



# Investment Opportunities in Turkey E&P Sector

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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

# Member Companies



- AKENERJ
- AKMERCAN ENERJ
- AKFEL
- AKSA
- ALPIQ
- ALADDIN MIDDLE EAST
- ANGORAGAZ
- ATLI ENERJI
- AVRASYA GAZ
- AYGAZ DG
- BATI HATTI GAZ
- BORDRILL
- BOSPHORUSGAZ
- BP
- CENG Z ENERJ
- CHEVRON
- ÇALIK ENERJ
- DANSKE COMMODITIES
- DO AL ENERJ
- EGEGAZ
- ENERCO ENERJ
- ENERJ SA
- ENERYA
- ENGIE
- ETKI LIMAN
- ERDGAZ
- EWE ENERJ
- EXXONMOBIL
- GENEL ENERGY
- GLOBAL MADEN
- GUNVOR
- GÜNEY YILDIZI PETROL
- HATTU A ENERJ
- IBS RESEARCH
- K BAR ENERJ
- MARSA ENERGY
- MET ENERJ
- NATURGAZ
- NATURELGAZ
- OMV
- PALMET ENERJ
- PERENCO
- RWE
- SHELL ENERJ
- SHELL UPSTREAM
- SISECAM ENERJI
- SOCAR
- TBS PETROL
- TEKFEN
- THRACE BASIN
- TOTAL
- TRANSATLANTIC PETROLEUM
- TURCAS
- VALEURA ENERGY
- VOLT ENERJ
- ZORLU ENERJ

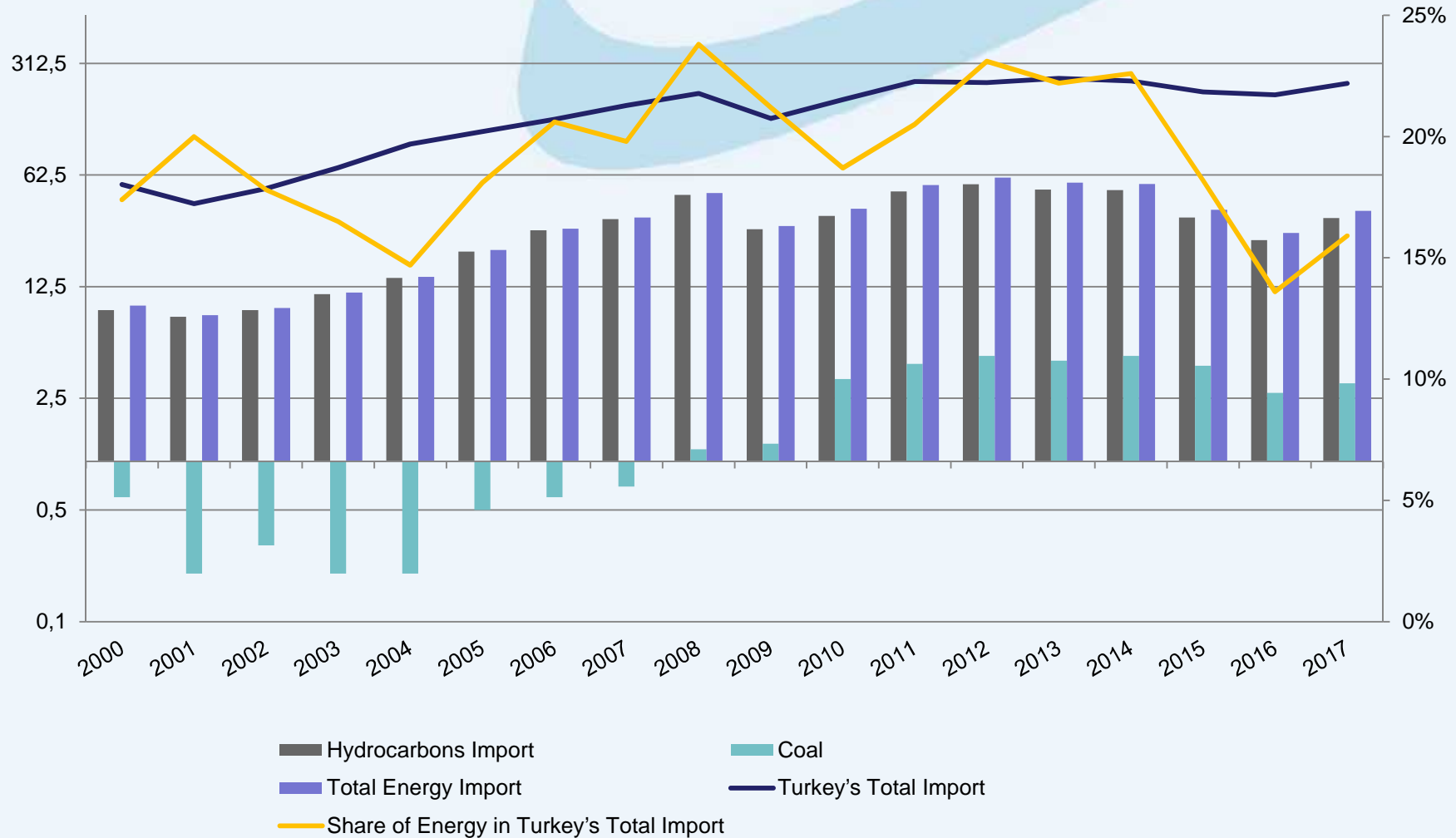
# The Share of Energy in Turkey's Total Imports (2000 – 2017) - I



