



Turkey EP Sector Outlook

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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

2011-2020 Turkey- Natural Gas Importation and Production

(billion m³/year)
(milyar m³/yıl)

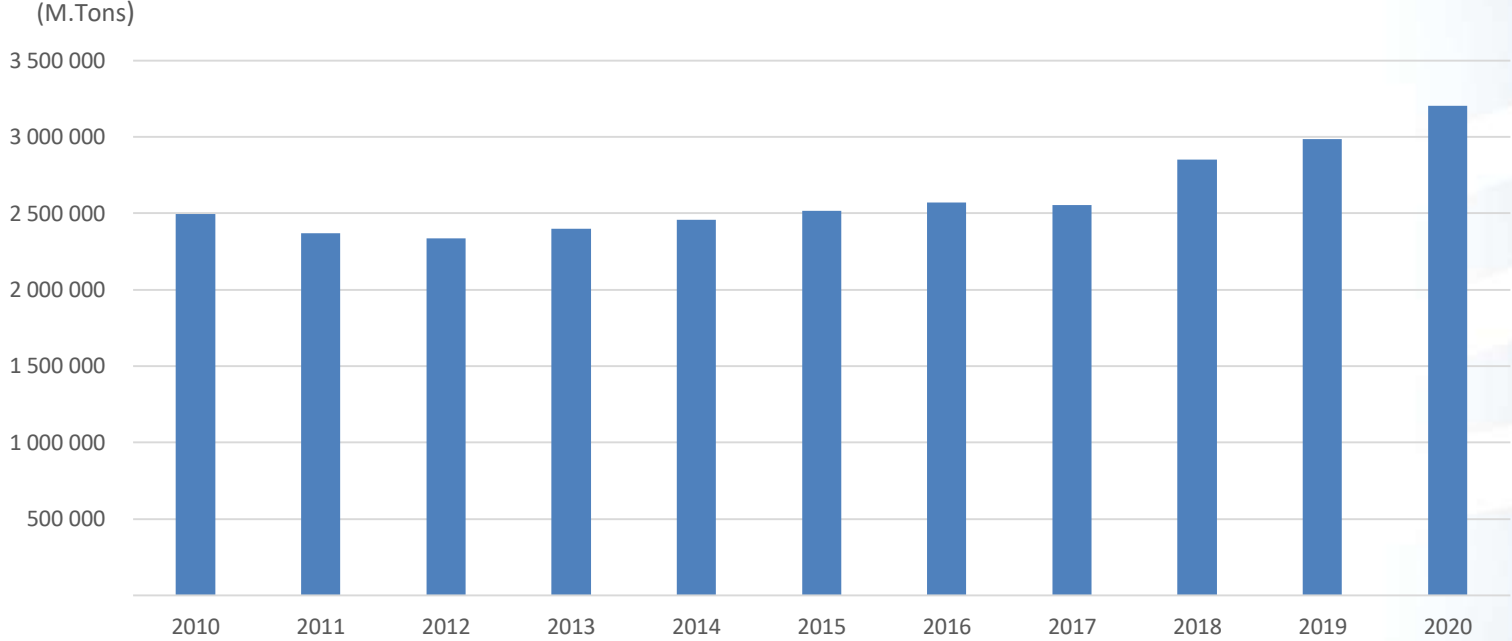


■ Yerli Doğal Gaz Üretimi
Local Natural Gas Production

■ Doğal Gaz Net İthalatı
Net Natural Gas Importation

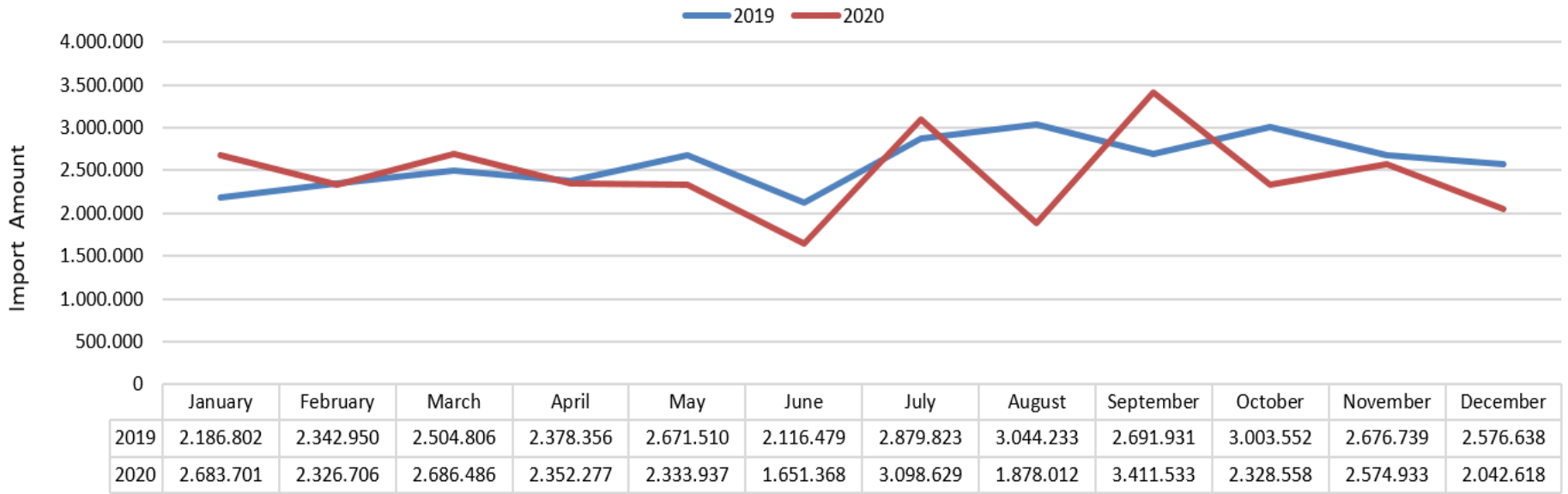
● Yerli Üretim Oranı
Local Production Ratio

2010-2020 Turkey-Crude Oil Production



Source: MENR-GDMPA

Turkey-Crude Oil Importation (2019-2020)



Comparison of Crude Oil Import in 2019 and 2020 (tonnes)

[Source: EMRA](#)

Total importation (2019): 31,1 M tonnes

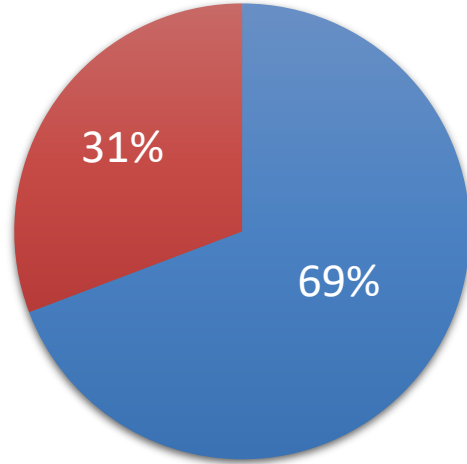
Total importation (2020): 29,3 M tonnes

Types of the Wells

| YILLAR YEARS | KUYU ÇİNSLERİ - WELL TYPES | | | | | | | | | | TOPLAM TOTAL | |
|-----------------|----------------------------|------------------|---------------------|------------------|----------------------|------------------|-------------------------|------------------|-----------------------------|------------------|-----------------|------------------|
