

ERRA Webinar

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REGULATION OF LNG SUPPLY AND TERMINALS

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EgeGaz Aliaga LNG Terminal

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ERRA Webinar on Regulation of LNG Supply and Terminals

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Introduction

- ❑ EgeGaz, a company within Çolakoğlu Group, is the owner and operator of EgeGaz Aliğa LNG Terminal.
- ❑ EgeGaz is the first private entity at investing in the Turkish natural gas sector.

Some key information about EgeGaz Aliaga LNG Terminal:

- Located at Aliaga, north of Izmir on the Turkish Aegean Coast,
- Started operation in 2006,
- Two full containment tanks of 140.000 m³ each,
- Regasification capacity of 40 mioSm³/day, (1,4 bcf/day)
- Jetty available for largest volume vessels,
- LNG loading to trucks and vessels.

Location



- ❑ EgeGaz is granted storage, wholesale, import and export licenses by EMRA.
- ❑ EgeGaz provides LNG regasification services in accordance with the Basic Usage Procedures and Principles approved by EMRA.
- ❑ Besides LNG regasification services, supplies natural gas and LNG to various customers such as;
 - Industrial plants,
 - Power producers,
 - Wholesale companies,
 - City distribution companies,
 - Ship operators.
- ❑ EgeGaz contributes to supply diversification and helps to improve national gas supply security.

Unloading



Process Area



Truck Loading



Ship Loading



LNG by Truck

- ❑ Delivery by truck started in 2002 and provides LNG to more than 4.000 end-users. (500 mcm/y, abt. 25000 trucks).
- ❑ Mainly used in enterprises that are not connected to natural gas network for construction, agriculture, livestock, tourism and production industry activities.
- ❑ In this context, emerging small scale LNG markets in Southern Europe can improve small scale LNG exports from Turkey.

Marine Fuel LNG

- ❑ A transition from conventional fuels to LNG is likely to start for ships due to reducing GHG emissions.
- ❑ Considering the increasing number of merchant ships passing through the Black Sea, Aegean and Marmara Sea, Turkey is expected to benefit developments in the Global Marine Fuel LNG sector.
- ❑ EgeGaz is getting ready to contribute to the development of LNG as a marine fuel based on its available infrastructure and experience.

Vehicle Fuel LNG

- ❑ Heavy vehicle models with LNG engine options of all leading manufacturers have already been put on the market.
- ❑ Turkish LNG fuel stations, currently in development stage, could be part of the blue corridor in Europe, from the southeast end.