<i>(milyar USD)</i>	2010	2011	2012	2013	2014	2015	2016	2017
Crude Oil and Petroleum Products	20,6	29,2	31,5	29,4	27,1	17,7	13,1	18,5
Natural Gas	14,1	20,2	23,2	21,2	23,1	16,1	11,3	15,1
Coal	3,3	4,1	4,6	4,3	4,6	4	2,7	3,1
Total Energy Import	38,5	54,1	60,1	55,9	54,8	37,8	27,1	37,2
Turkey's Total Import	185,5	240,8	236,5	251,6	242,1	207,2	198,6	233,8
Share of Energy in Turkey's Total Import	<b>%18,7</b>	<b>%20,5</b>	<b>%23,1</b>	<b>%22,2</b>	<b>%22,6</b>	<b>%18,2</b>	<b>%13,6</b>	<b>%15,9</b>

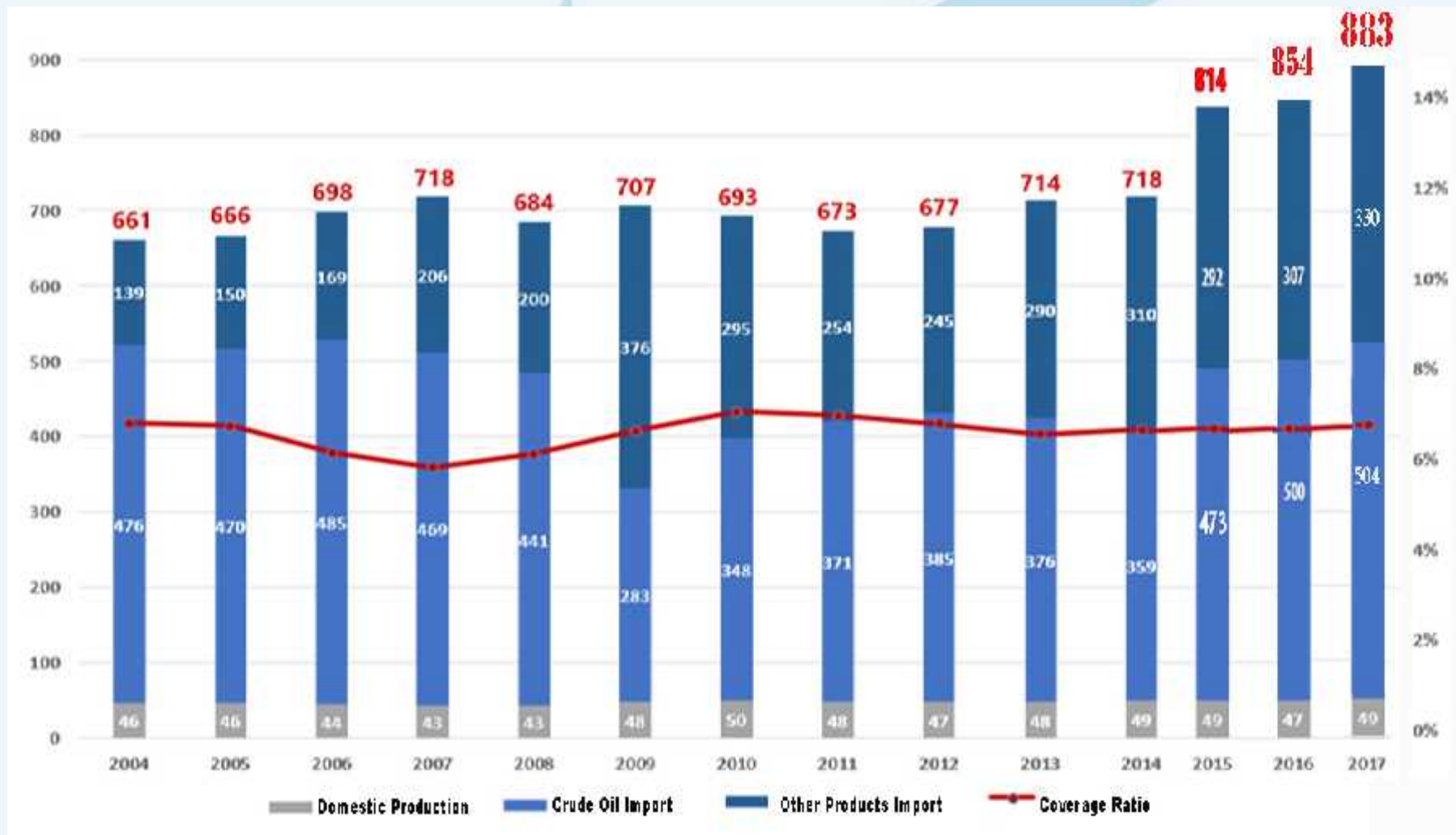
Source: Ministry of Economy

# The Share of Energy in Turkey's Total Imports (2000 – 2017) - II



Source: Ministry of Economy

# Consumption vs Domestic Crude Oil Production



Source: EMRA, PETFORM

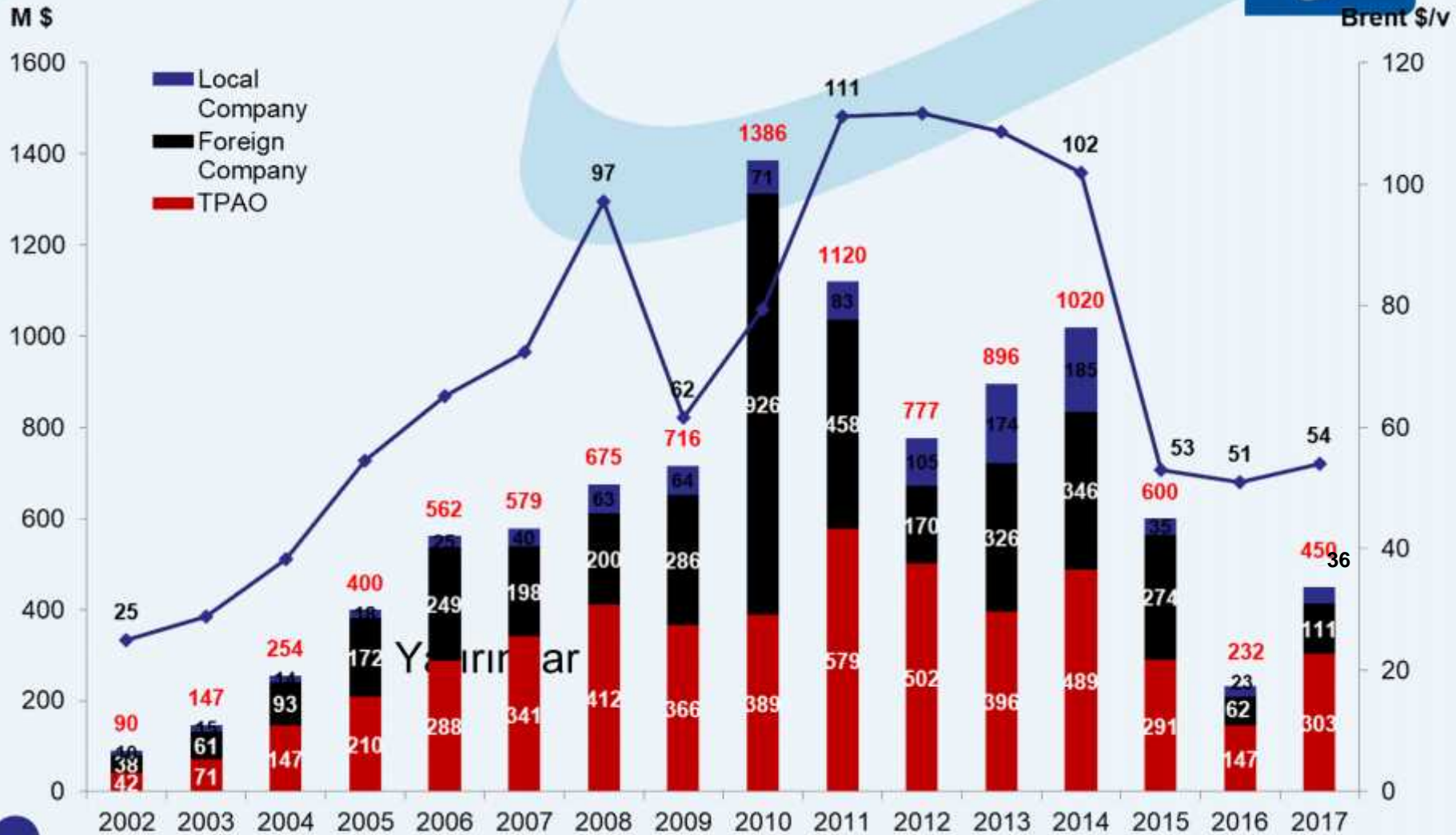
# Consumption vs Domestic Gas Production



