

Gas Utilities Global Industry Almanac 2013-2022

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Abstracts

Gas Utilities Global Industry Almanac 2013-2022

SUMMARY

Global Gas Utilities industry profile provides top-line qualitative and quantitative summary information including: market share, industry size (value and volume 2013-17, and forecast to 2022). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the industry.

KEY QUESTIONS ANSWERED:

What was the size of the global gas utilities industry by value in 2017?

What will be the size of the global gas utilities industry in 2022?

What factors are affecting the strength of competition in the global gas utilities industry?

How has the industry performed over the last five years?

Who are the top competitors in the global gas utilities industry?

SCOPE

Essential resource for top-line data and analysis covering the global gas utilities industry. Includes industry size and segmentation data, textual and graphical analysis of industry growth trends and leading companies.

The gas utilities market covers all natural gas consumption, net of distribution or transmission losses, by end-users in the following categories: industrial (including use as a feedstock and autogeneration), commercial and public-sector organizations, residential consumers, electric power generation (including combined heat and power but excluding autogeneration and heat plant), and other (including transport, agriculture, centralized heat plant, and other usage). Values are calculated from segment volumes and the average annual price of gas charged to end-users in each segment net of any applicable taxes.

In some countries, synthetic gas (also called syngas, coal gas, city gas, etc) or biogas (generated from waste materials) may be used in a similar manner to natural gas, and has therefore been included in the market volume. To take into account the different energy content of such gases, all calculations were carried out in energy units, and then converted to bcf using the conversion factor for natural gas.

Market shares were calculated as the total volume of gas sold to external end-users in all segments, divided by the total market volume. To avoid the risk of double-counting, gas volumes that were distributed to end-users on behalf of another retailer under third-party network access agreements are not included. Wholesale, trading, and storage volumes are excluded (except for Russia where both wholesale and retail volumes are included). For companies which operate in both gas and power sectors, any self-supply to their own gas-fired generation plant is excluded.

All currency conversions are at constant average annual 2017 exchange rates.

The global gas utilities industry had total revenues of \$1,230.4bn in 2017, representing a compound annual rate of change (CARC) of -2.4% between 2013 and 2017.

The power generation segment was the industry's most lucrative in 2017, with total revenues of \$365.8bn, equivalent to 29.7% of the industry's overall value.

The performance of the industry is heavily influenced by changes in gas prices. For example, prices in the majority of Europe (the biggest market globally) have declined since 2014, which is reflected in the performance of the industry in those years.

REASONS TO BUY

Save time carrying out entry-level research by identifying the size, growth, major segments, and leading players in the global gas utilities industry

Use the Five Forces analysis to determine the competitive intensity and therefore attractiveness of the global gas utilities industry

Leading company profiles reveal details of key gas utilities industry players' global operations and financial performance

Add weight to presentations and pitches by understanding the future growth prospects of the global gas utilities industry with five year forecasts by both value and volume

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