

ETCSEE

ENERGY | CENTRAL & SOUTH
TRADING | EASTERN EUROPE



The Future of CEE Gas Markets

CEE traded Gas Markets –
Consequences of regulations and geopolitics

Gottfried Steiner
CEO of Central European Gas Hub AG



Natural Gas

Gas trading places in Austria and in CEE:

- CEGH-VTP: benchmark hub for CEE region
- EEX CEGH Gas exchange markets in Austria and in the Czech Republic

Biomethane

Support the development of biomethane markets and its role in the future energy mix:

- CEGH GreenGas Platform
- EFET CEGH Standard Contract for Biomethane Certificates

Green Hydrogen

Support the development of hydrogen markets:

- CEGH Green Hydrogen Index
- Build-up of future hydrogen markets

CEGH Volumes 01-05/2024



CEGH VTP Market:

01-05/2024

269.6 TWh

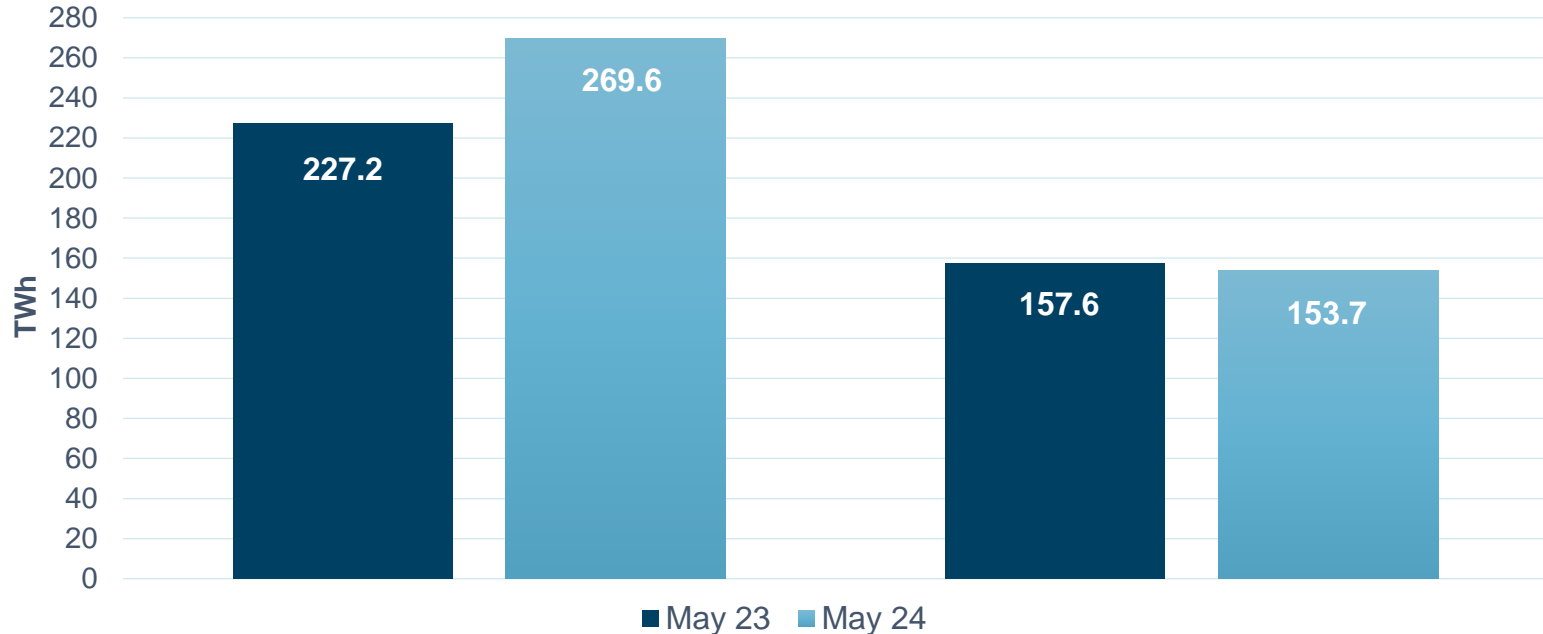
y-t-y: +18.6%

EEX CEGH Market AT:

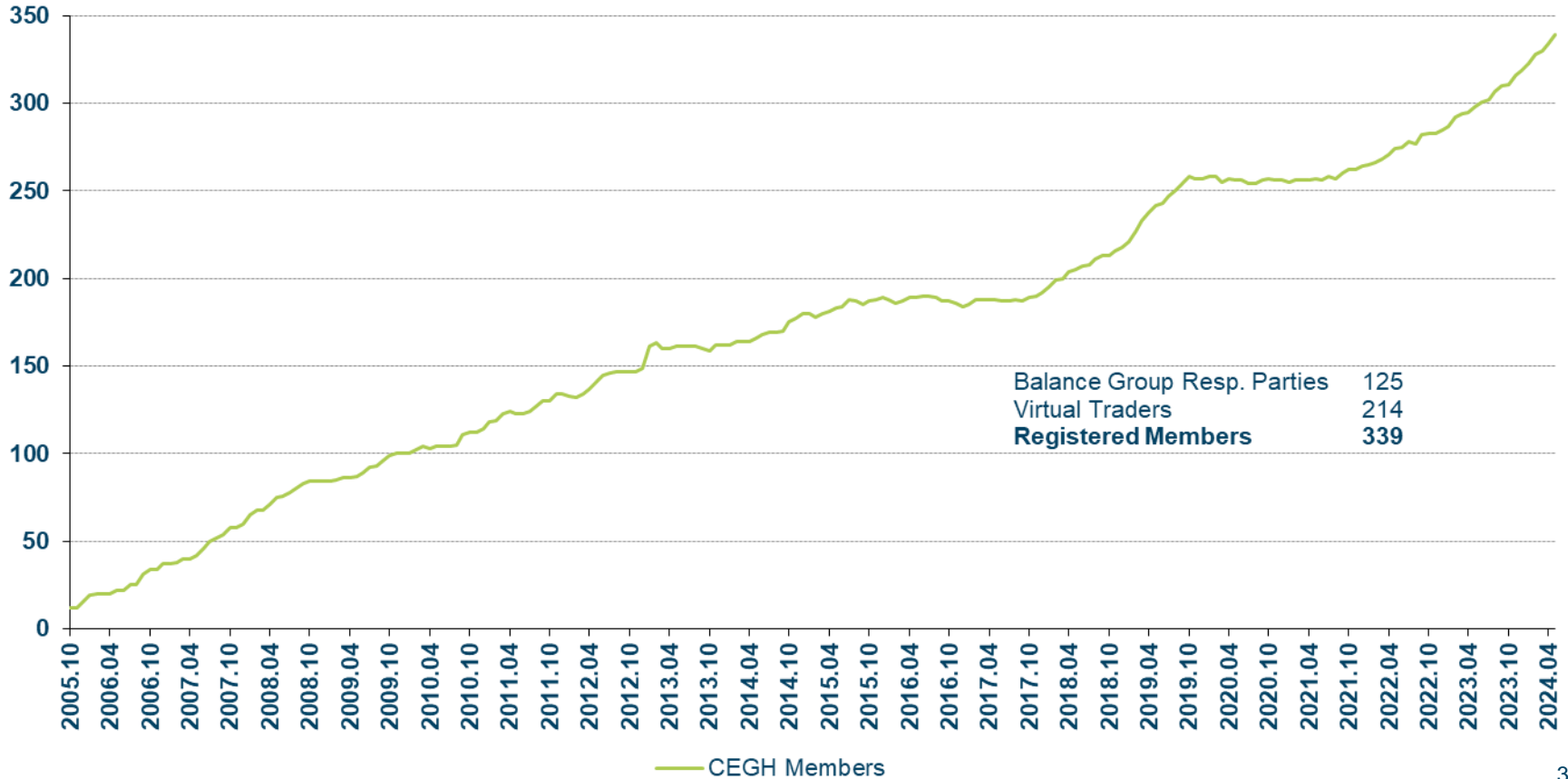
01-05/2024

153.7 TWh

y-t-y: -2.5%



CEGH VTP: Number of Registered Members

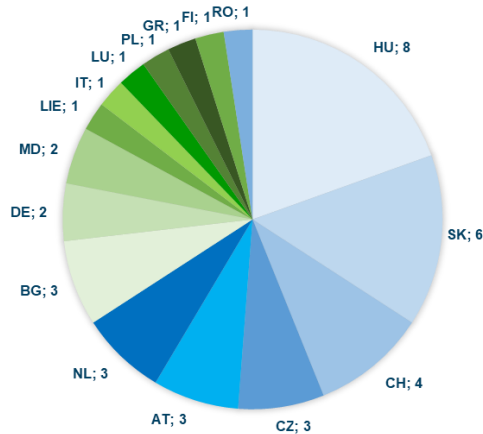


CEGH Customer Development

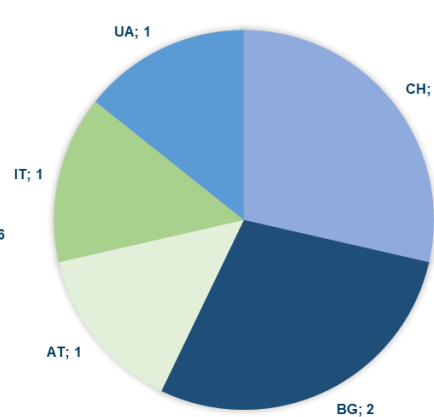


- **New members joining CEGH in 2023:**
41 new members and 7 member terminations
resulting in **319 members** in total at the end of the year.

