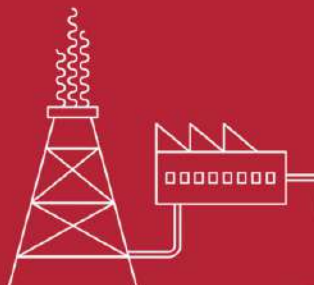




TANSU DESTANOĞLU
General Manager

UESTCO Energy Systems

CONTEMPORARY
TURKISH LNG MARKET &
TECHNOLOGY IN
ROAD TRANSPORTATION



[Warszawa - 28 listopada 2019 r.]

Polska Platforma LNG 2019



[Warsaw - 28 November 2019]

Polish LNG Conference 2019

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Who is UESTCO?



UESTCO has been serving to industrial sectors since 2006.

Its expertise in gas process applications and its multidisciplinary approach has brought many successes.

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UESTCO's Areas of Businesses

Products



Industrial Gas Detectors



LNG Refueling Dispenser

Projects



Industrial Natural Gas Processes



Turnkey LNG & CNG Refueling Stations



LNG Satellite Plants



LNG SKID & Containers



Automation & SCADA Solutions



RMS SKID Systems



LNG Satellite City Gate Plants



Customized SKID Systems

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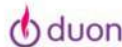
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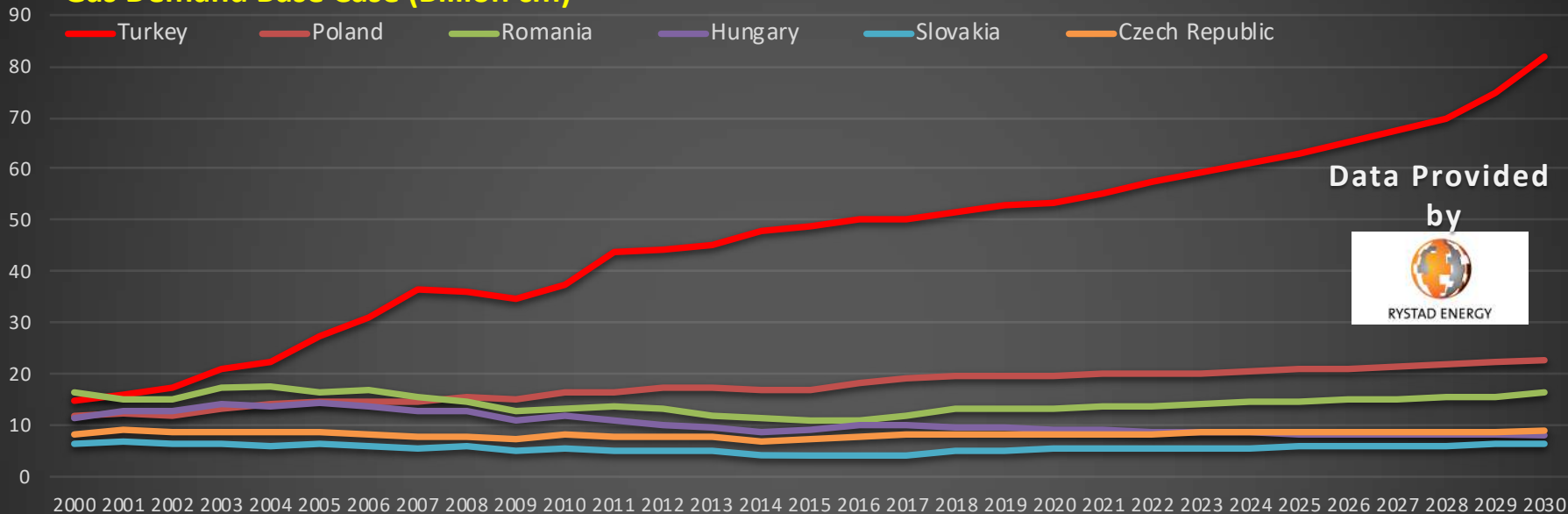
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Demand for Natural Gas in TURKEY

