



Petroleum & Natural Gas Platform Association

Turkiye EP Sector Outlook

www.petform.org.tr

Murat KALAY
PETFORM Secretary General





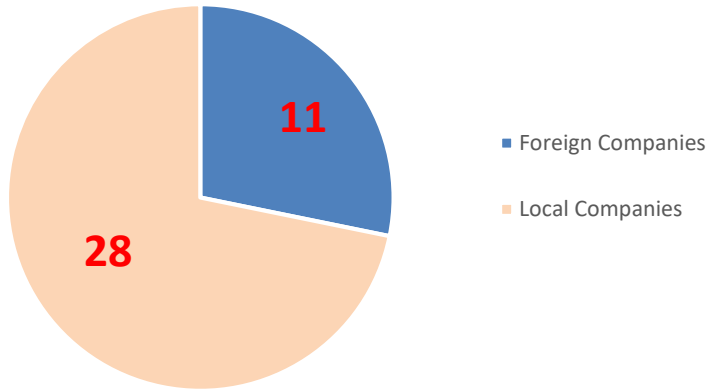
About **PETFORM**

Established in 2000, PETFORM has played a crucial role in the transfer of private sector views to the public authorities regarding to Turkish energy legislation amendments. Member companies mainly have activities in 2 sectors:

- Exploration & Production Sector
- Natural Gas Market