**NEW CUSTOMERS
CEGH VTP 2023**

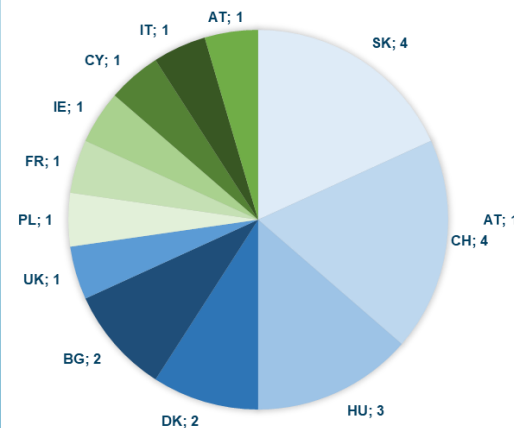


**CUSTOMER TERMINATIONS
CEGH VTP 2023**

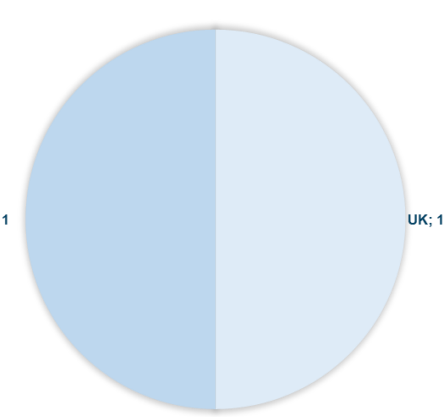


- **New members joining CEGH in 2024:**
22 new members and 2 member terminations
resulting in **339 members** in total by June 2024.

