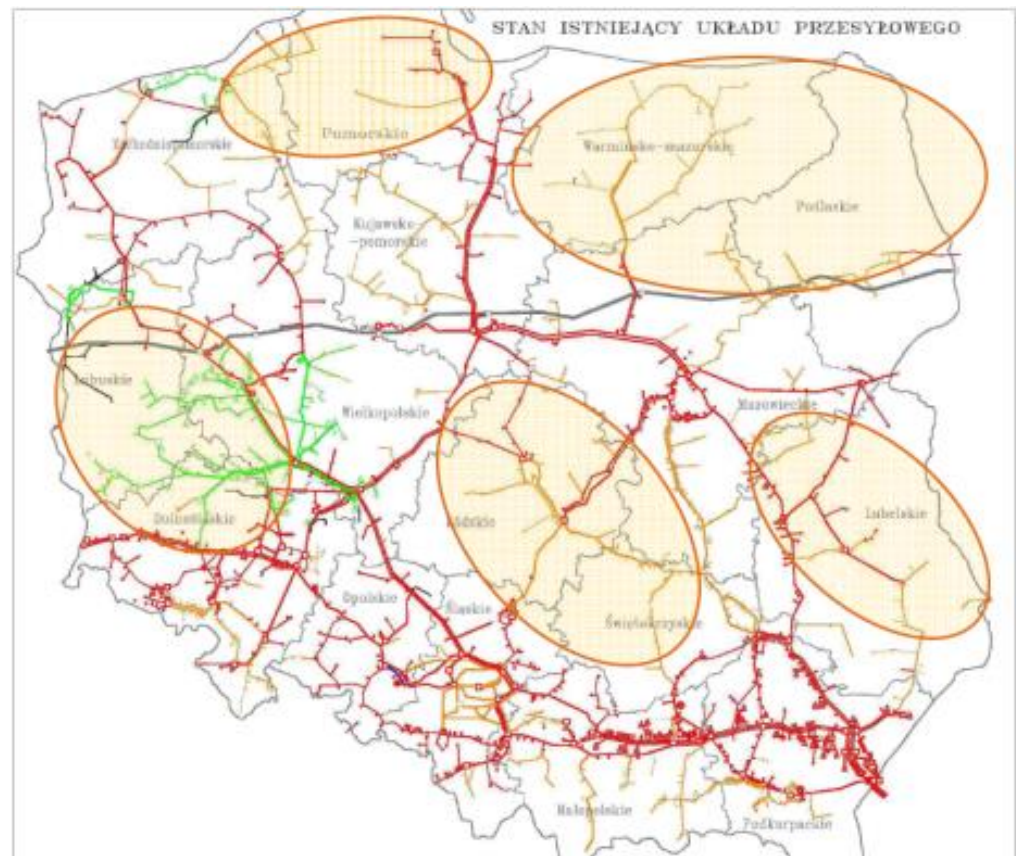
Current Status & Development Assumptions till 2020

IN Warsaw Office

We give local ideas global opportunities

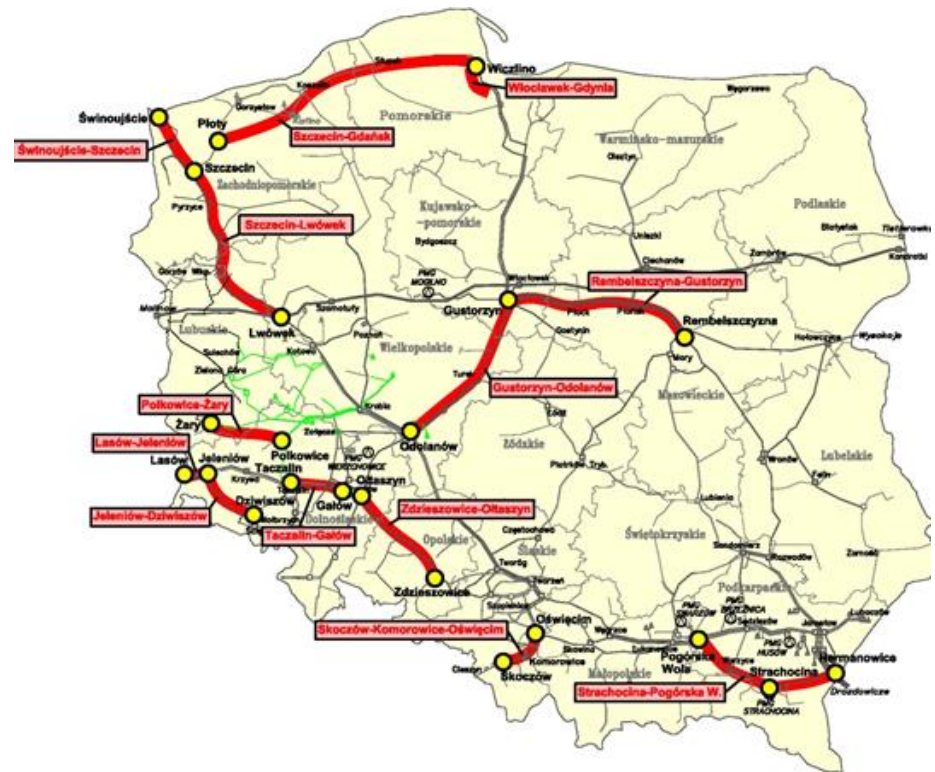
Undeveloped transmission network -> remote areas potential