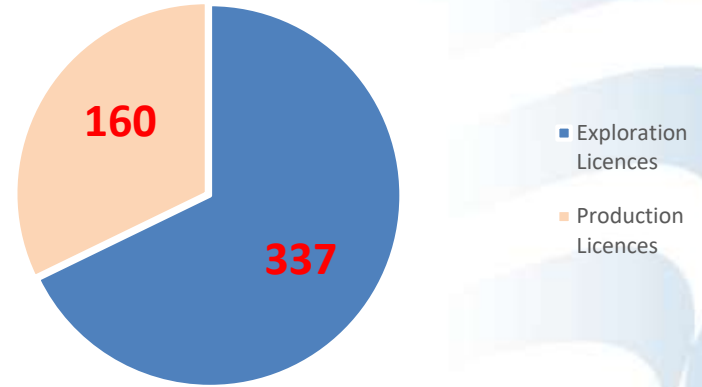
2021 Turkiye-Company & Licence Status

Local/Foreign Company



Total Companies: 39

Licence Status

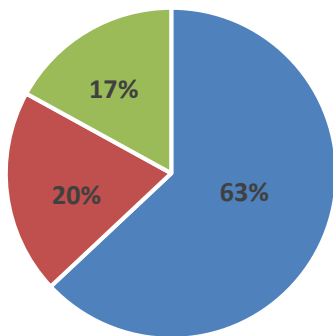


Total Licences: 497

Source: MENR&GDMPA

2021 Turkiye-Production Licence Area

Production Licence Area Status

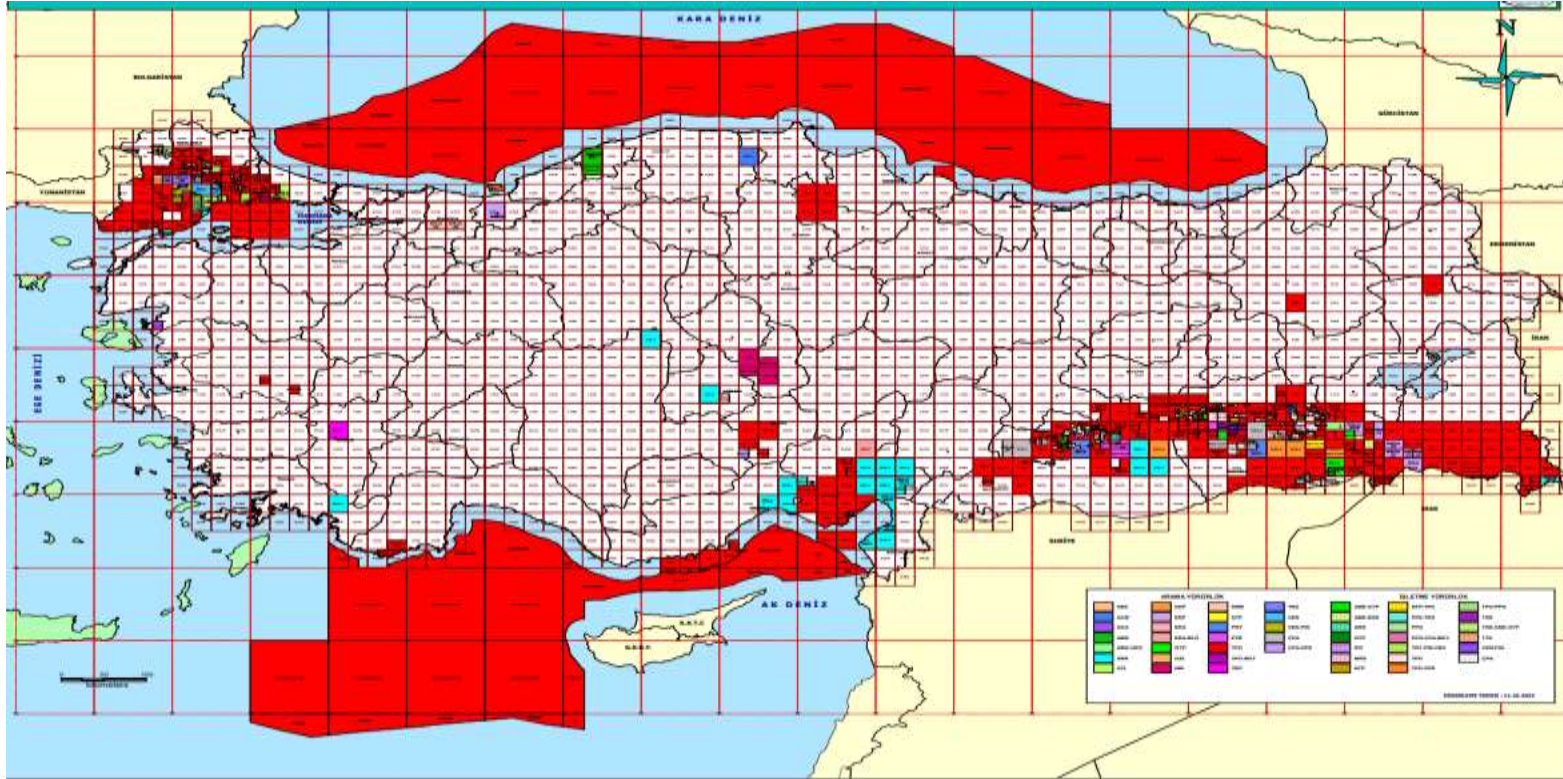


■ Local ■ Foreign ■ Local+Foreign

Company	Production Licence Area km ²
Local	5.841
Foreign	940
Local+Foreign	1.120
Total	7.901