**NEW CUSTOMERS
CEGH VTP 2024**

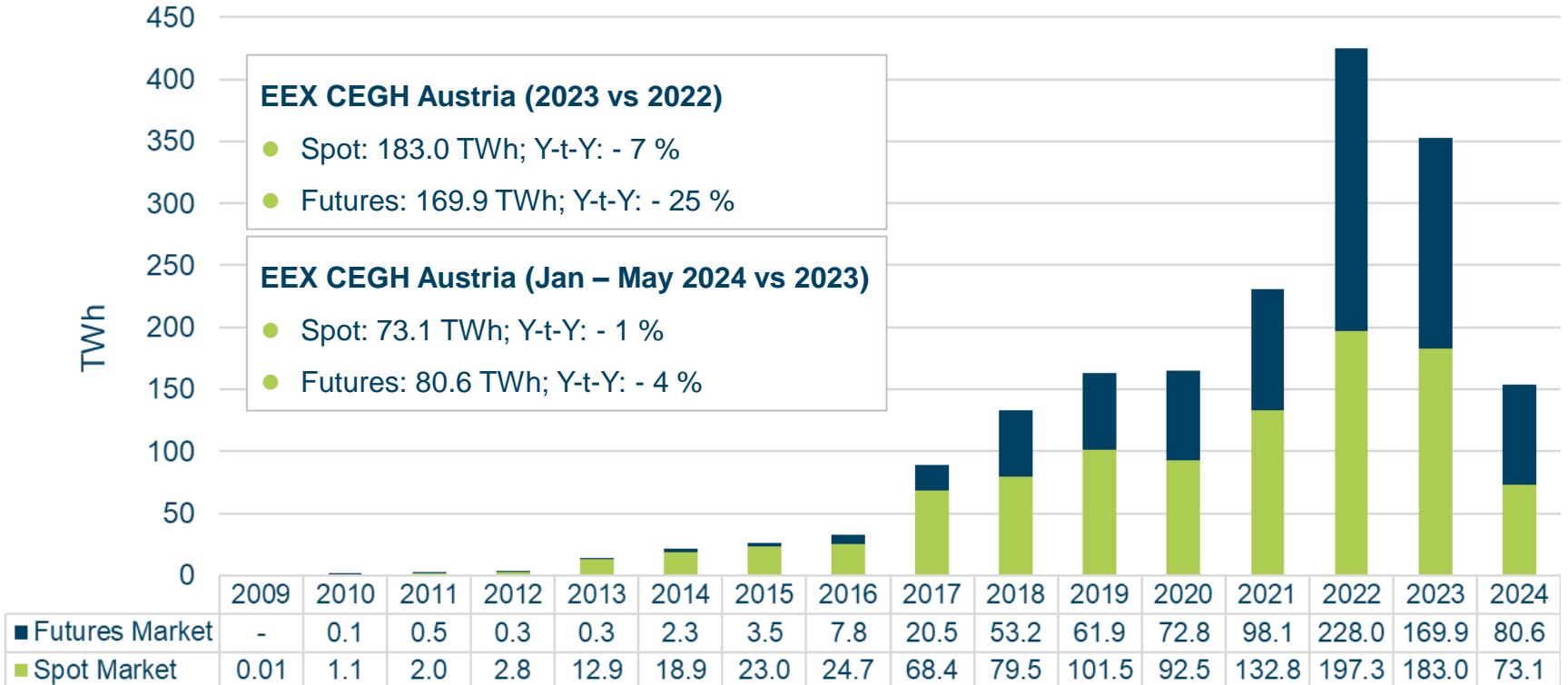


**CUSTOMER TERMINATIONS
CEGH VTP 2024**



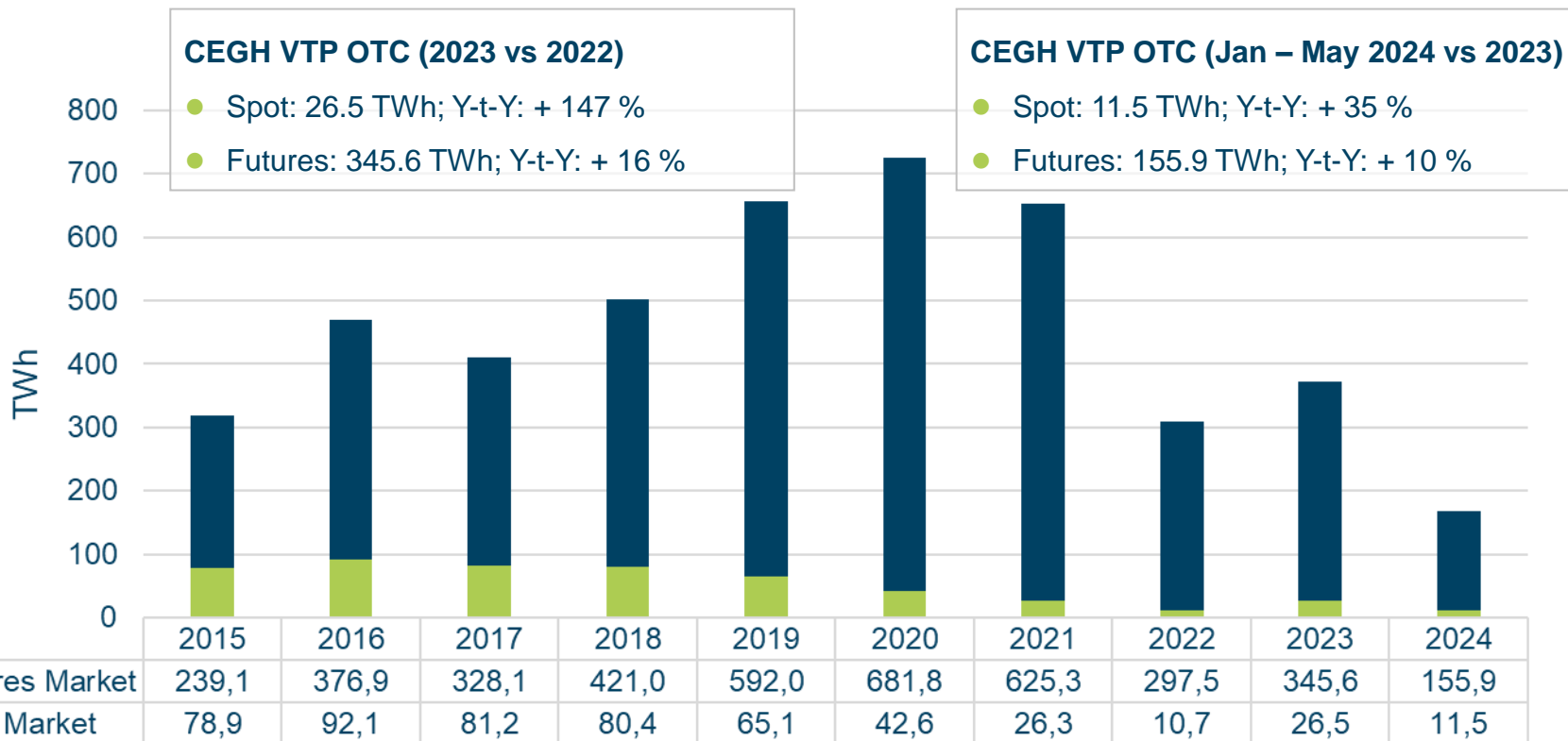
EEX CEGH Austrian Gas Market

Yearly Traded Volumes; January 2009 – May 2024



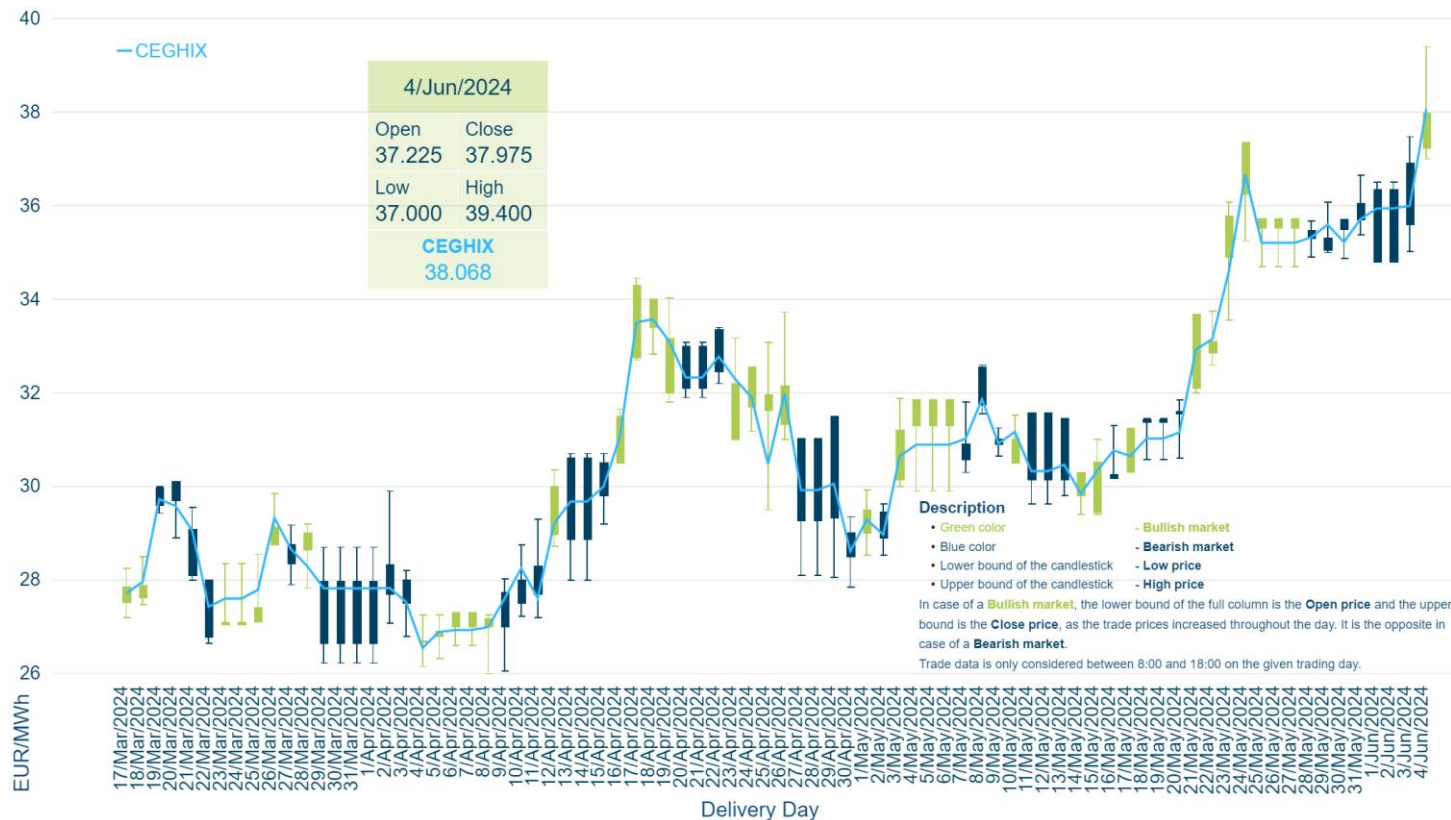
CEGH VTP OTC Gas Market

Yearly Traded Volumes; January 2015 – May 2024