Source: EMRA, PETFORM

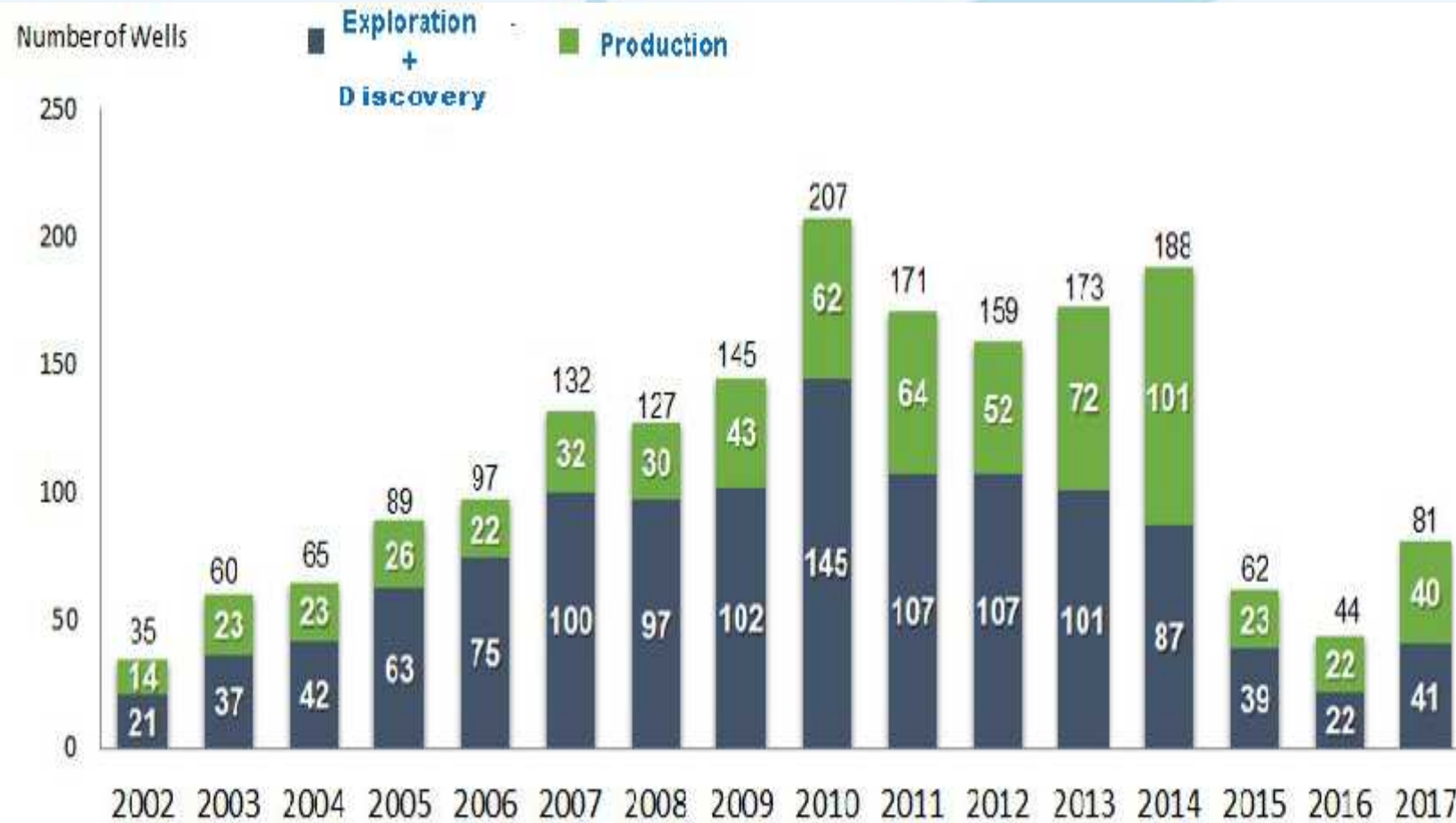


# E&P Investments

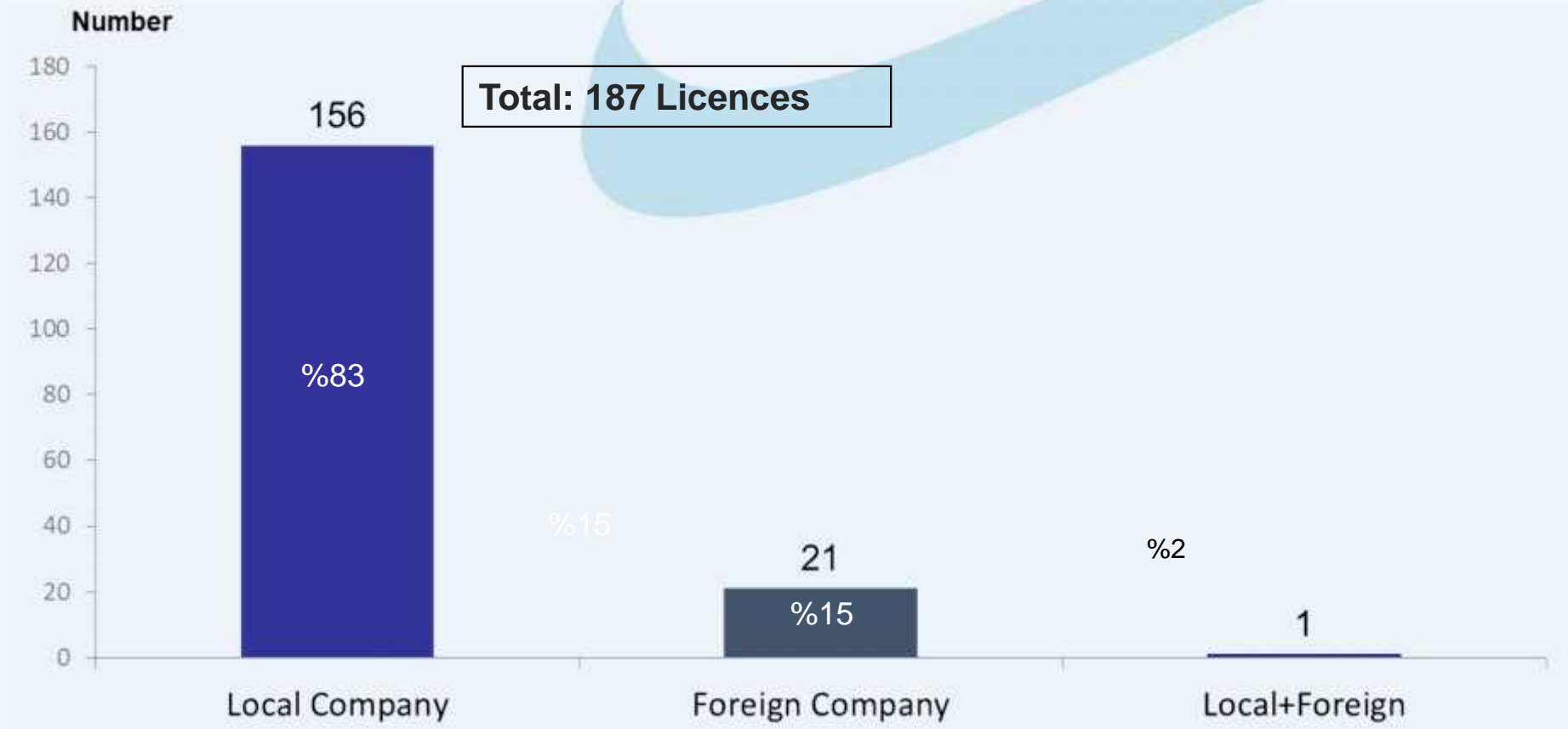




