وزارة النفط والغاز

وحدة دعم التنفيذ والمتابعة

Oman Gas Supply and Demand

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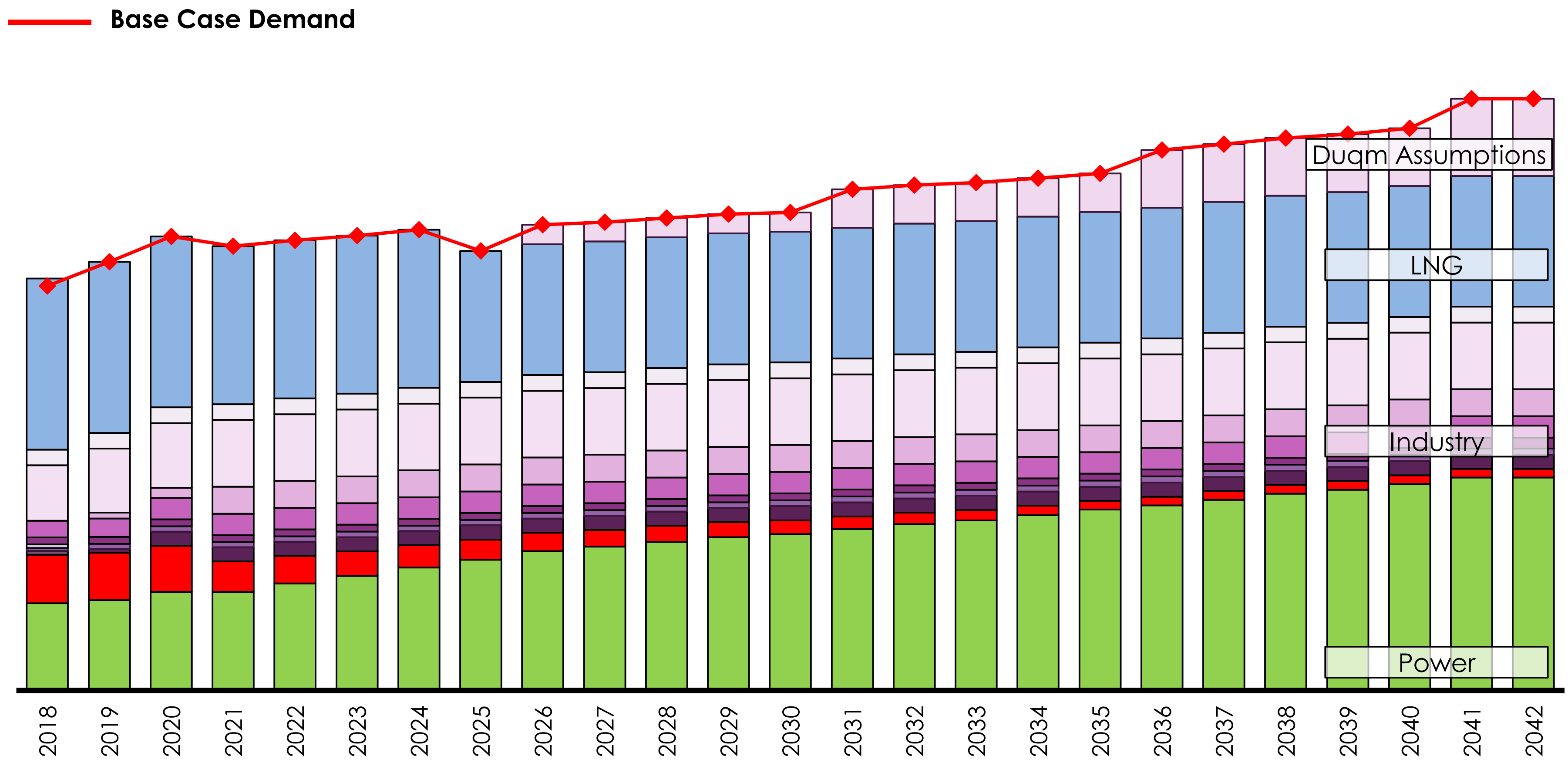
