

# Gas Utilities Global Industry Almanac 2017

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## Abstracts

Gas Utilities Global Industry Almanac 2017

### SUMMARY

Global Gas Utilities industry profile provides top-line qualitative and quantitative summary information including: market share, market size (value and volume 2012-16, and forecast to 2021). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the market.

### KEY QUESTIONS ANSWERED

What was the size of the global gas utilities market by value in 2016?

What will be the size of the global gas utilities market in 2021?

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

How has the market performed over the last five years?

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

### SCOPE

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

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

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

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

## **REASONS TO BUY**

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 2016 exchange rates.

The global gas utilities industry had total revenues of \$249,928.2m in 2016,

representing a compound annual rate of change (CARC) of -2.2% between 2012 and 2016.

Industry consumption volume increased with a compound annual growth rate (CAGR) of 0.6% between 2012 and 2016, to reach a total of 101.5 trillion cubic feet in 2016.

The surge in 2017 is being driven by increased consumption as gas is seen as the least damaging fossil fuel from an environmental point of view. This is being augmented by increasing prices with the hub price hovering around \$3 per million Btu in the first seven months of the year.

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