EEX CEGH Spot Prices

Open-Low-High-Close and CEGHIX Spot Index

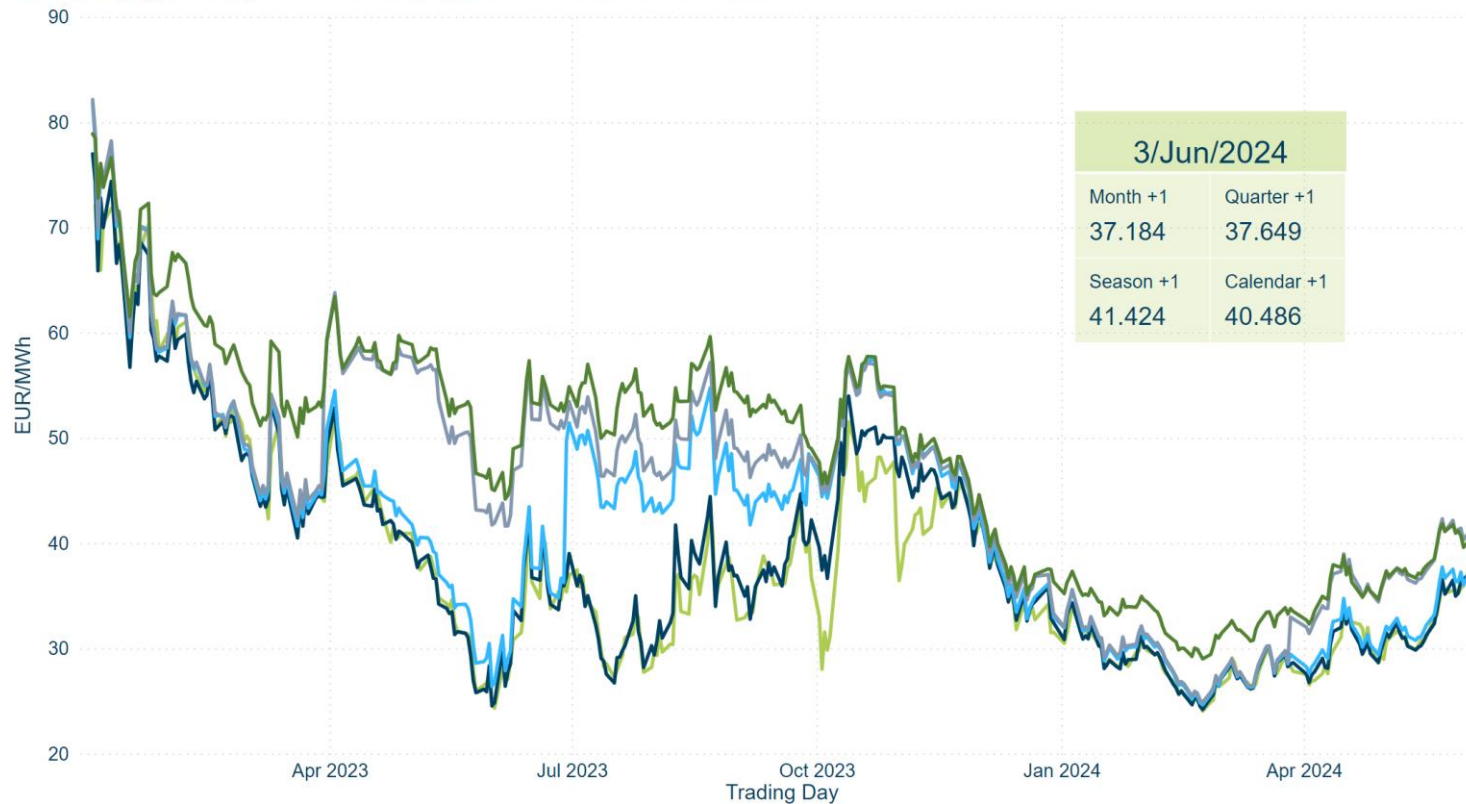


EEX CEGH Futures Prices

Daily Settlement Prices and WAVG CEGHIX since January 2023

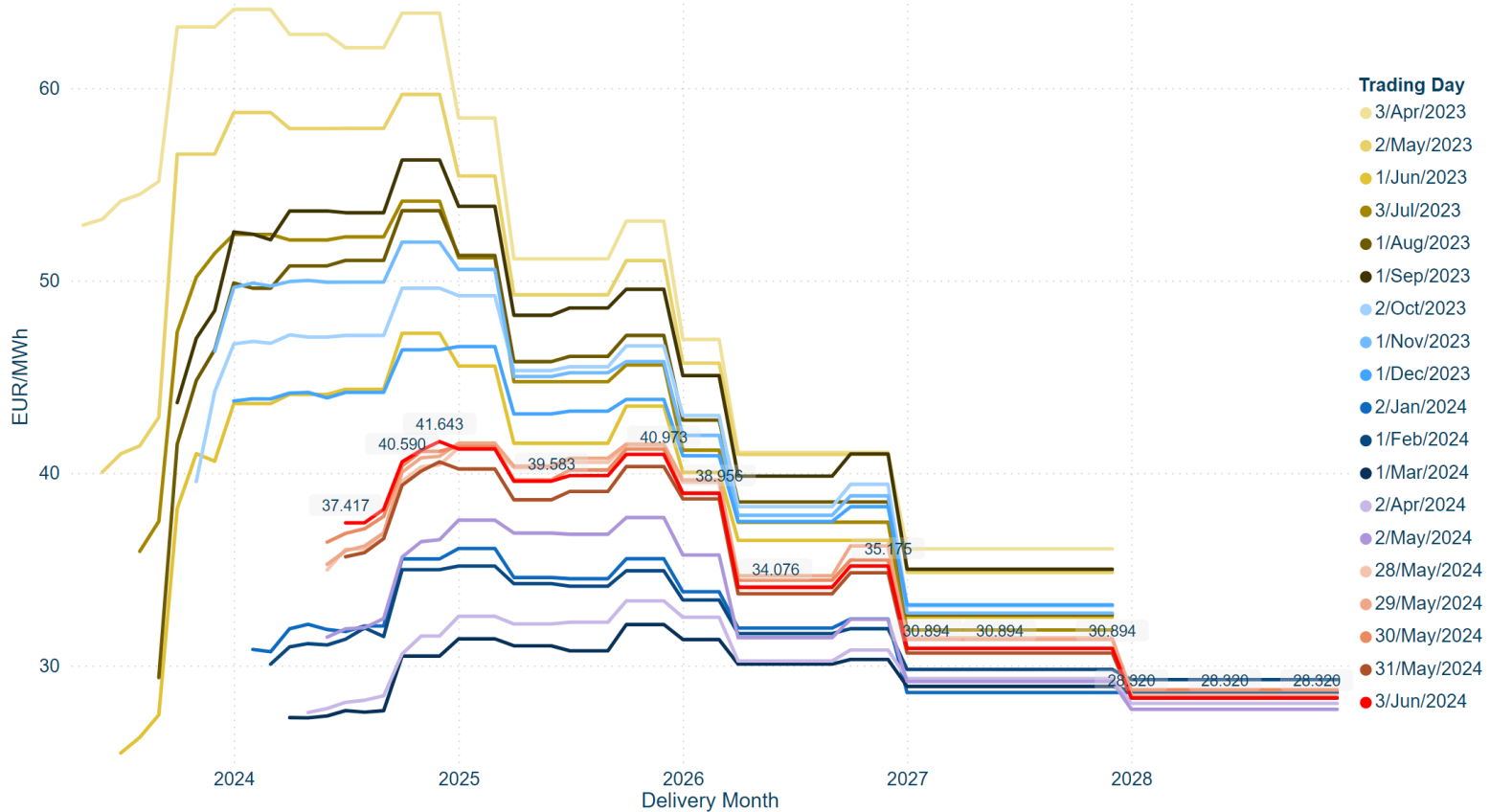


Maturity ● Weighted Average CEGHIX ● Month +1 ● Quarter +1 ● Season +1 ● Calendar +1