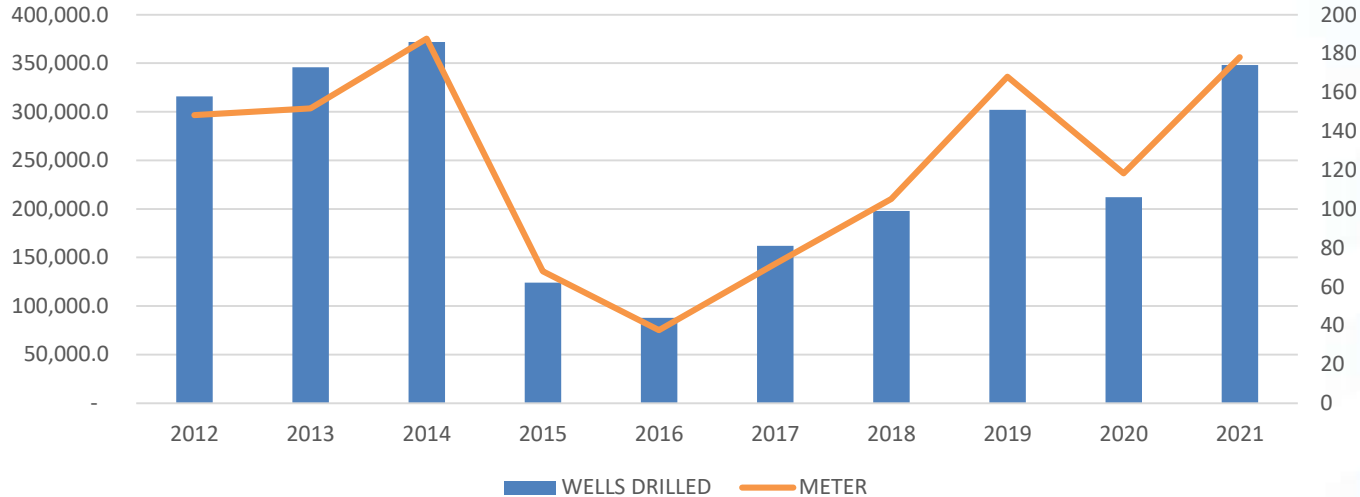
Source: MENR&GDMPA

2022 Türkiye-Licence Map



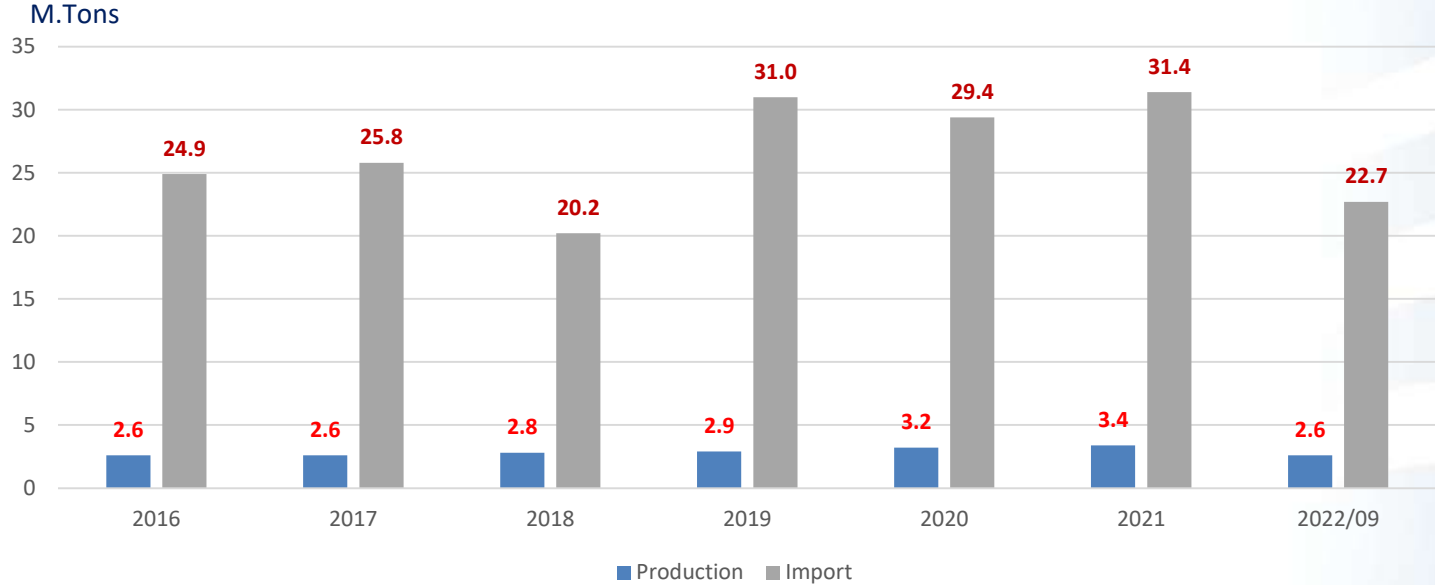
2011-2021 Türkiye - Number and Meters of Wells Drilled