Gas Demand Base Case (Billion cm)



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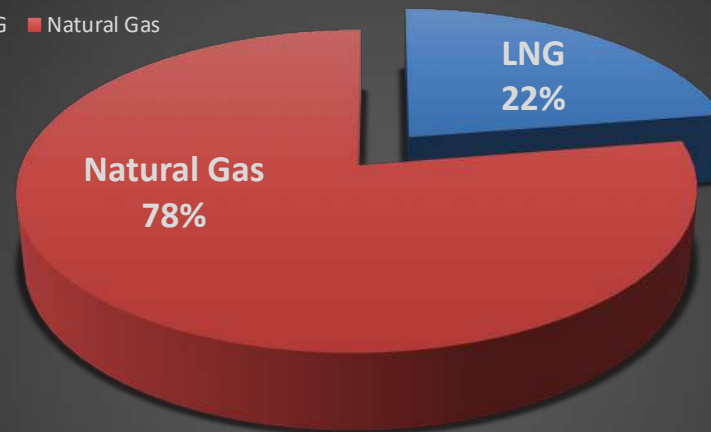


Gas in Use by Type in TURKEY

Years	Natural Gas		LNG		TOTAL
	Quantity (in Million Sm3)	Share(%)	Quantity (in Million Sm3)	Share(%)	Quantity (in Million Sm3)
2013	39.419,44	87,08	5.849,54	12,92	45.268,98
2014	41.981,41	85,22	7.280,87	14,78	49.262,28
2015	40.778,11	84,21	7.648,96	15,79	48.427,08
2016	38.724,48	83,54	7.627,68	16,46	46.352,17
2017	44.484,67	80,52	10.765,28	19,48	55.249,95
2018	39.032,13	77,51	11.328,45	22,49	50.360,58

Use of Gas by Type

■ LNG ■ Natural Gas



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Turkey LNG Import Facilities



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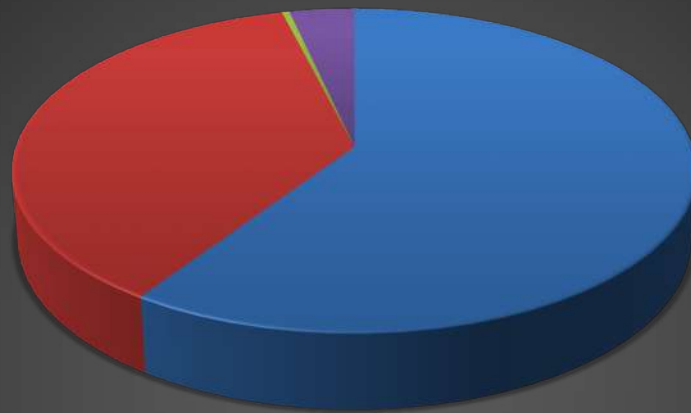


LNG Utilization in Turkey

Areas of LNG use in Turkey by order in 2018:

1. Power Generation: 59.37 %
2. Industrial use: 36.69 %
3. Small-Scale City plants: 3,54 %
4. Transportation (Marine): 0.4 %
5. Transportation (Road): 0 %

LNG Use Distribution in Turkey



- Power Generation
- Industry
- Marine Transportation
- City Gate Plants
- Road Transportation

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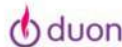
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Small-Scale Bulk Satellite Plant Market in Turkey

- Market started in 2003, peaked in 2009 and stabilized.
- After 2012, the market has reached its saturation
- +4000 satellite plant has been installed between these years.
- Around +10 distribution companies
- A huge logistics capability with hundreds of LNG trailer serving 85% of total landscape of the whole country



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Application Images of Small-Scale Bulk Satellite Plants



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Turkish LNG Market's Two Major Inabilities