| | ARAMA EXPLORATION | | TESPİT EXTENSION | | ÜRETİM PRODUCTION | | ENJEKSİYON INJECTION | | JEO.İSTİKŞAF GEO.INVEST. | | ADET NO. | METRAJ METRES |
| | ADET NO. | METRAJ METRES | ADET NO. | METRAJ METRES | ADET NO. | METRAJ METRES | ADET NO. | METRAJ METRES | ADET NO. | METRAJ METRES | | |
| 2010 | 93 | 150.981,6 | 52 | 78.258,0 | 62 | 93.815,4 | | | | | 207 | 323.055,0 |
| 2011 | 81 | 143.675,0 | 27 | 41.176,5 | 61 | 110.306,0 | 2 | 2.792,0 | | | 171 | 297.949,5 |
| 2012 | 83 | 159.451,0 | 23 | 42.083,0 | 52 | 95.042,0 | | | 1 | 2.940,0 | 159 | 299.516,0 |
| 2013 | 67 | 122.681,0 | 32 | 63.465,0 | 74 | 117.499,0 | | 473,0 | | 916,0 | 173 | 305.034,0 |
| 2014 | 48 | 103.531,0 | 39 | 85.669,0 | 99 | 186.114,0 | 2 | 3.832,0 | | | 188 | 379.146,0 |
| 2015 | 31 | 68.247,0 | 8 | 25.449,0 | 23 | 42.083,0 | | | | | 62 | 135.779,0 |
| 2016 | 13 | 20.272,0 | 9 | 16.054,5 | 22 | 38.972,0 | | | | | 44 | 75.298,5 |
| 2017 | 21 | 37.795,0 | 20 | 38.444,0 | 40 | 67.043,0 | | | | | 81 | 143.282,0 |
| 2018 | 30 | 80.756,0 | 18 | 38.161,0 | 51 | 91.423,0 | | | | | 99 | 210.340,0 |
| 2019 | 56 | 148.324,0 | 22 | 55.216,0 | 73 | 132.677,0 | | 1.839,0 | 2 | 2.807,0 | 153 | 340.863,0 |
| 2020 | 40 | 86.869,0 | 19 | 43.262,0 | 48 | 106.346,0 | | | | | 107 | 236.477,0 |