Türkiye - Wells Drilled



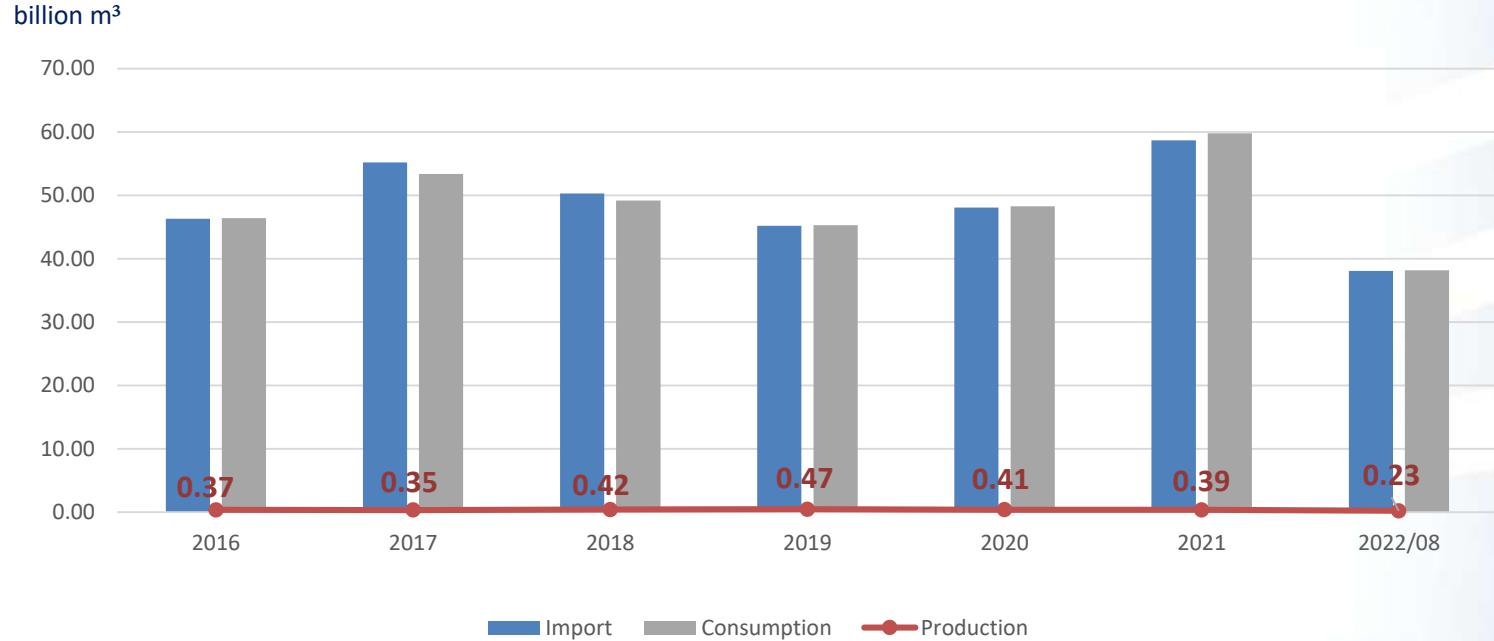
Total wells drilled during 2022 (Jan-Oct): 155

2016-2022/09 Türkiye-Crude Oil Importation/ Production



Source: MENR&GDMPA&EMRA

2016-2022/08 Türkiye-Natural Gas Importation/Consumption/ Production



2022 Türkiye-Pipeline Map



Turkiye-Drilling Ships



Fatih



Kanuni



Yavuz



Abdulhamit Han

Turkiye-Black Sea Discovery

➤ August 2020

Tuna-1 ultra-deep water exploration well; 320 bcm natural gas reserve announced

➤ October 2020

*TPAO has made a second discovery in the lower section of Tuna-1 well adding another 85 bcm

*Tuna-1 Discovery is now updated as 405 bcm (now called Sakarya Gas Field); ranked as one of the largest natural gas discovery in 2021

➤ June 2021

*A new discovery of 135 bcm gas in the North Sakarya Gas Field in Amasra-1 well

*With the addition of the 135 bcm to the previously discovered volume of 405 bcm in the Sakarya Gas Field, the total gas reserves discovered in the Black Sea reached 540 bcm

➤ June 2021

*Starting construction of Filyos Natural Gas Processing Plant. Total processing capacity will be around 50 million cubic meters per day

➤ October 2021

*Sakarya Gas Field Phase-1 integrated Engineering, Procurement, Construction and Installation Contract is awarded to the consortium of Subsea7 and Schlumberger with their subcontractors, while Wood will be the management partner of the project.

➤ June 2022

*Laying underwater pipes for the Black Sea gas project. A total of 170-kilometer-long pipes will be laid at a water depth of 2,200 meters in the Black Sea for the project.

