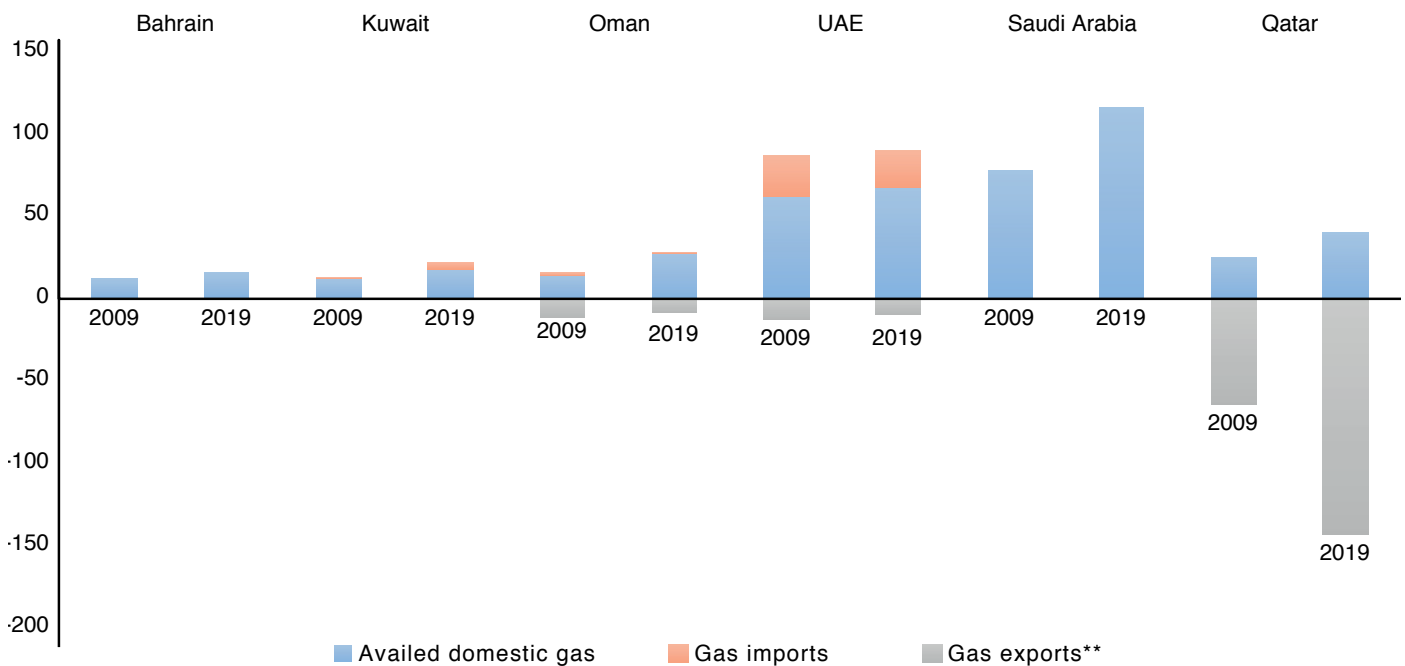


Data Insight

21/09/2020

Natural Gas Utilization in GCC Countries

Availed gas production for domestic consumption, imports, and exports



Sources: [OPEC](#) & [OAPEC](#)

*Gas exports are depicted as negative outflows to show that they are not consumed domestically

* Units are in billion standard cubic meters per annum

- Between 2009 and 2019, marketed gas production by Gulf Cooperation Council (GCC) members has grown at an average rate of 4.8% per annum, from 265 billion standard cubic meters in 2009 to 422 billion standard cubic meters (Bscm) in 2019. This has been driven by increased demand for gas for electricity generation, power desalination, and petrochemical industries.
- Most of the natural gas produced in each GCC country is consumed domestically, except in Qatar. In 2019, Qatar exported nearly 143 Bscm of the natural gas it produced via liquefied natural gas (LNG) carriers to international markets or by pipeline to the United Arab Emirates (UAE) and Oman. The subsea export pipeline between Qatar and the UAE transports 56 million cubic meters per day of refined methane gas, with a designed capacity of 90.6 million cubic meters per day.

- Saudi Arabia is the largest consumer of gas in the GCC and neither exports nor imports natural gas. The Kingdom increased its gas production by roughly 50% in a decade, reaching 117 Bscm in 2019. This is the highest gas production growth rate among GCC members. The Kingdom is moving to displace inefficient, expensive liquids from its energy mix and avail more gas for its growing petrochemicals industry. In February 2020, Saudi Aramco announced that it obtained regulatory approval to develop the Jafurah basin, which is estimated to contain 5.7 trillion cubic meters (tcm) of liquid-rich gas.
 - Historically, Kuwait consumed all the natural gas it produced and relied on liquid fuels to support its electricity and water desalination industries. However, due to its increasing demand for gas to replace oil, Kuwait began importing LNG in 2009; its imports of LNG reached 4.5 Bscm in 2019. Kuwait is currently building an LNG import terminal and a regasification facility to accommodate more LNG.
 - Bahrain does not export natural gas, and most of the gas it produces is consumed locally. The construction of an LNG facility was completed in early 2020, providing LNG receiving and storage facilities with a regasification capacity of up to 22 million cubic meters per day.
 - The concession agreements Oman and the UAE signed with international oil companies entitled the latter to sell a portion of the gas they produced in both countries on the international markets. This helped both countries to price the gas they produced according to international market prices. It also helped them assess the feasibility of developing more gas fields, especially given that both countries have been gradually lifting their domestic gas subsidies.
 - The emirate of Abu Dhabi, where most of the UAE's oil and gas fields are located, is a net exporter of gas. Meanwhile, Dubai and other emirates are dependent on domestic gas supplies and imports. Overall, the UAE is a net importer of gas, importing 22.5 Bscm and exporting 9.4 Bscm in 2019.
 - The UAE has been reducing its gas exports and diverting the gas it produces to its domestic market. Low LNG spot prices may deter the country from developing its costly fields. Earlier this year, the UAE announced the discovery of Jebel Ali, which contains 2.3 tcm of high sulfur gas and is on the border between Dubai and Abu Dhabi. Economies of scale, however, will play a role in developing this field commercially and may help Dubai to reduce its reliance on LNG imports.
 - According to OPEC's 2020 Statistical Bulletin, Oman's proven gas reserves declined from 0.8 tcm in 2002 to 0.5 tcm in 2012. New gas field discoveries and the Khazzan development have bolstered the country's total gas production and arrested the decline of its gas reserves.
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- Gas is increasingly becoming a key part of Oman's energy mix and petrochemicals industry, although 70% of the gas it produces is consumed domestically. The recent commissioning of Oman's Rabab Harweel Integrated Gas Project in 2019 will contribute to the country's growing demand for gas.
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Access this [link](#), for machine-readable data, and other [related datasets](#) from the KAPSARC data portal for further analysis and visualization.

[View this Data Insight online with interactive charts](#)

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