EEX CEGH Futures Prices

Arithmetic Average of Daily Settl. Prices for the respective Delivery Month

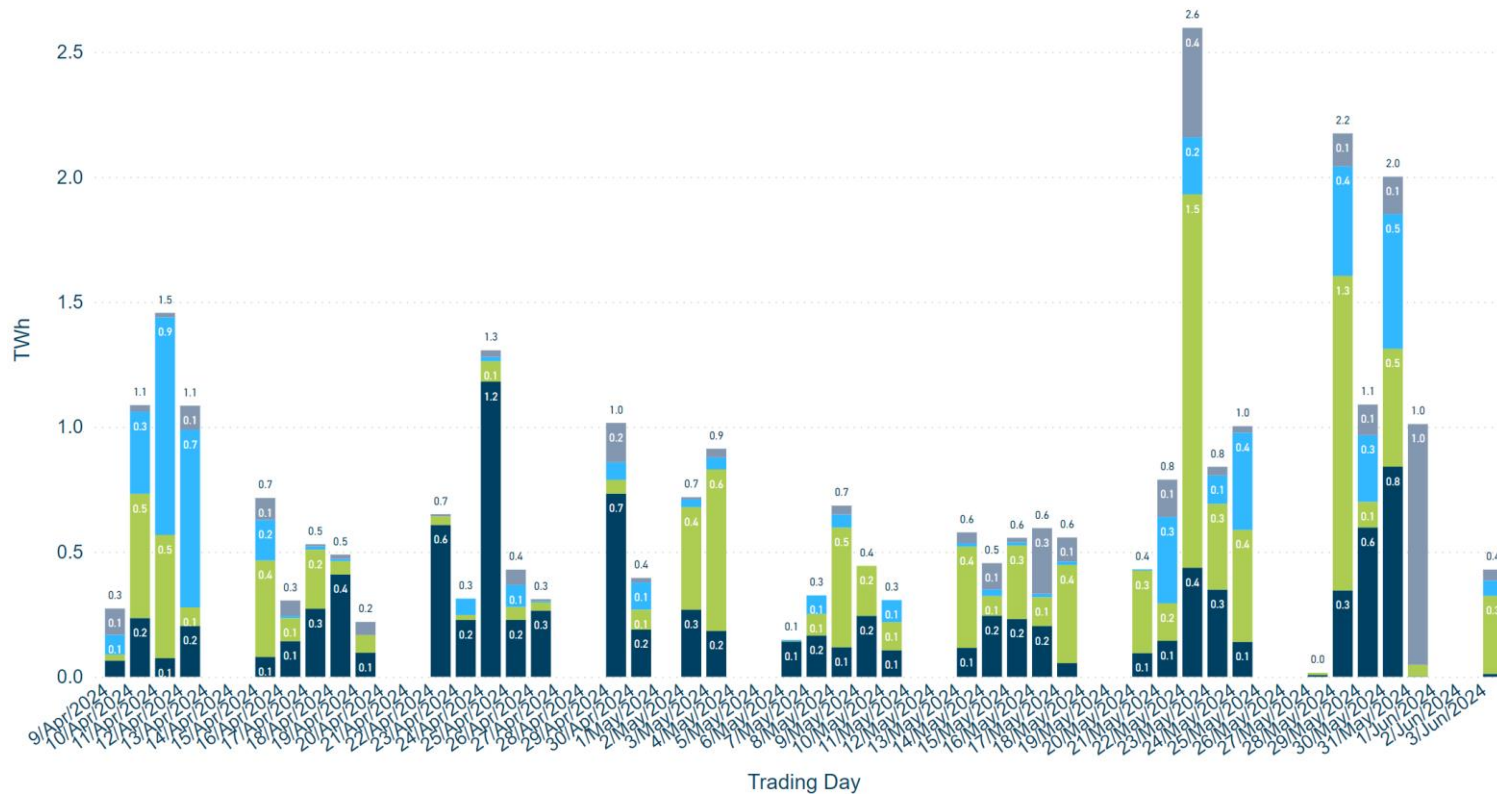


EEX CEGH Futures Market

Daily Traded Volumes

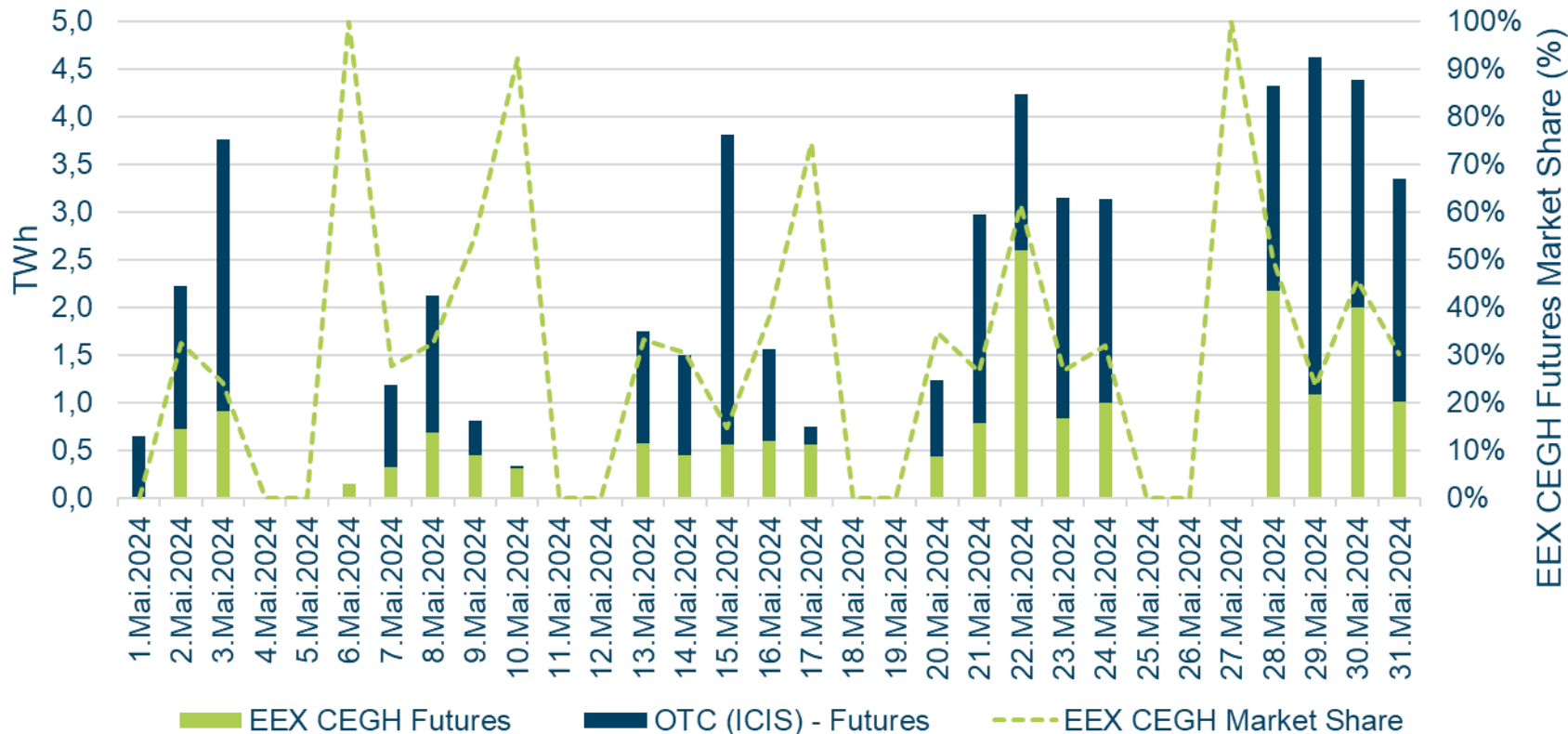


Futures Contract ● Month ● Quarter ● Season ● Calendar



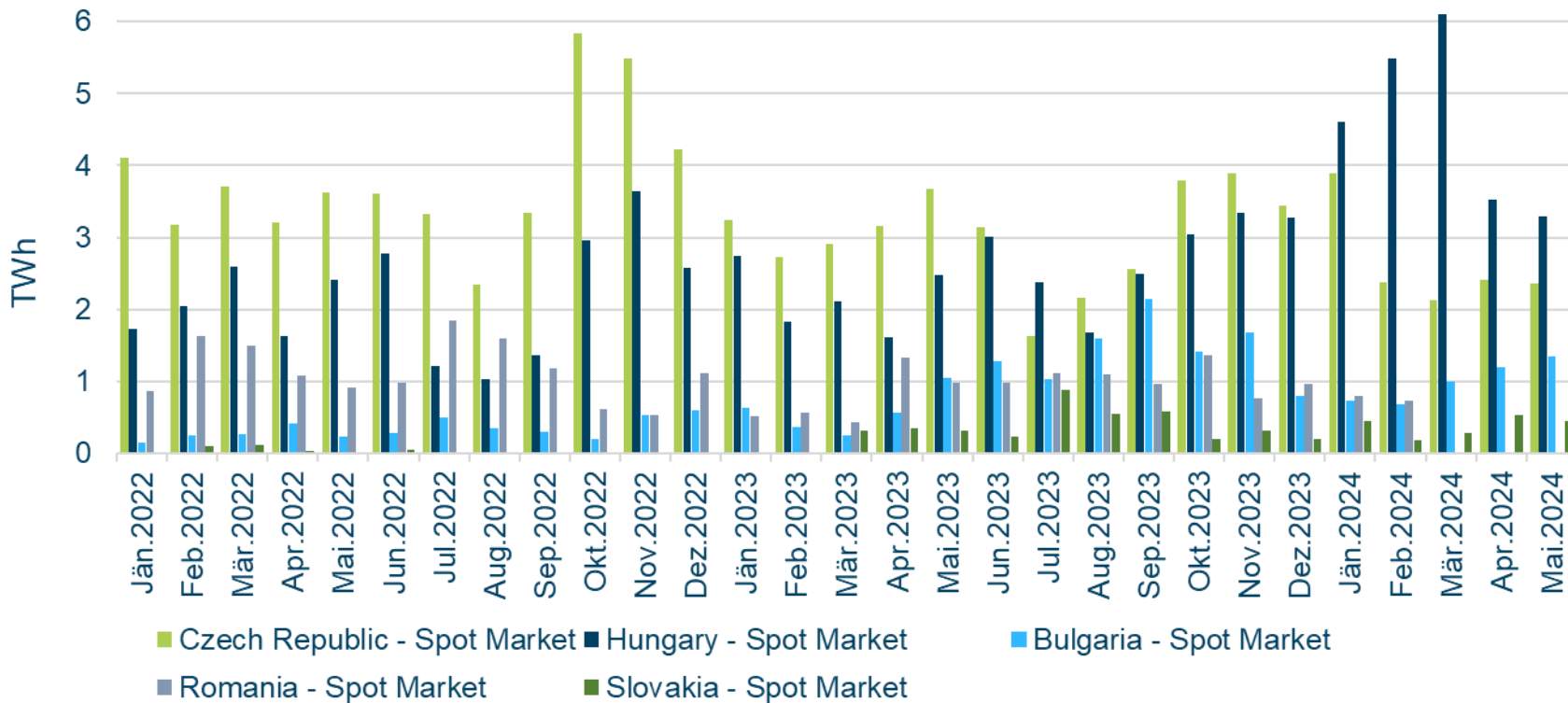
CEGH VTP Traded Volumes - Futures

Daily Traded Volumes



CEE Gas Trading Volumes - Spot

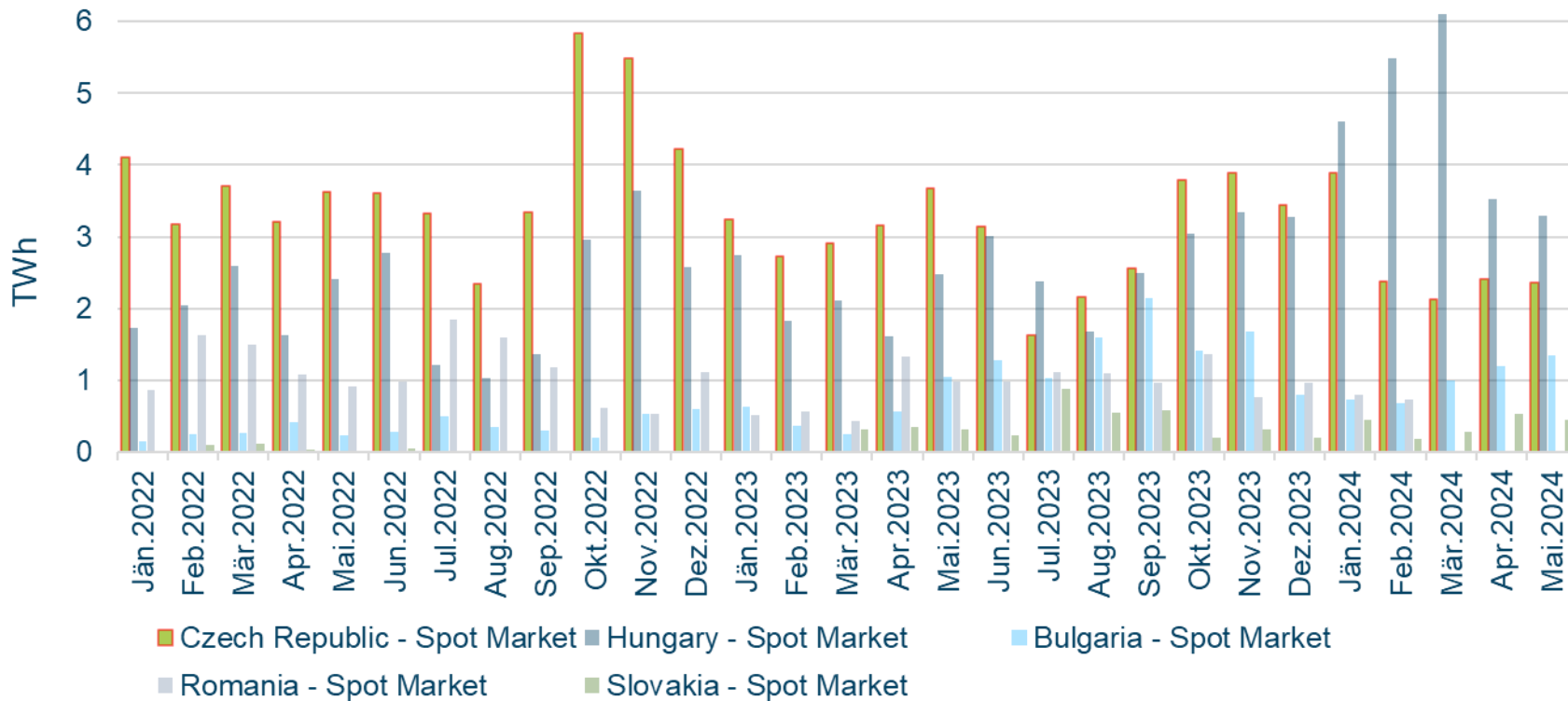
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Czech Rep.) – Spot

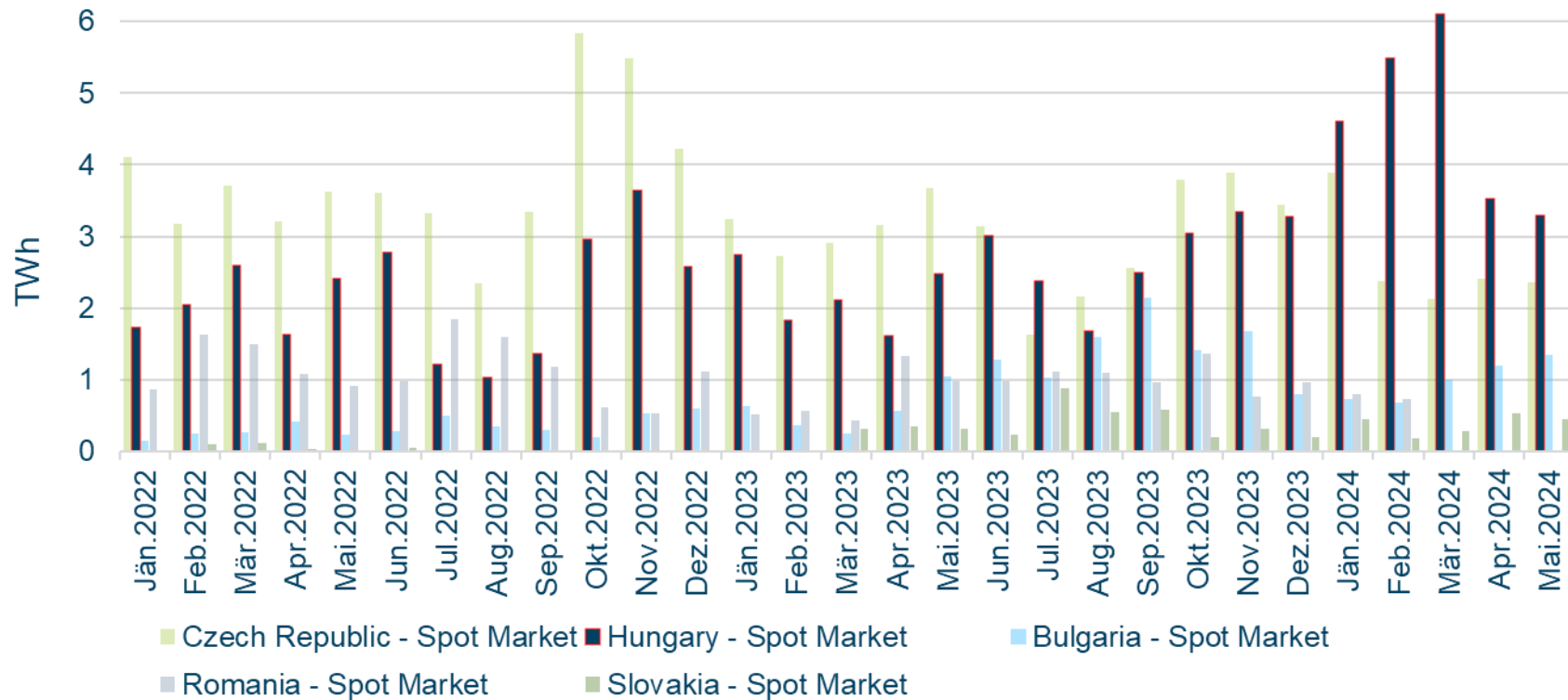
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Hungary) - Spot