1. Re-exporting stock LNG

2. Use of LNG in Road Transportation

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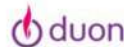
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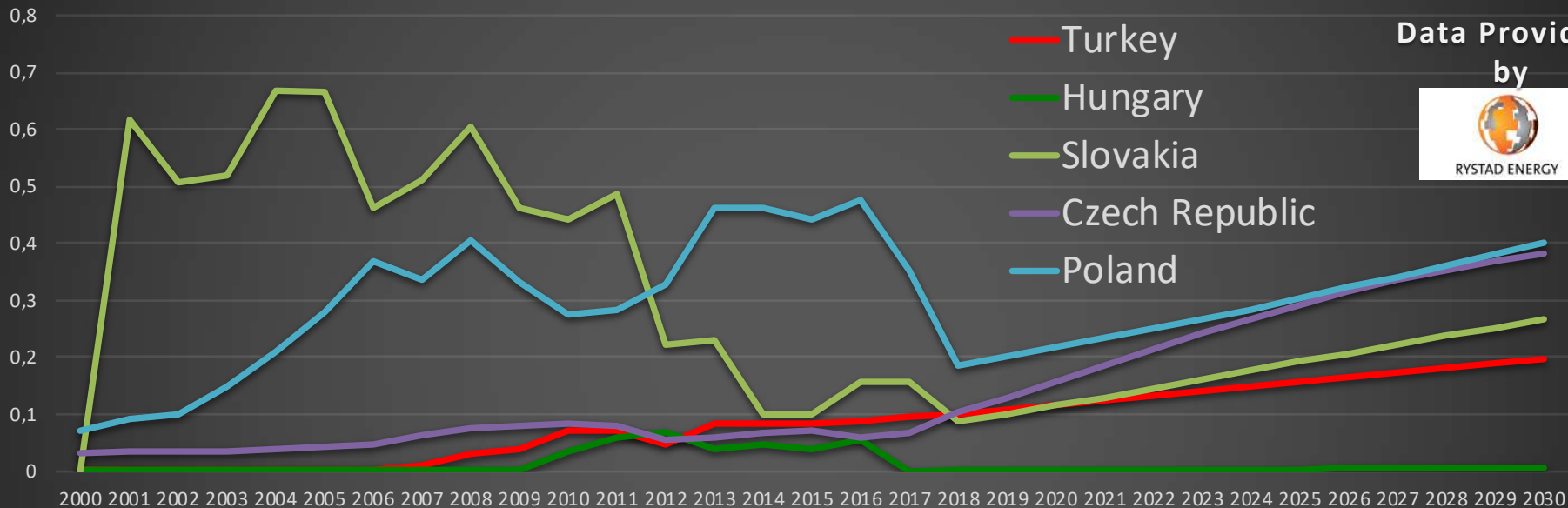
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LNG Use in Transportation

Gas Demand Base Case (Billion cm)



LNG in Transportation (Marine and Road Transportation)

- Turkey
- Hungary
- Slovakia
- Czech Republic
- Poland

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A New Phenomenon for Turkey: LNG in Road Transportation

A New Phenomenon

LNG FUEL

Currently no public sales, no competition in LNG refueling for road transportation

No investment in LNG powered vehicles

Busy routes of approximately +10,000 long vehicles moving daily between Ankara-Istanbul

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Close View to LNG in Transportation

Advantages and Challenges

LNG FUEL

- Strong infrastructure & LNG distribution networks
- Relatively long history with LNG
- Local LNG tech-solution companies are available
- Technological challenges for end-users & investors

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Using the Experience in Europe

200th LNG Refueling Station of Europe



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The Most User-Friendly Dispensing Solution



15" Sun-Light Protected 1200 NIT Screen

Step by step guidance to truck drivers to ease the LNG refueling process

All languages available

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What Can Be Done For Easy Refueling?



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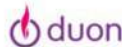
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Thank You For Your Attention!

Any questions?



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