Source: MENR-GDMPA

Licence Status



■ Local Company ■ Foreign Company

Exploration Licences: 331

Production Licences: 160

Total EP Companies: 39 (12 Foreign / 27 Local)

Source: GDMPA

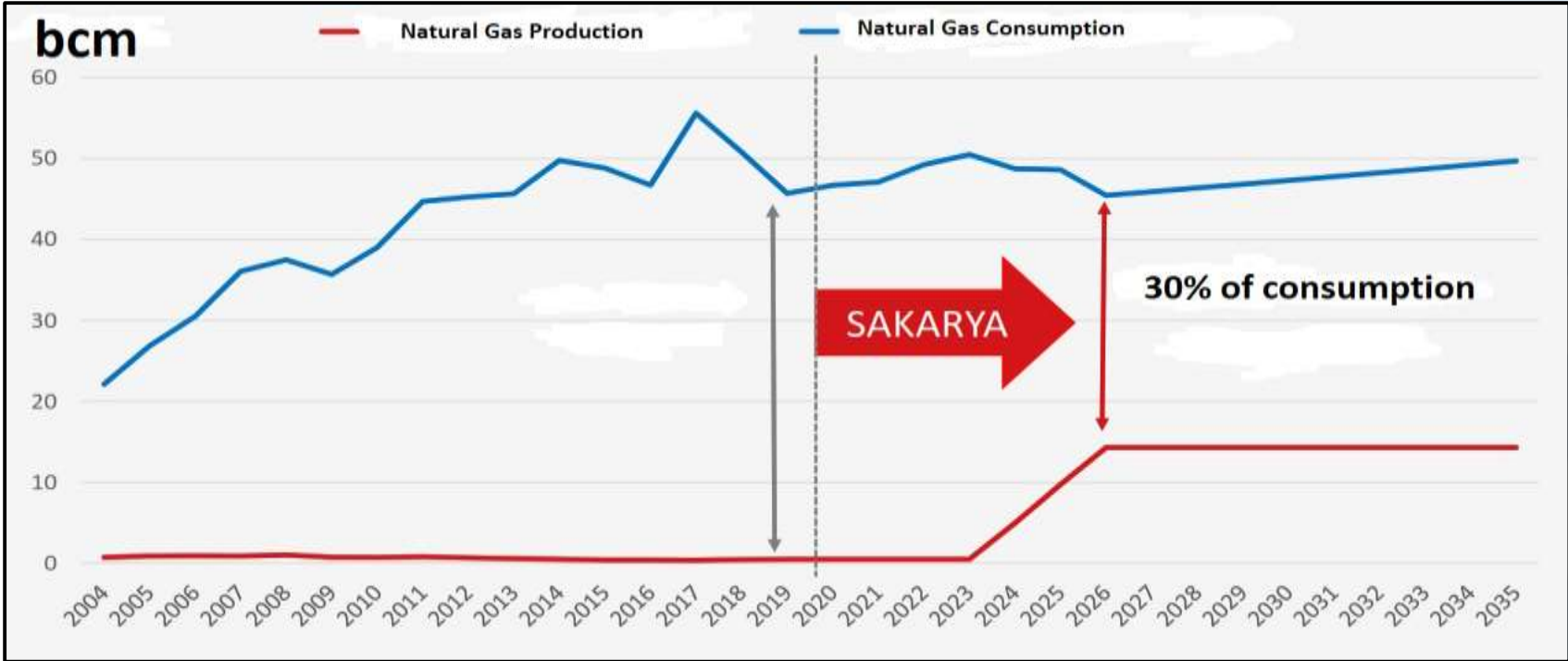
Offshore Activities – Black Sea Natural Gas Discovery



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- TPAO has made a second discovery in the lower section of Tuna-1 well adding another 85 BCM and totaling 405 BCM gas , ranks as one of the largest natural gas discovery in 2020 in the world.
- This exploration success will provide a major boost to Turkey's economic growth by supplying natural gas for decades.

Black Sea Natural Gas Discovery



Source: MENR-TPAO-EMRA

Teşekkürler...



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