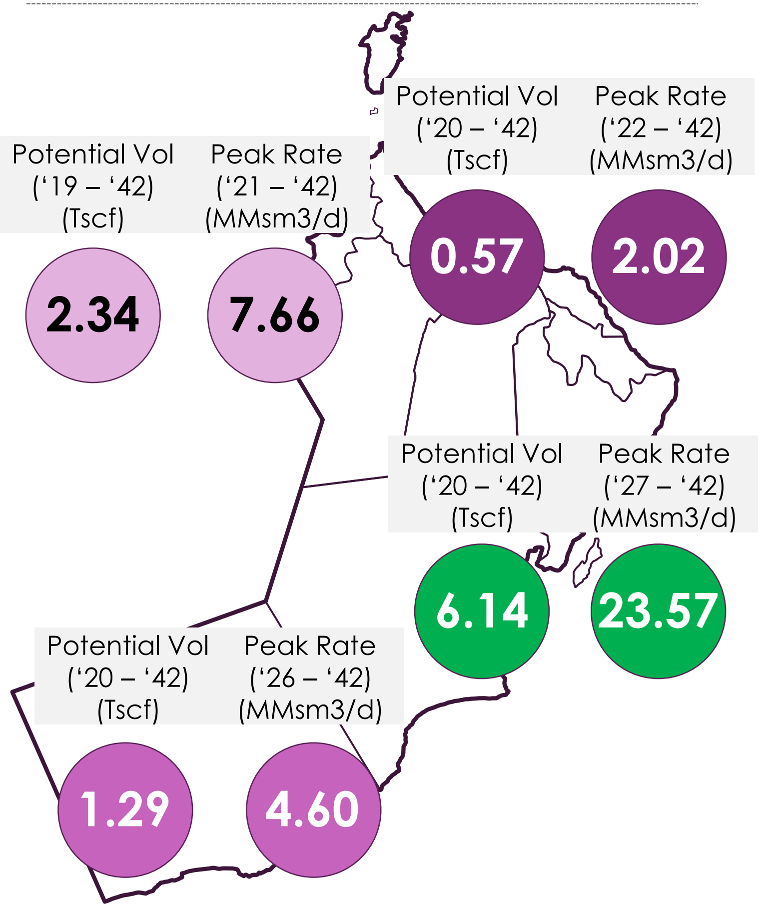
The base case demand as a starting point includes Power Demand (OPWP Sep 2016), GSA extended terms and Additional Duqm Growth