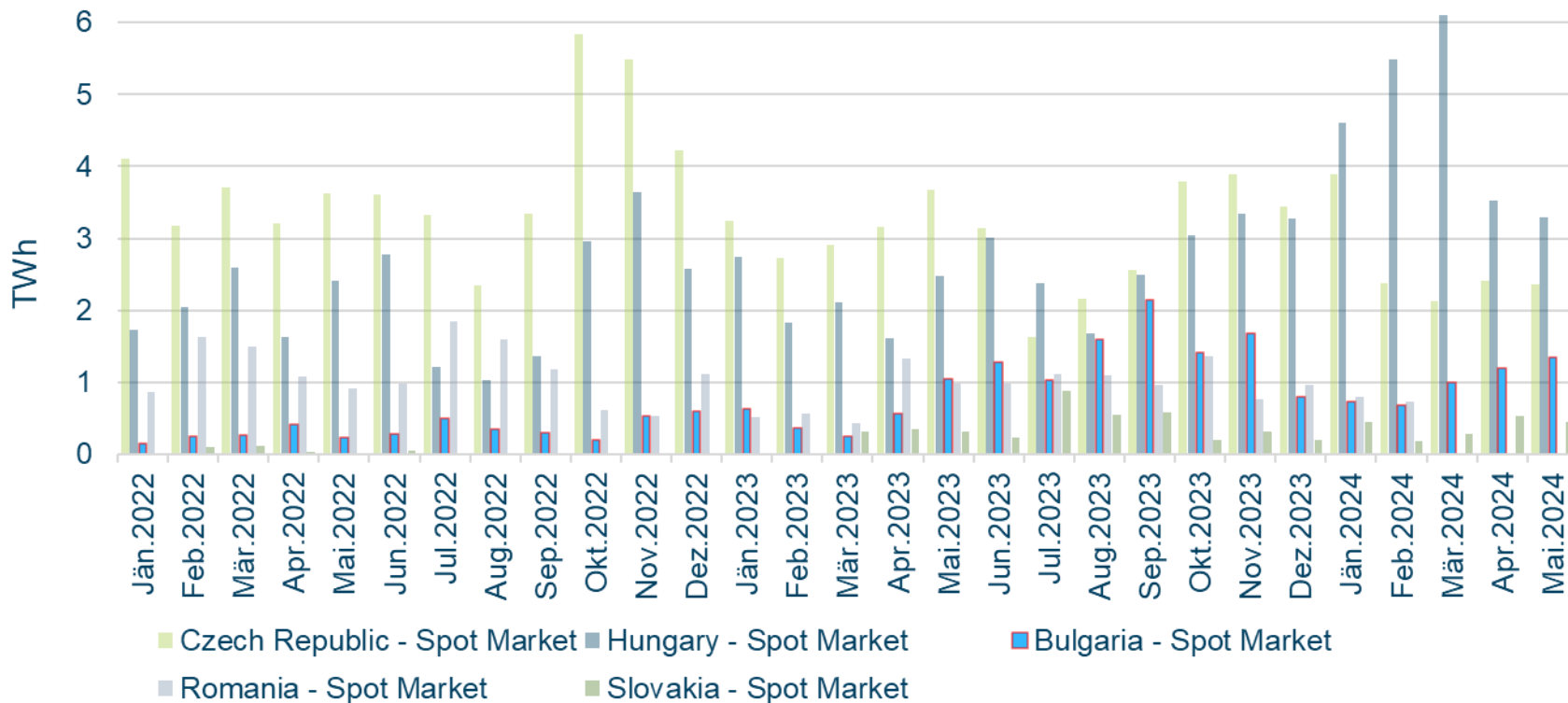
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Bulgaria) - Spot

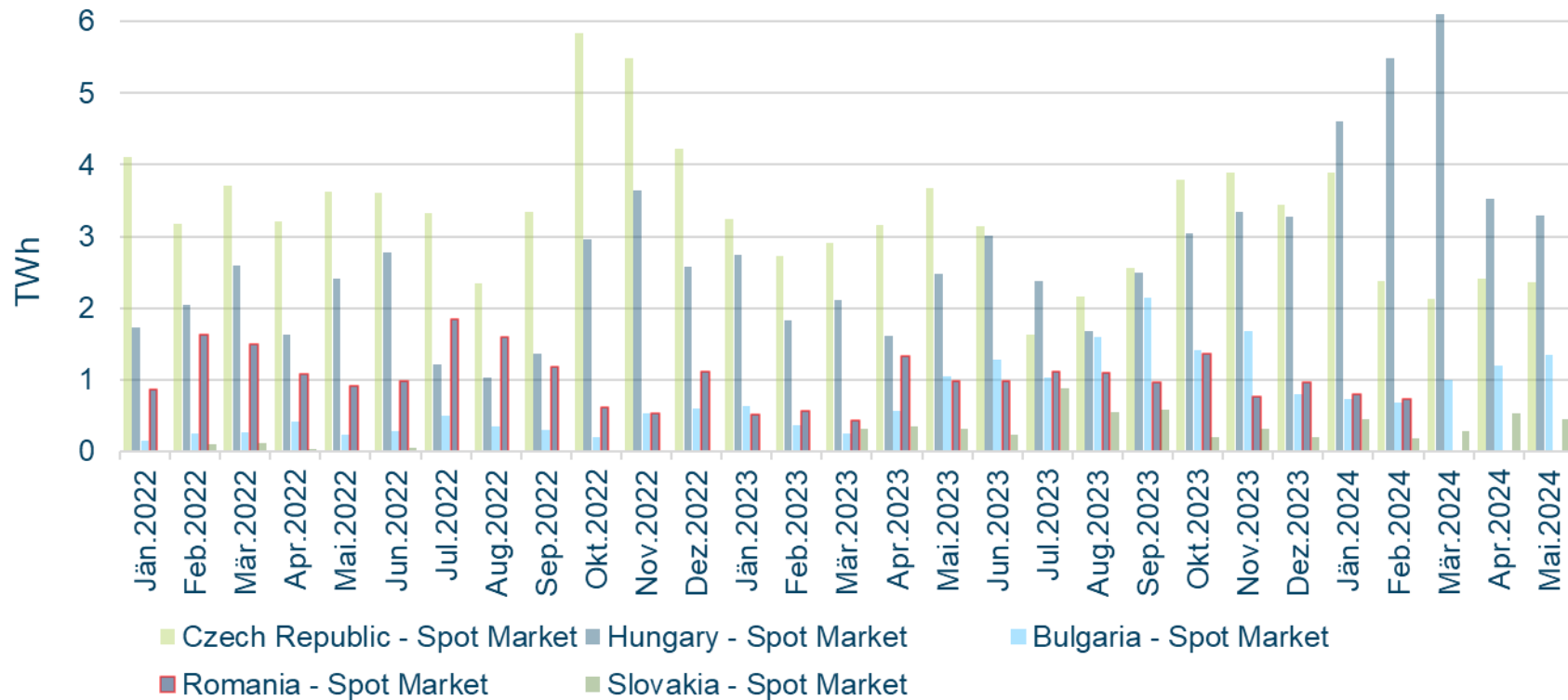
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Romania) - Spot

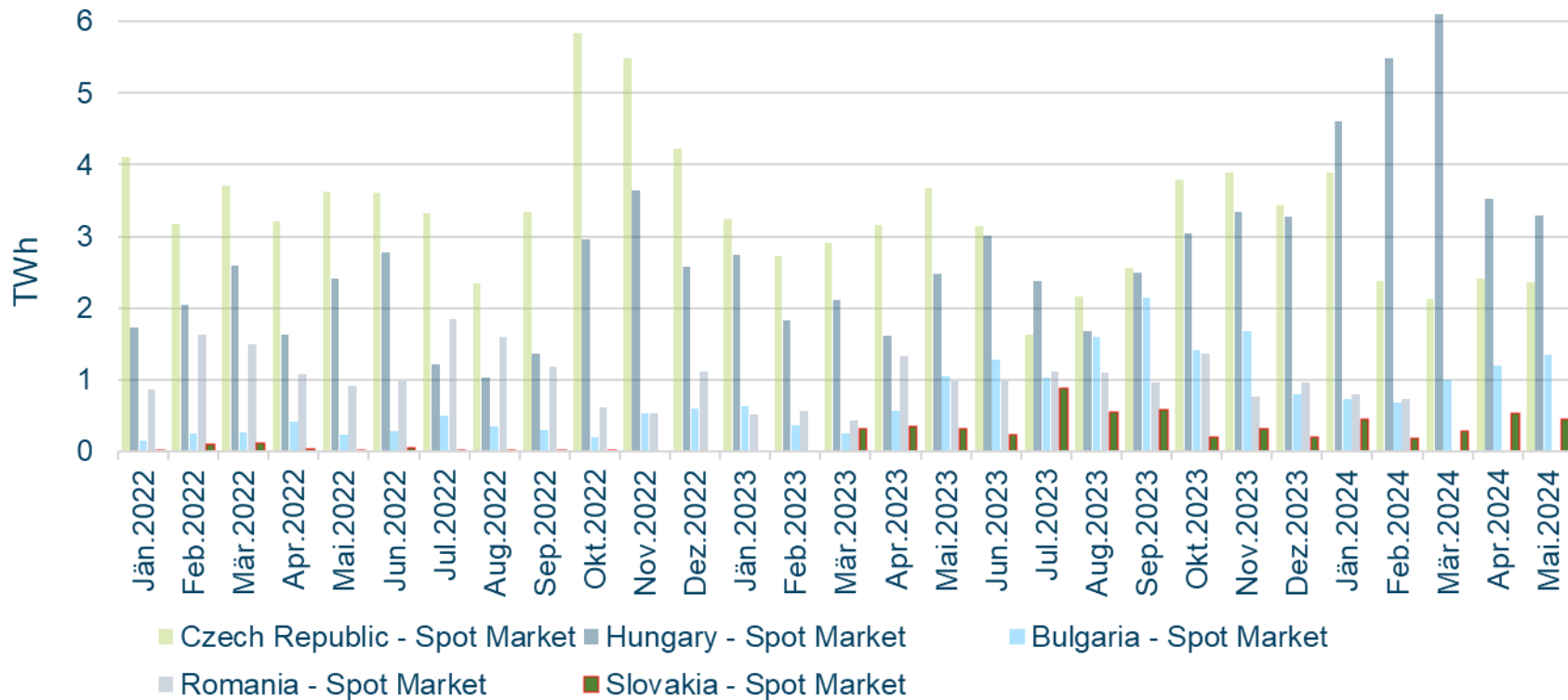
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Slovakia) - Spot