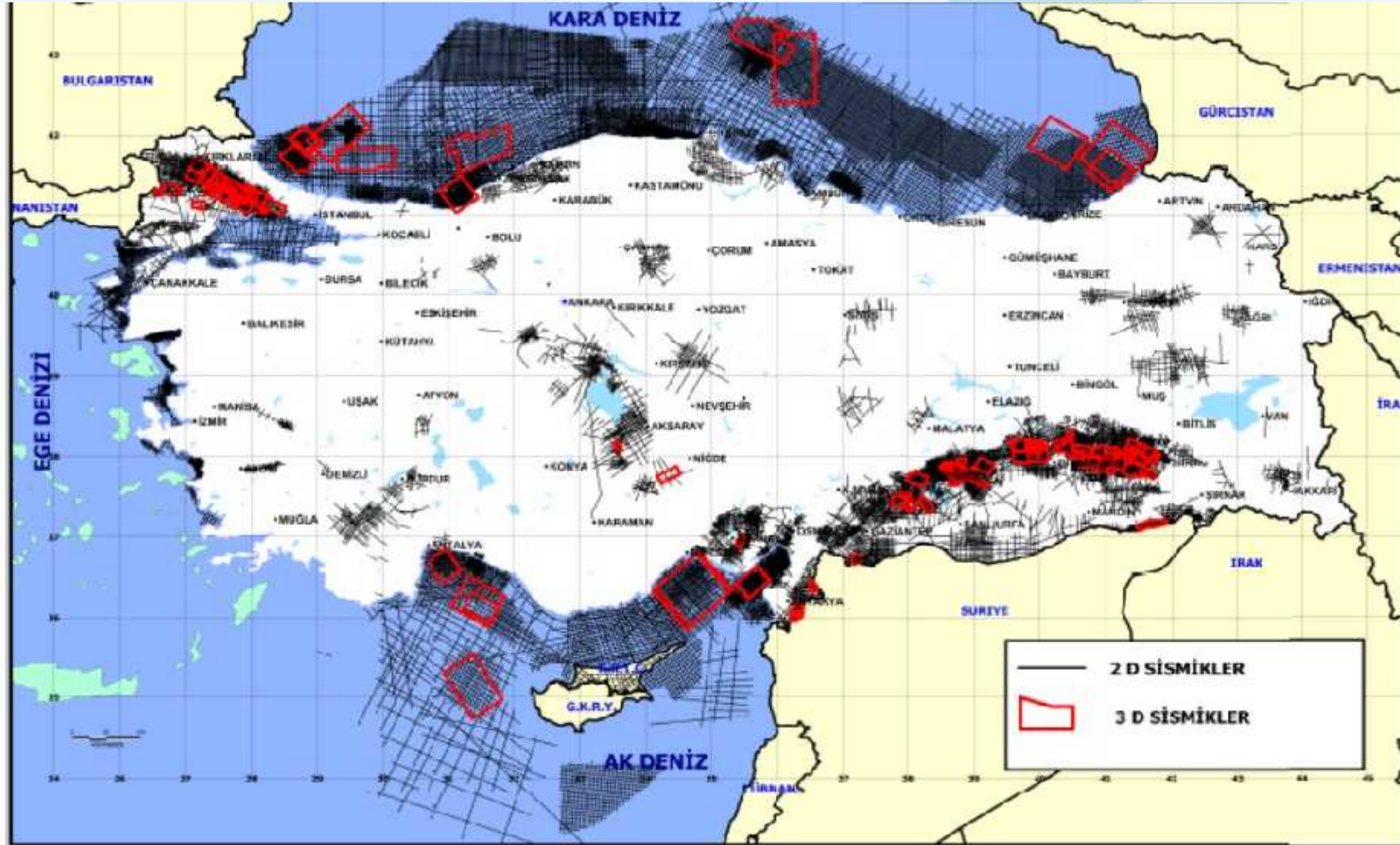
# Number of Drilled Wells



# Licences

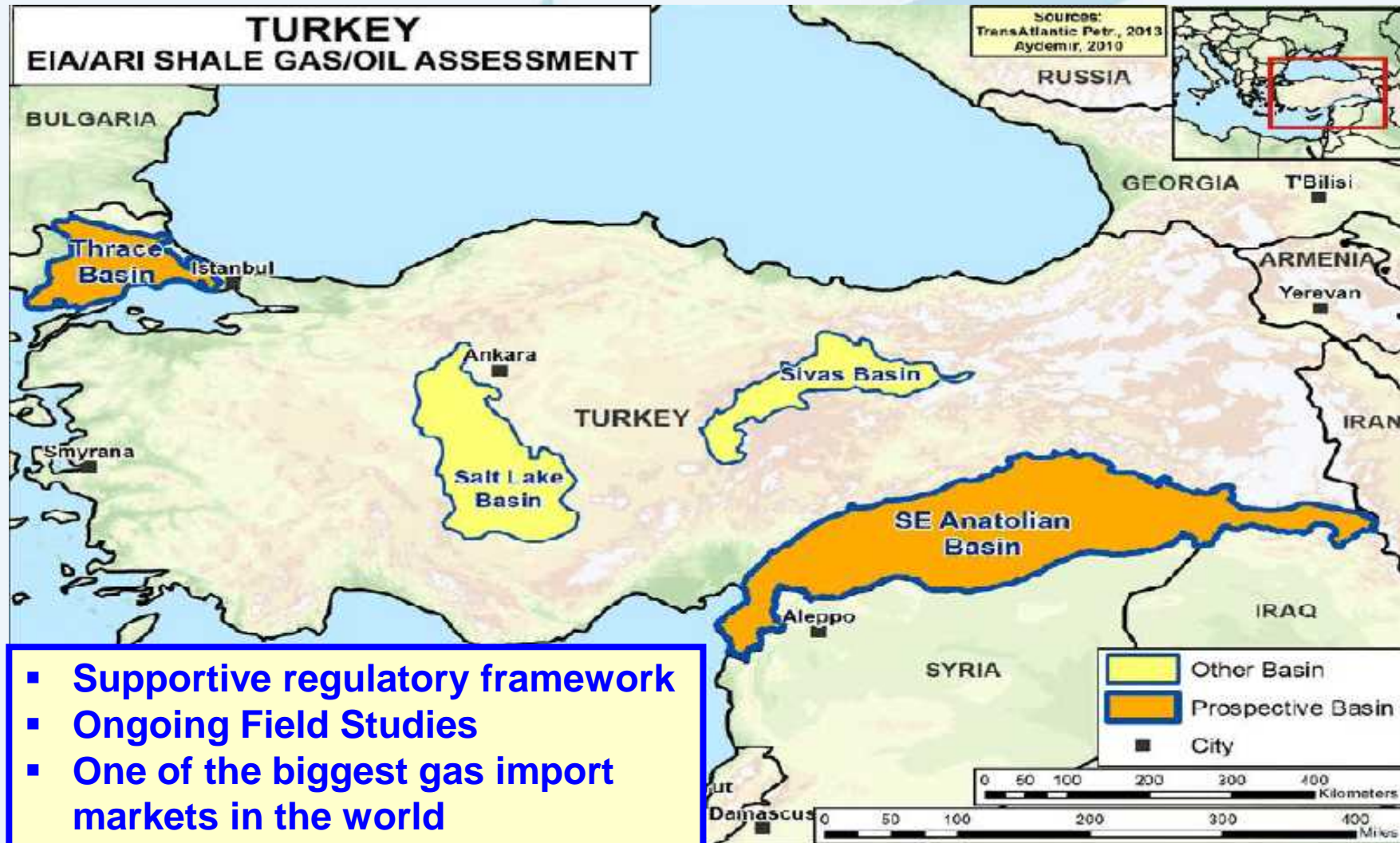


# Seismic Map & Blocks





# Shale Gas / Oil in Turkey Potential Basins



- Supportive regulatory framework
- Ongoing Field Studies
- One of the biggest gas import markets in the world

Source: US Energy Information Administration



***THANK YOU...***

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