Source: Ministry of Oil and Gas, Lab Analysis

The lab consolidated existing and new project lists from free zones and industrial estates that will provide a better picture of potential demand

Potential Total Volume and Peak Volume



Disclaimer – all potential project lists consolidated has different maturity level (some are wish list). The potential project lists must be continuously updated

Potential Project Lists (Non- Exhaustive)

Industrial Estates

1. Russail
2. Sohar
3. Nizwa
4. Raysut
5. Sur
6. Thumrait
7. Samail
8. Shinas
9. Buraimi
10. Khasab

Sohar

1. Florex
2. Shadeed Steel (additional existing)
3. Shadeed Steel (new expansion)
4. Oman Indian Co for AL
5. Oman Aluminium Cast
6. Synergies Casting

Special Economic Zone Authority Duqm

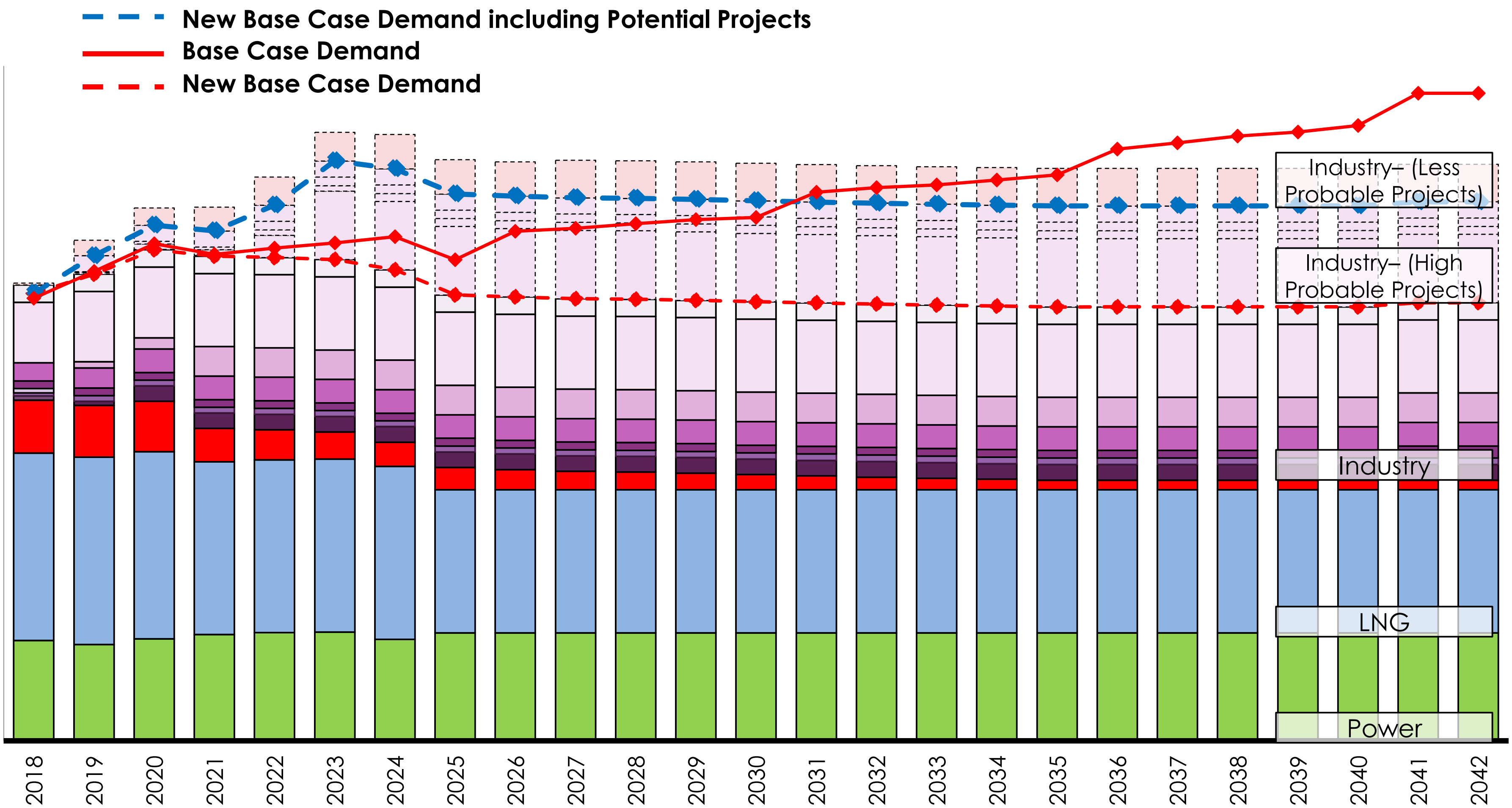
1. Sebacic Bio Diesel (Caster Oil)
2. Wangfang Methanol Factory & Power plant
3. Al Wusta Cement Factory (Phase 1 & Phase 2)
4. Wangfang Medium Industries
5. Duqm Cement Factory
6. Gas to Liquid
7. Future Urea Fertiliser
8. Future Bitumen Plant
9. Future Steel Plant
10. Future Chemical Plant
11. Petrochemical Plant
12. Acetic Acid

Salalah Free Zone

1. Dhofar Global Cement
2. Octal
3. Associated Industries Oman
4. Zawawi Drywall LLC
5. Salalah Methanol (Ammonia)
6. Carmeuse FZCO
7. Gulf Guar Gum
8. Global Gypsum
9. Oman Milk Diary Products
10. Batec
11. Rovia Pharma
12. Philex Pharmaceuticals
13. Al Namariq for Mining
14. Healthy Beverages
15. Overall Global General Trading's
16. Projected Heavy Industries
17. Projected Medium Industries
18. Projected Light Industries