➤ November 2022

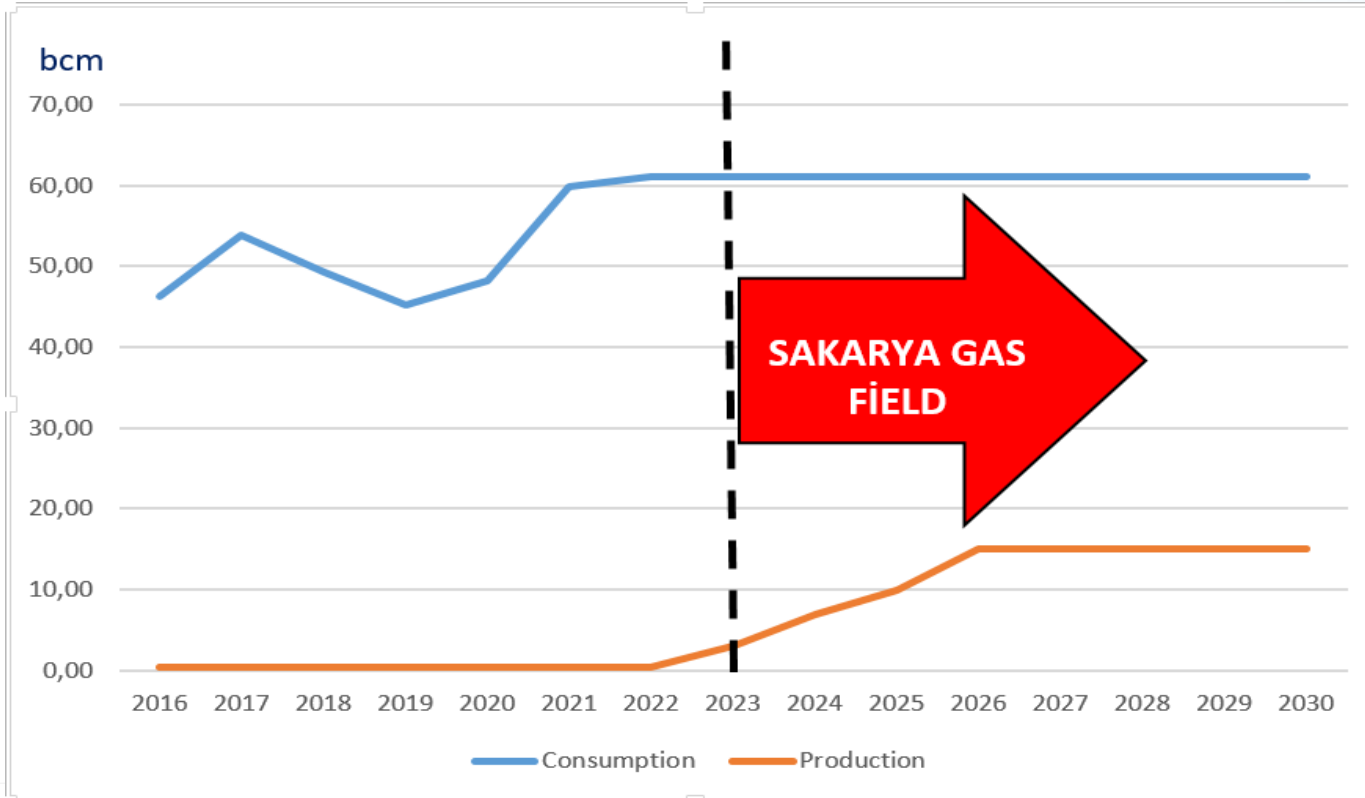
* Laying underwater pipes for the Black Sea is %97 complete.

TARGET

By end of Q1 2023 Black Sea natural gas production will be connected to national grid and consumption.

At the first phase 10 million cubic meters of natural gas per day will be reached and increase to 40 million cubic meters per day in the second stage around 2026. At plato production level (2026-2027) expecting to cover around %25-%30 of national consumption.

Turkiye-Black Sea Discovery Impact



Teşekkürler...
Thank You...



Contact Us

ADDRESS: Kızılırmak Mah. 1450.Sok. No:1 Ankara Ticaret Merkezi B Blok
K:1 D:5 Çukurambar Çankaya / Ankara

TEL: +90 (312) 428 24 71

E-MAIL: petform@petform.org.tr