

Polish transport initiatives with regard to LNG



Republic
of Poland



MINISTRY OF ENERGY

Forecast of the structure of final energy demand by sectors (Mtoe)

	2010	2015	2020	2025	2030	2035	2040	2045	2050
agriculture sector	3,8	3,2	2,8	2,4	2,3	2,1	2,0	1,9	1,7
industry and construction	15,4	15,2	16,8	17,8	18,9	20,0	20,9	21,0	20,2
transport	17,6	18,9	20,9	21,4	21,0	19,5	17,9	16,6	16,0
services	8,5	8,6	8,7	8,2	8,1	7,9	7,5	7,5	7,2
households	21,1	21,4	22,4	22,5	22,0	21,0	19,9	18,7	17,6
total	66,5	67,2	71,6	72,3	72,3	70,4	68,2	65,7	62,7

Terminal LNG
(obecnie: 5 mld m³
rozbudowa: +2,5 mld m³)

Polska - Norwegia
(do 10 mld m³)

Gazociąg Jamał, (rewers, tech.)
do 5,4 mld m³)

Włocławek

Lwówek

Lasów
(1,5 mld m³)

Polska - Czechy
(6,5/5 mld m³, 2019)

Gaz-Moravia
Interkonektor południowy
(0,5 mld m³)

Polska - Słowacja
(5,7/4,7 mld m³, 2019 r.)

Polska – Litwa
(1,7/2,4 mld m³, 2021)

Tietierowka
(0,2 mld m³)

Gazociąg Jamał
(30,7 mld m³)

Wysokoje
(5,5 mld m³)

Hrubieszów
(0,3 mld m³)

Polska – Ukraina (Hermanowice)
(5 mld m³, 2020, obecnie eksport ok. 1,5 mld m³)

Drozdowice
(4,4 mld m³)

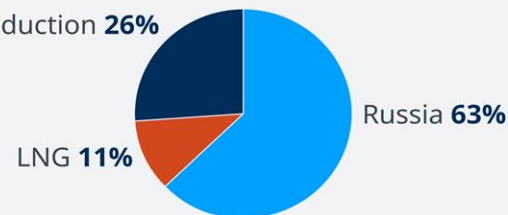
Polłączenia istniejące

Polłączenia planowane lub w trakcie budowy

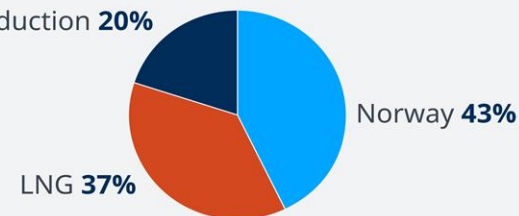
Źródło: OGP Gaz-System S.A.

Before and after, 2017-2022

Own production **26%**



Own production **20%**



Source: Bloomberg

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LNG TERMINAL EXPANSION PROGRAM

TENDER PROCEDURE FOR THREE ELEMENTS:

LNG TANK Project:

- ▶ Improving the LNG Terminal operational flexibility
- ▶ Providing optimum process storage capacity for transshipment and increased regasification purposes

3rd LNG tank

LNG-to-rail loading

LNG-to-RAIL Project:

- ▶ Extending the scope of services with ISO tank containers and rail tankers
- ▶ Implementation of the virtual pipe

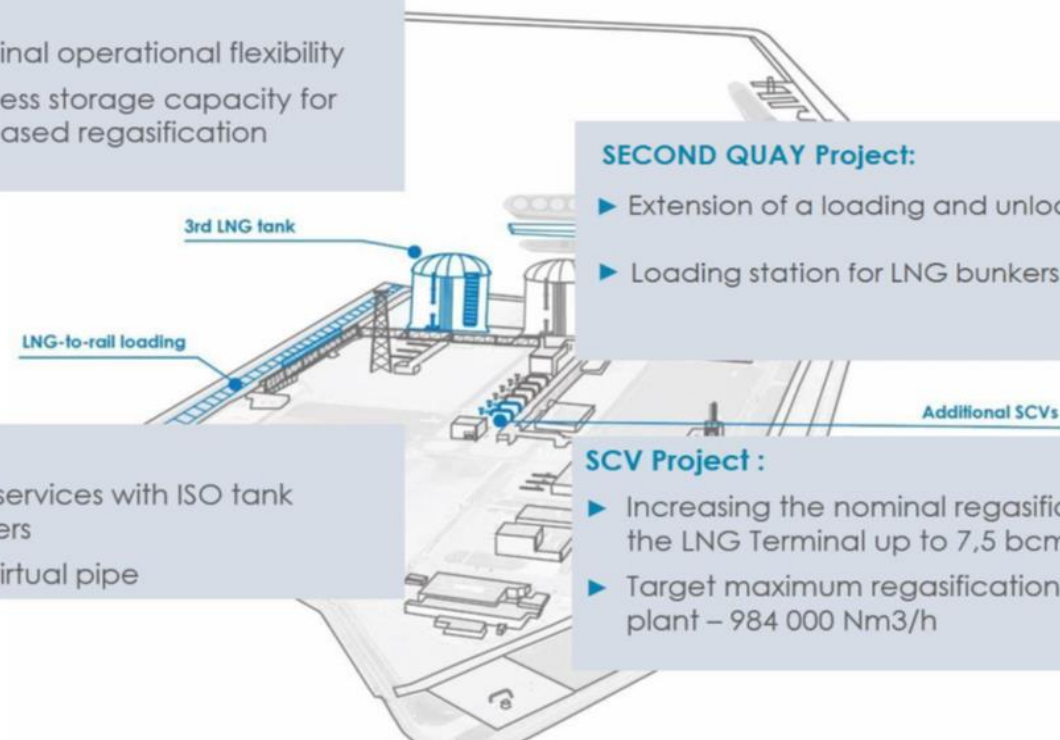
SECOND QUAY Project:

