



Bundesministerium
für Wirtschaft und Arbeit

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**Report on the Development of the Gas Industry in
the Federal Republic of Germany in 2004**

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1. Share of natural gas in German primary energy consumption

1991	16,7 %
2002	21,7 %
2003	22,4 % (Oil - 36,4 %, Coal - 25,1 %)
2005	25,1 % expected



2. Sources of supply 2002 (2003 estimated)

31 % (32)

19 % (17)

25 % (26)

7 % (7)

82 % (82)

18 % (18)

Russia

The Netherlands

Norway

Danmark, United Kingdom

Imports

domestic production



3. Consumption 2003

49 %	households and small consumers
24 %	industry
13 %	electricity generation
5 %	district mating
5 %	others
4 %	exports



4. Cross-border-prices 2004: + 6 %

5. Investments: 1,7 B€

73 % network

10 % underground storages

**6. 43 underground storages with 19,7 Bcbm
working capacity**

3 storages projected or under construction



7. Regulatory framework

First EU Gas Directive 98/30/EC fully implemented since 21 May 2003. Negotiated access to networks.

Implementation of Second EU Gas Directive 2003/55/EC under work. In force expected spring 2005. Unbundling, Regulated network access, Regulatory Authority.