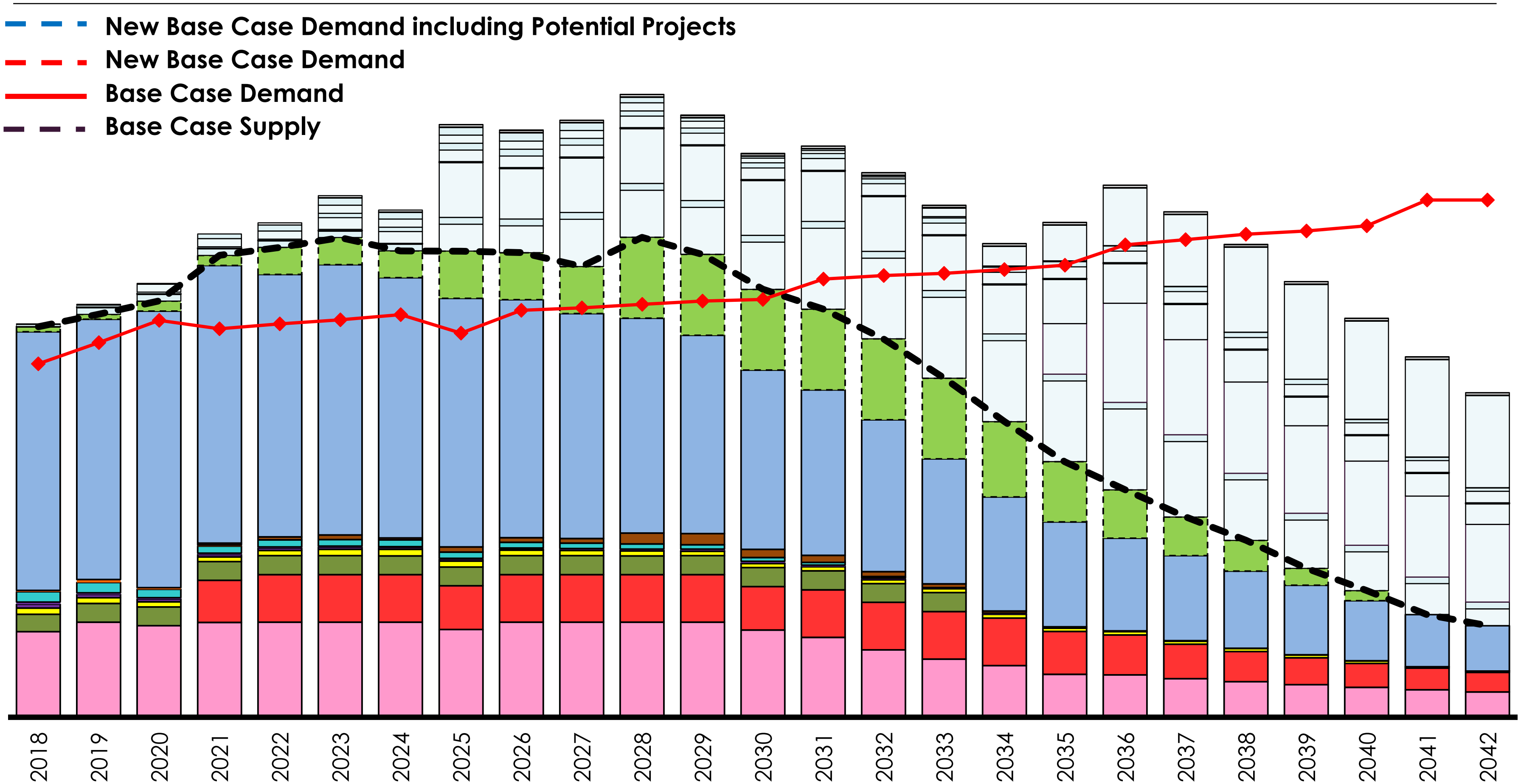
Source: Salalah Free Zones (SFZ), Special Economic Zones Authority of Duqm (SEZAD), Ministry of Oil and Gas

The demand line was refined with ~40 projects' projected gas demand from free zones as well as projected request from 10 industrial estates