- ▶ Extension of a loading and unloading station
- ▶ Loading station for LNG bunkers

Additional SCVs

SCV Project :

- ▶ Increasing the nominal regasification capacity of the LNG Terminal up to 7,5 bcma
- ▶ Target maximum regasification capacity of the plant – 984 000 Nm³/h



Polish Acts related to LNG

National Policy Framework for the Development of Infrastructure for Alternative Fuels

- 14 LNG stations along to the TEN-T core network by 2025
- 3 thousands LNG-powered vehicles
- Availability of LNG bunkering services in the ports of: Gdańsk, Gdynia, Szczecin, Świnoujście

Act on Electromobility and Alternative Fuels

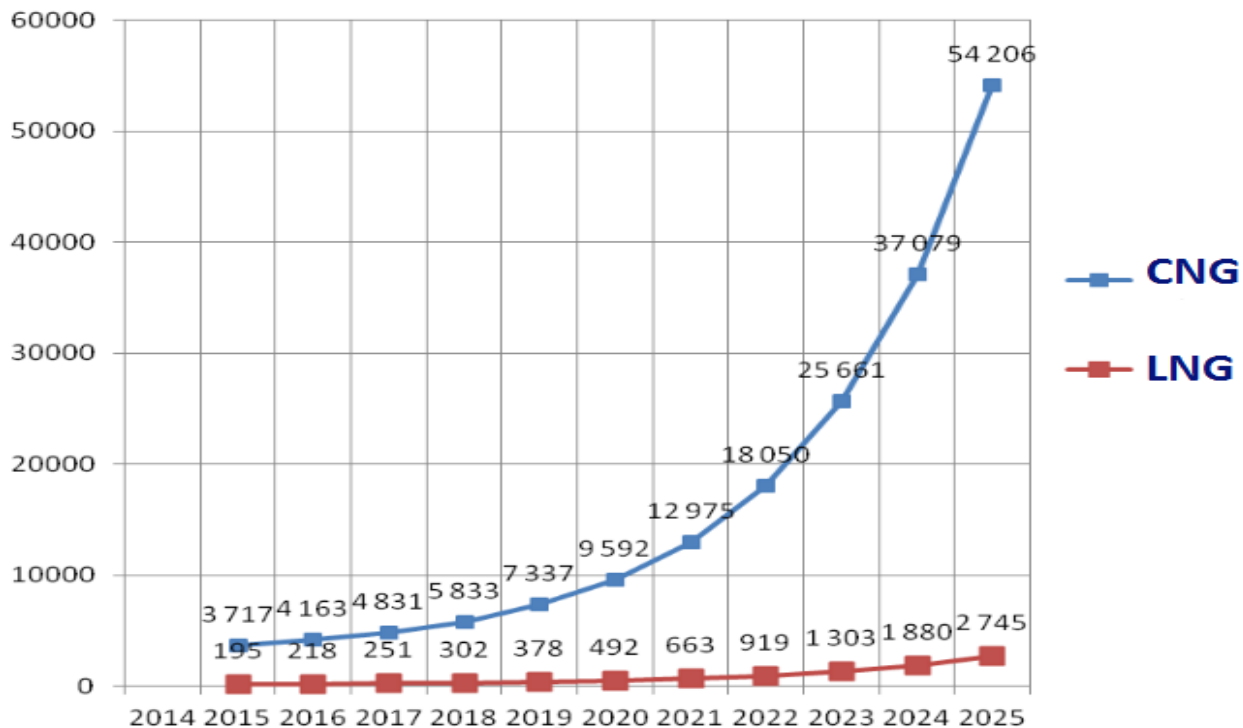
- Clean transport areas
- Obligation to perform public duties using at least 30% of electric and natural gas vehicles
- Plan for the location of LNG bunkering points

Energy Policy of Poland until 2040

- Increasing use of LNG and CNG as alternative fuels in transport



Forecast number of natural gas vehicles



LNG financial support

- **Low-Emission Transport Fund**
- **National Fund for Environmental Protection and Water Management**
- **Operational Programme Infrastructure and Environment**

Act on Excise Duty – exemption of LNG from excise duty

THANK YOU!