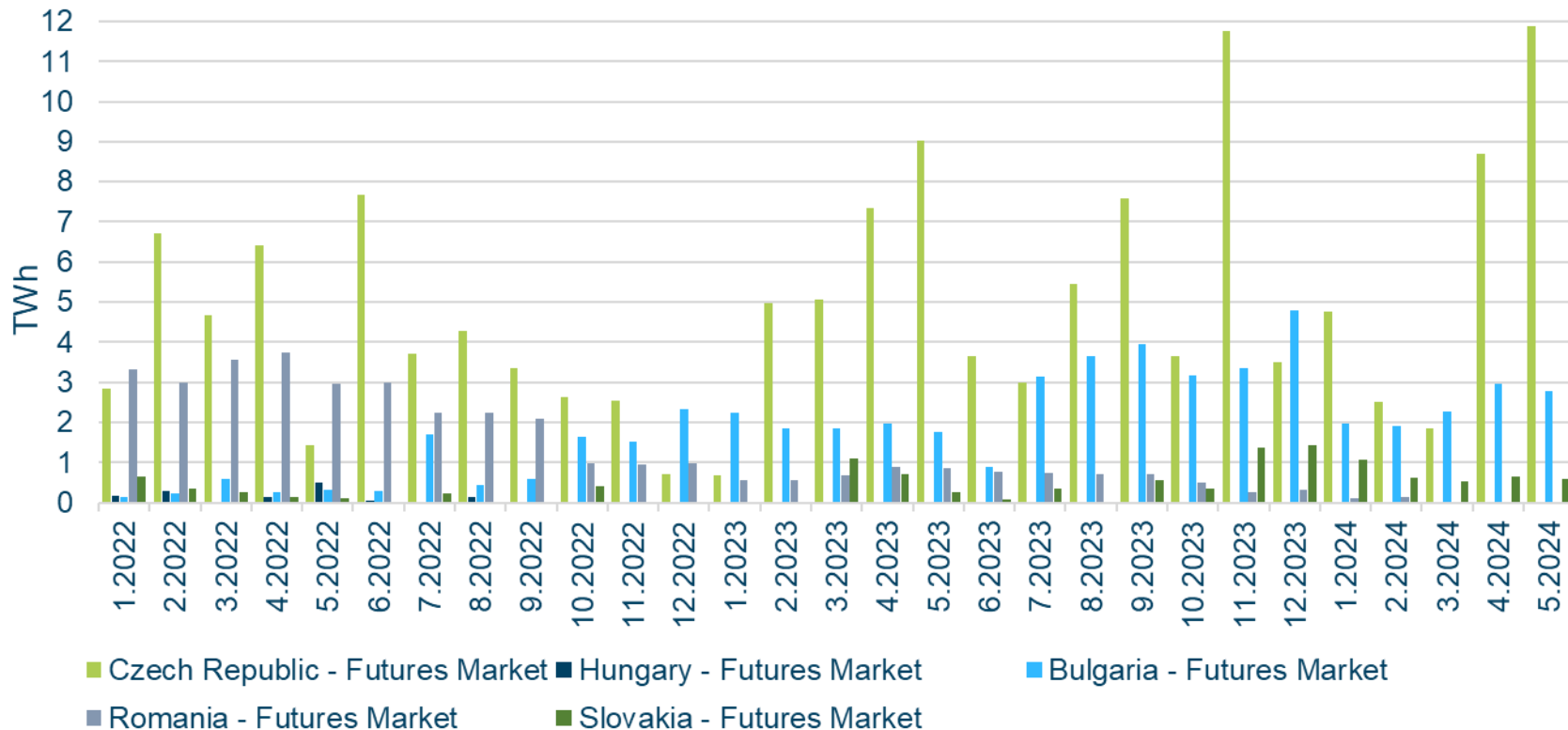
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes - Futures

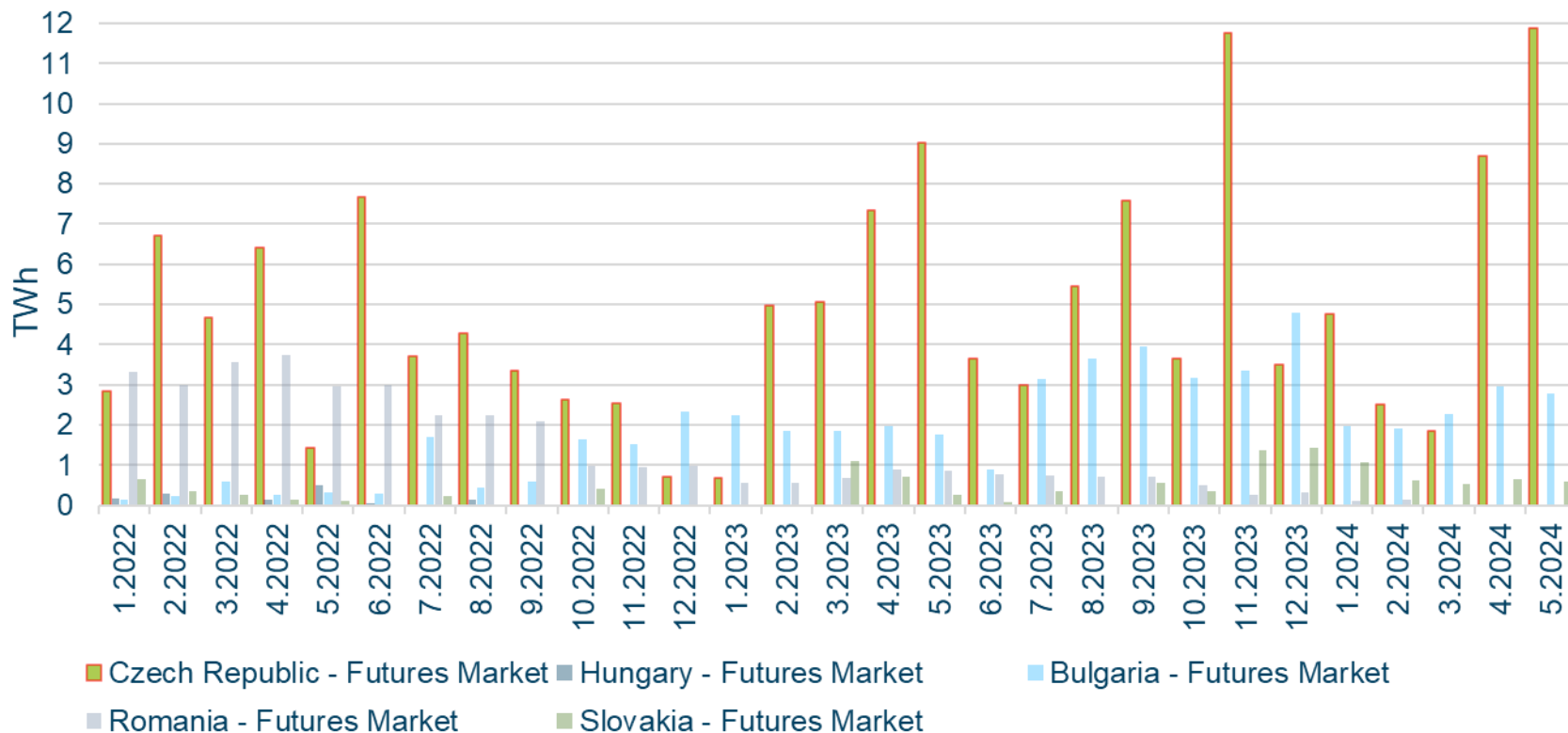
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



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CEE Gas Trading Volumes (Czech Rep.) - Futures