Source: Ministry of Oil and Gas, Lab Analysis

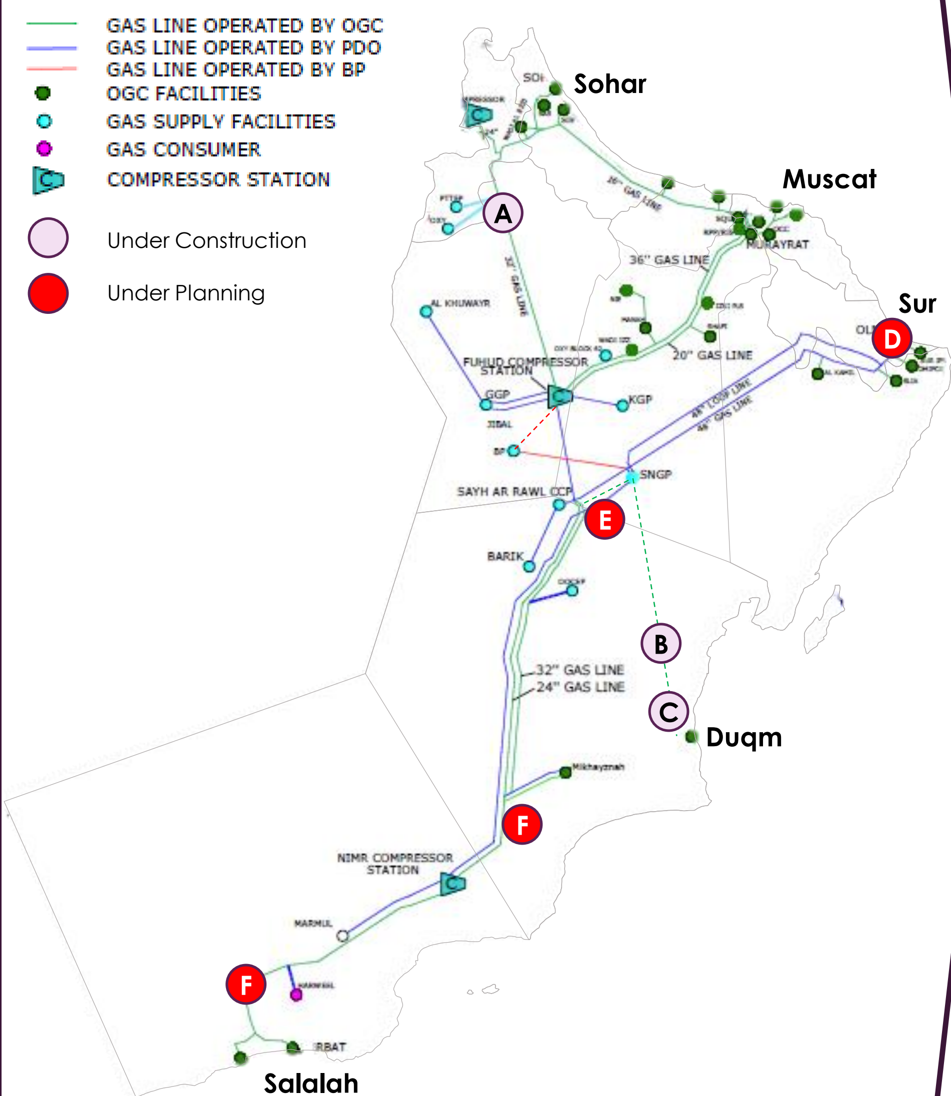
The need and maturity timing of the potential additional supply (white wedges) are dependent on exploration/ appraisal results, successful technology trials, economics screening and the need for gas.



Source: Ministry of Oil and Gas, Lab Analysis

6 gas infrastructure projects under OGC are identified to improve the overall gas line capacity and efficiency

Existing Gas Pipeline Infrastructure



OGC Infrastructure Details – Existing Projects

Sohar — On Stream Date – Mar 2019

A
- Pipeline : **Fahud-Sohar**
- Capacity : 32" – Additional 13 MMsm3/d (Sohar) Additional 6.8 MMsm3/d (Ibri Power Plant)

Duqm — On Stream Date – May 2019

B
- Pipeline : **SNGP - Duqm (Operationalise 2020)**
- Capacity : 36" – 25 MMcm3/d

C
- Infra : **Duqm Gas Supply Station (DGSS)** + DGSS spur line to Duqm Refinery (7km)
- Capacity : 15 mmm3/d +10%

Sur — On Stream Date – TBD

D
- Pipeline : **36" extension pipeline of 48" loop line to Sur (Rich Lean Gas Segregation)** Capacity : TBD

South Line – Salalah — On Stream Date – Feb 2019

E
- Pipeline : **SNGP-24" South Gas line (Rich Lean Gas Segregation)** Capacity : 10mmm3/d + 10%

F
- Pipeline : **South Grid (Loopline)**
- Capacity : 32" – (increase South Gride to 16 MMcm3/d)

Source: Oman Gas Company

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Conclusion

- Energy Efficiency will aid the country supply demand picture
- Renewable are essential in the country to free up the gas for industrial use