Turkish LNG Market

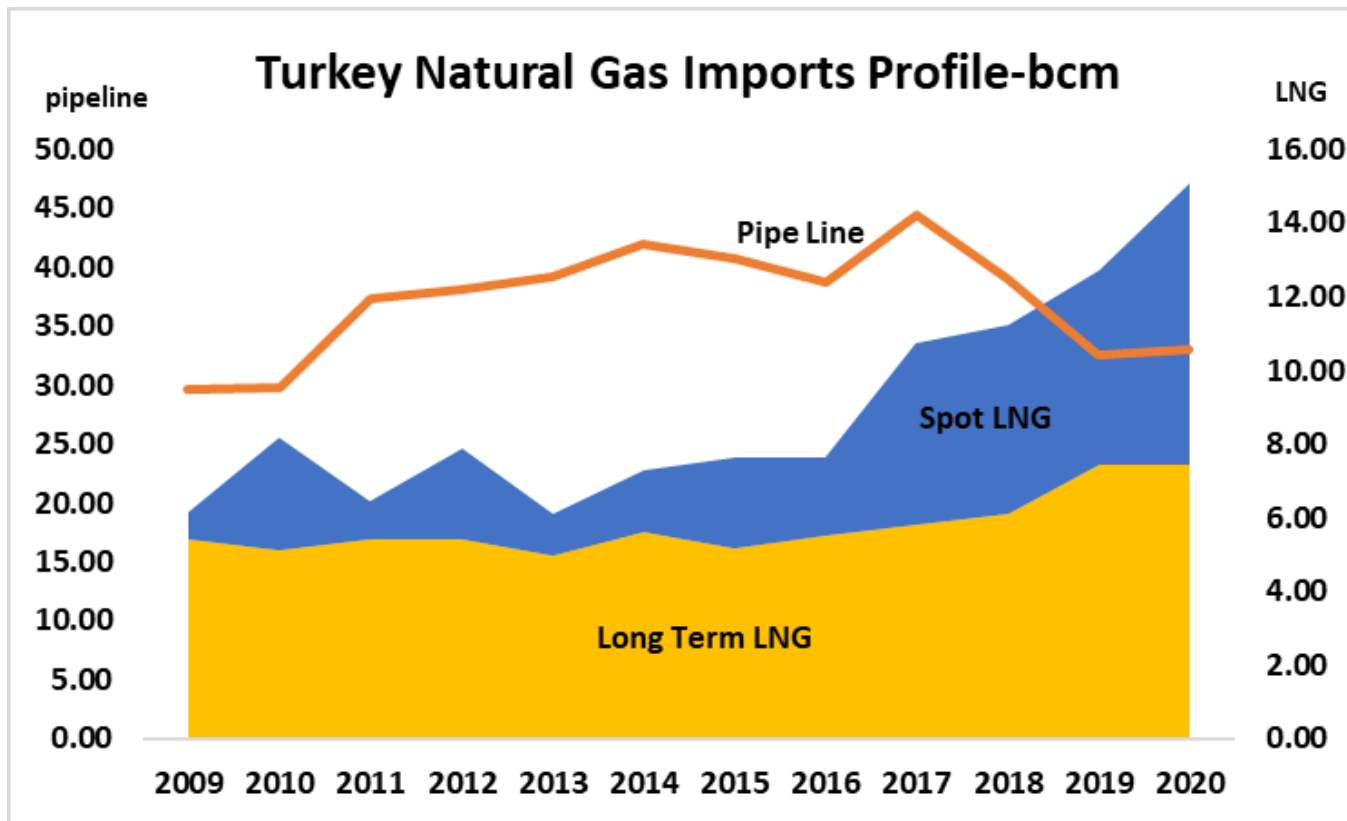


- ❑ Turkey has improved its LNG infrastructure last five years and today can supply 50% of daily demand with LNG.
- ❑ LNG share in total gas supply mix has been average 31% in 2020, hit 44% for some short period.

Turkey LNG Imports



LNG, while developing globally, absolutely plays a bigger role than before within Turkish natural gas supply portfolio.

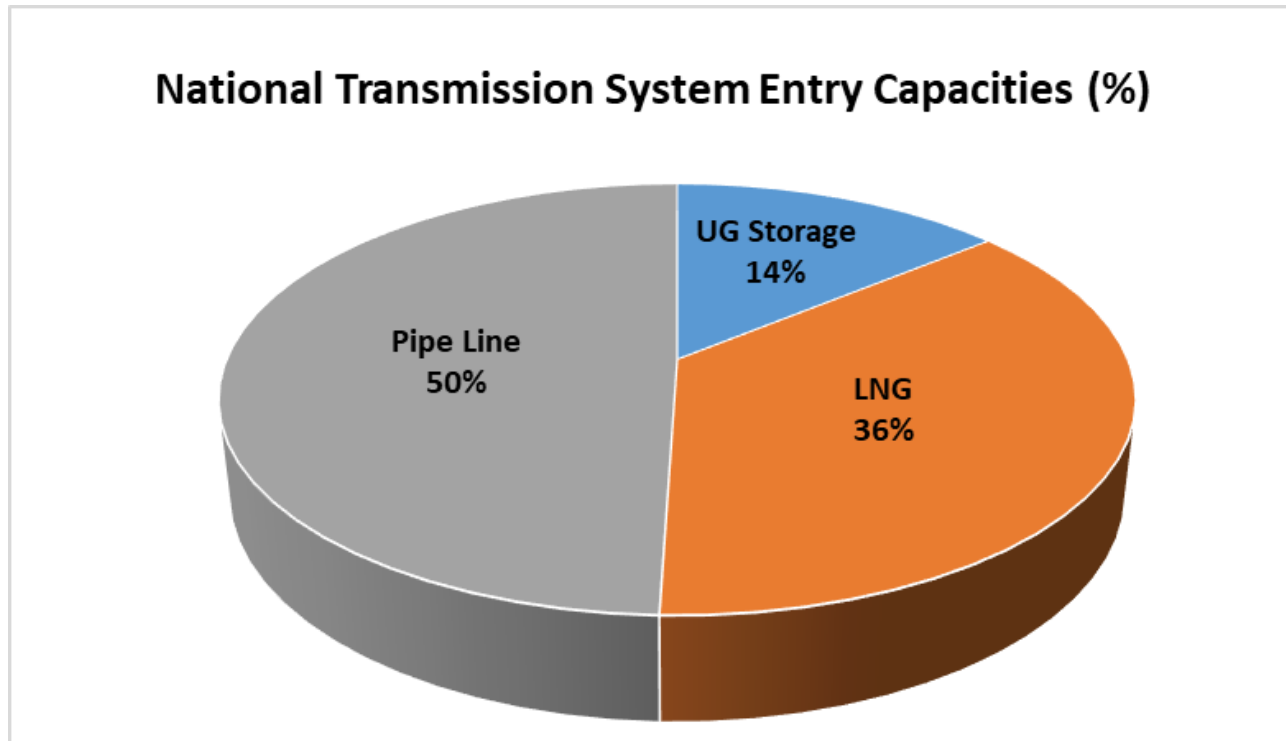


*EgeGaz is among
the most reliable
supply points for
Turkey since
2006*

Source: EMRA Monthly Natural Gas Market Reports-2020

LNG vs Entry Capacities

Turkey's LNG import ability has reached significant levels compared with Global benchmarks.



Source: BOTAŞ

EgeGaz can provide %12,5 of total entry capacity of national gas grid.

- ❑ Environmentally friendly natural gas, assumed to be blue before, is on its way to convert to green.
- ❑ In the energy industry, it has long been accepted that natural gas, the cleanest fossil fuel, will serve as a “bridge fuel” to a low-carbon future.

**THANK YOU
FOR YOUR ATTENTION!**

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