- Undeveloped transmission network creates potential for LNG deliveries

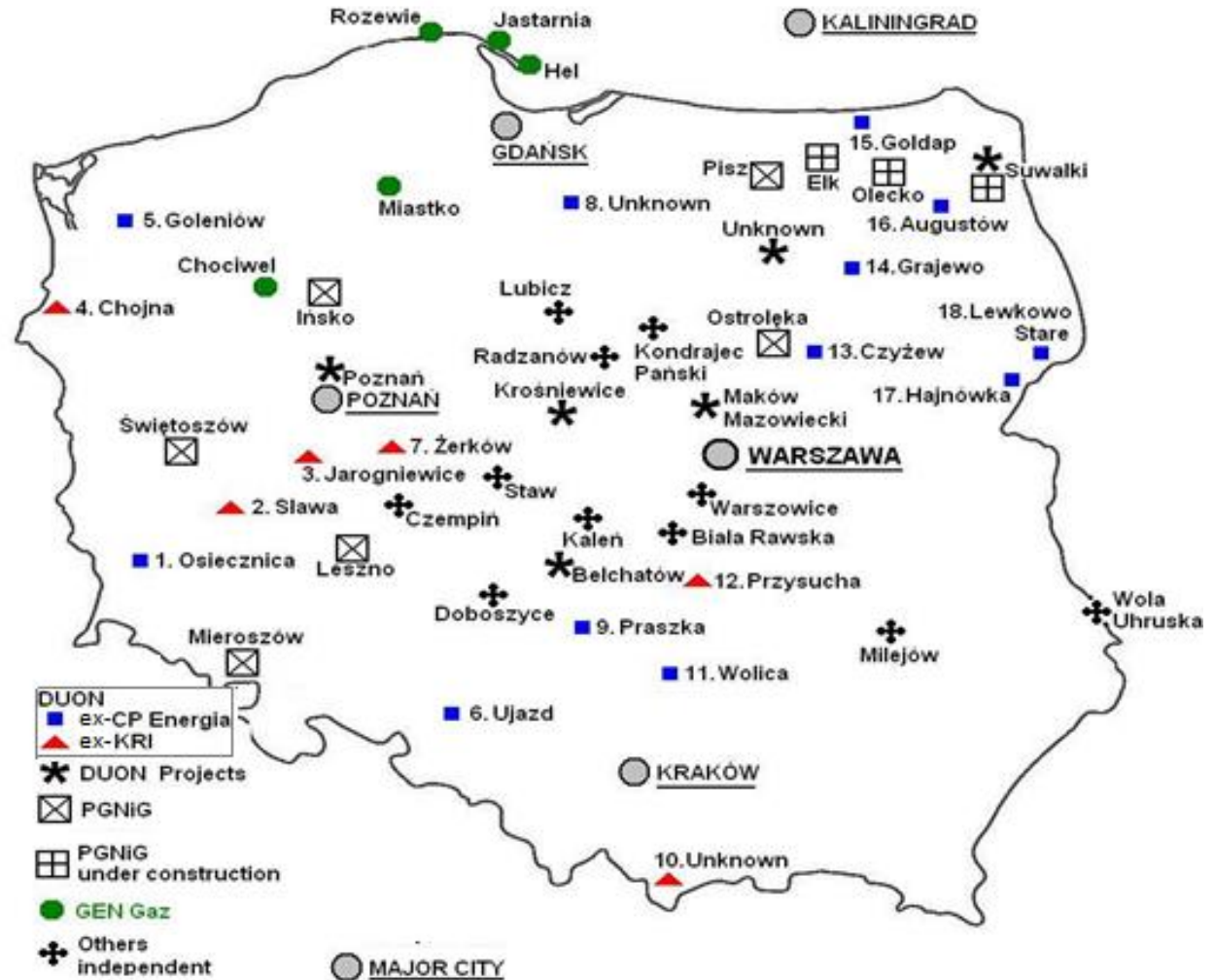


Gas transmission development until 2015

- Majority of current investments in natural gas transmission pipelines in Poland (red lines) are implemented due to a construction of LNG terminal



There are 41 small regasification units in Poland



Regas Satellite Station – example

Location: Biała Rawska

- Completion: 2011
- Owner: Ybbstaler
- Client: Ybbstaler
- Role: Fruit and vegetable juices production
- Storage capacity: 1 x 45 m³ LNG
- Natural Gas flow rate: 500 m³/h
- LNG annual consumption: 800 t



Most promising areas of LNG business development up to 2020

- Large enterprises direct supplies from LNG
- Terminal
- Gasification of remote areas
- Pregasification
 - Initial investments toward further development of residential and industrial areas
- Fuel source for small and medium enterprises
- Peak shaving
- Temporary fuel for industry/households
- Ship fuel (Baltic Sea Region)
- Public transport fuel