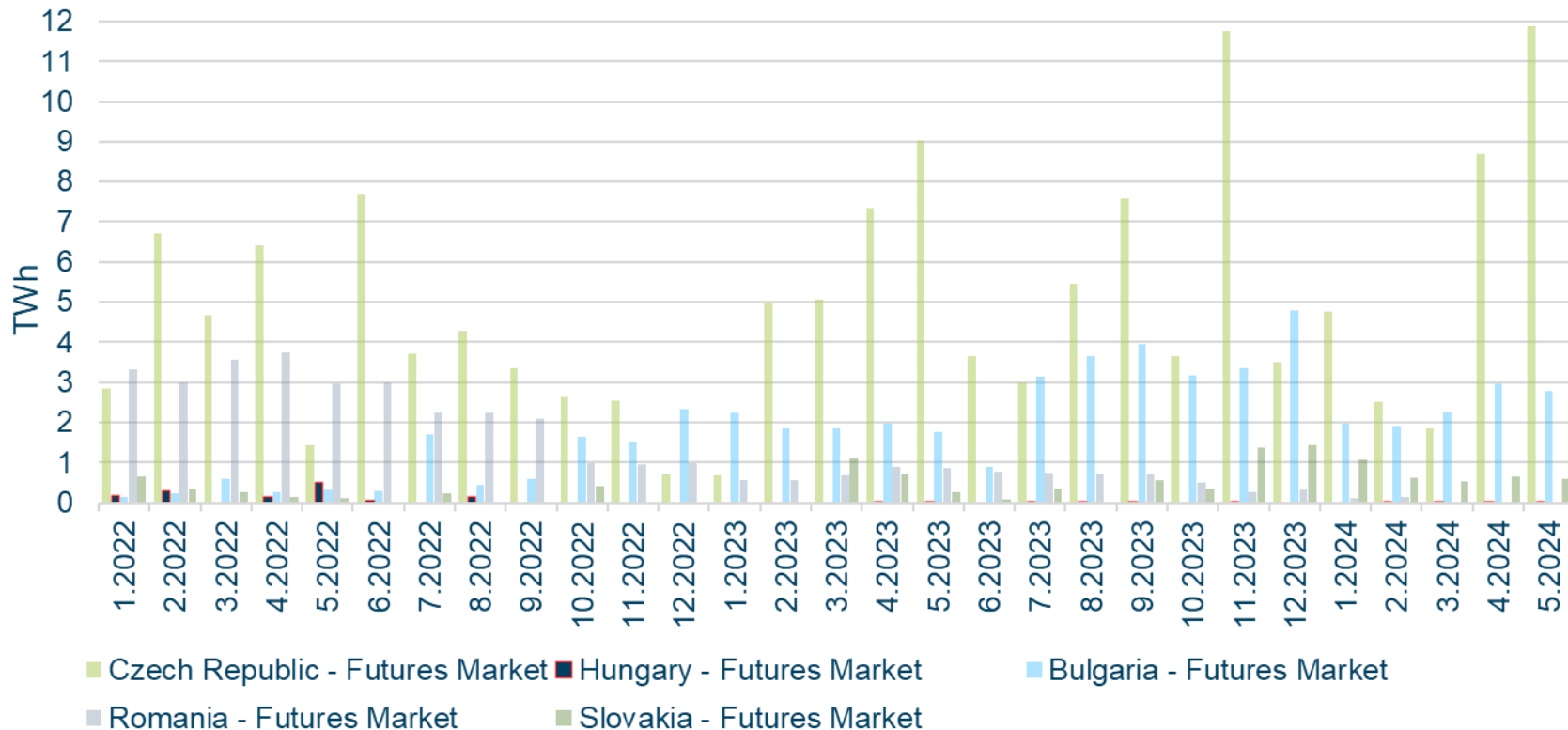
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Hungary) - Futures

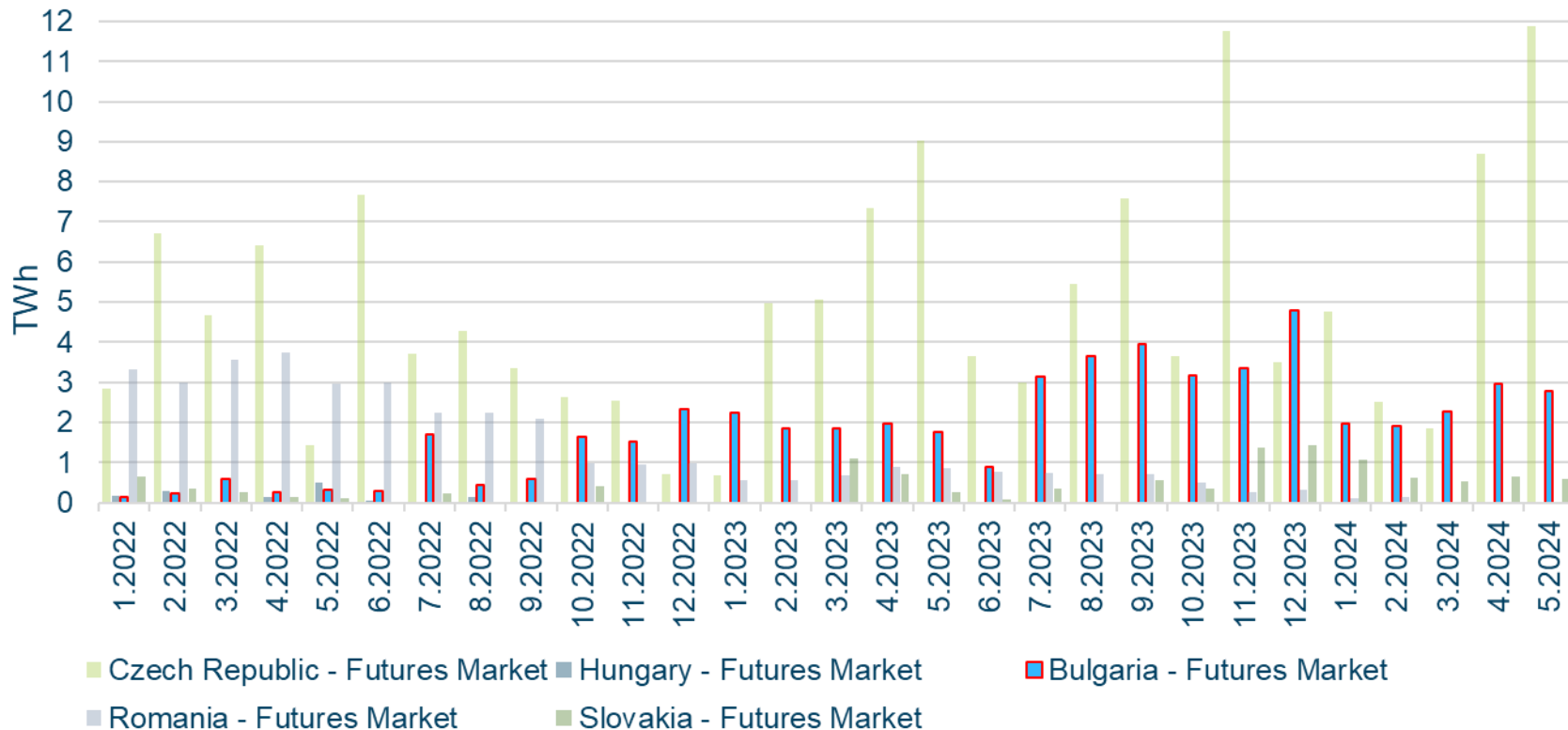
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Bulgaria) - Futures

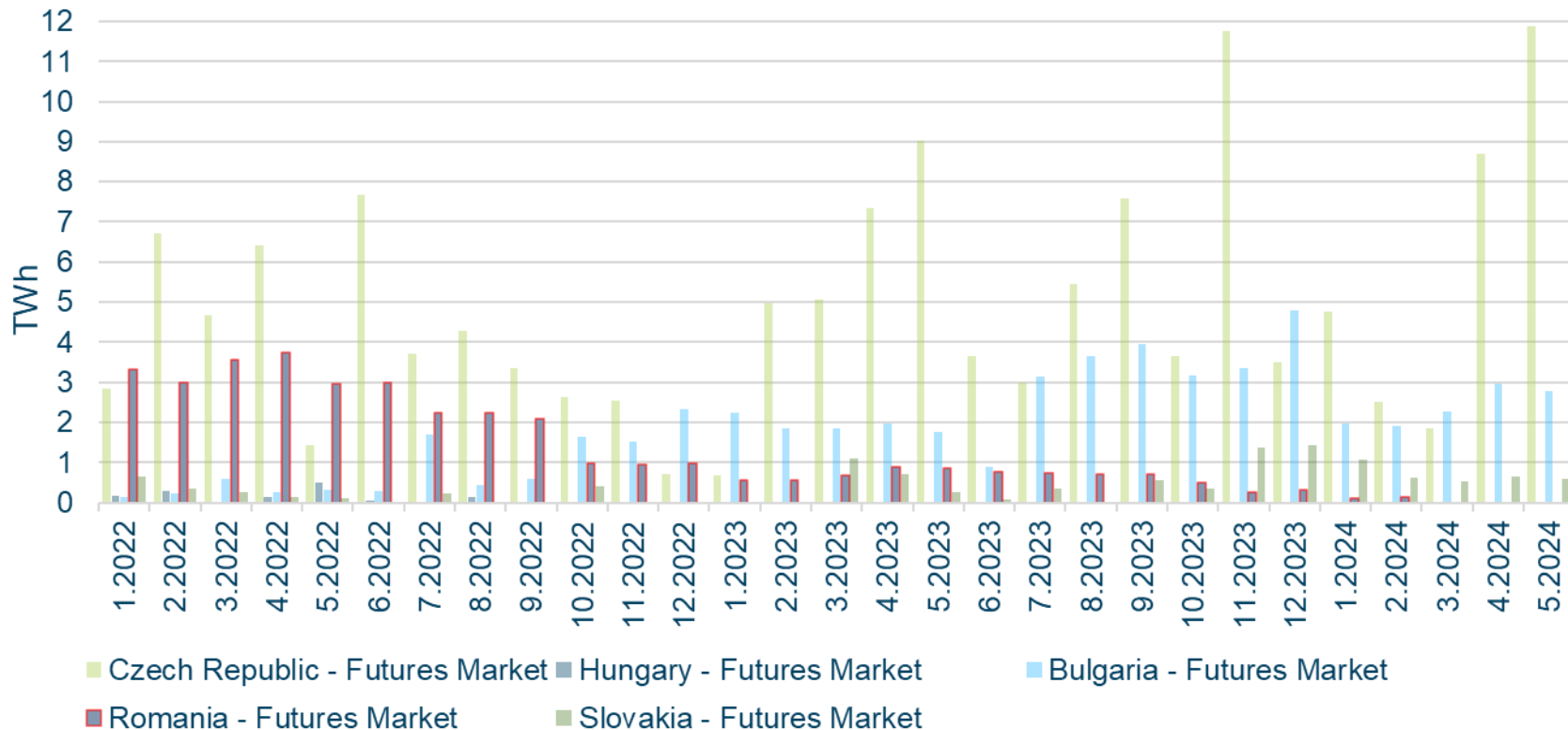
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Romania) - Futures

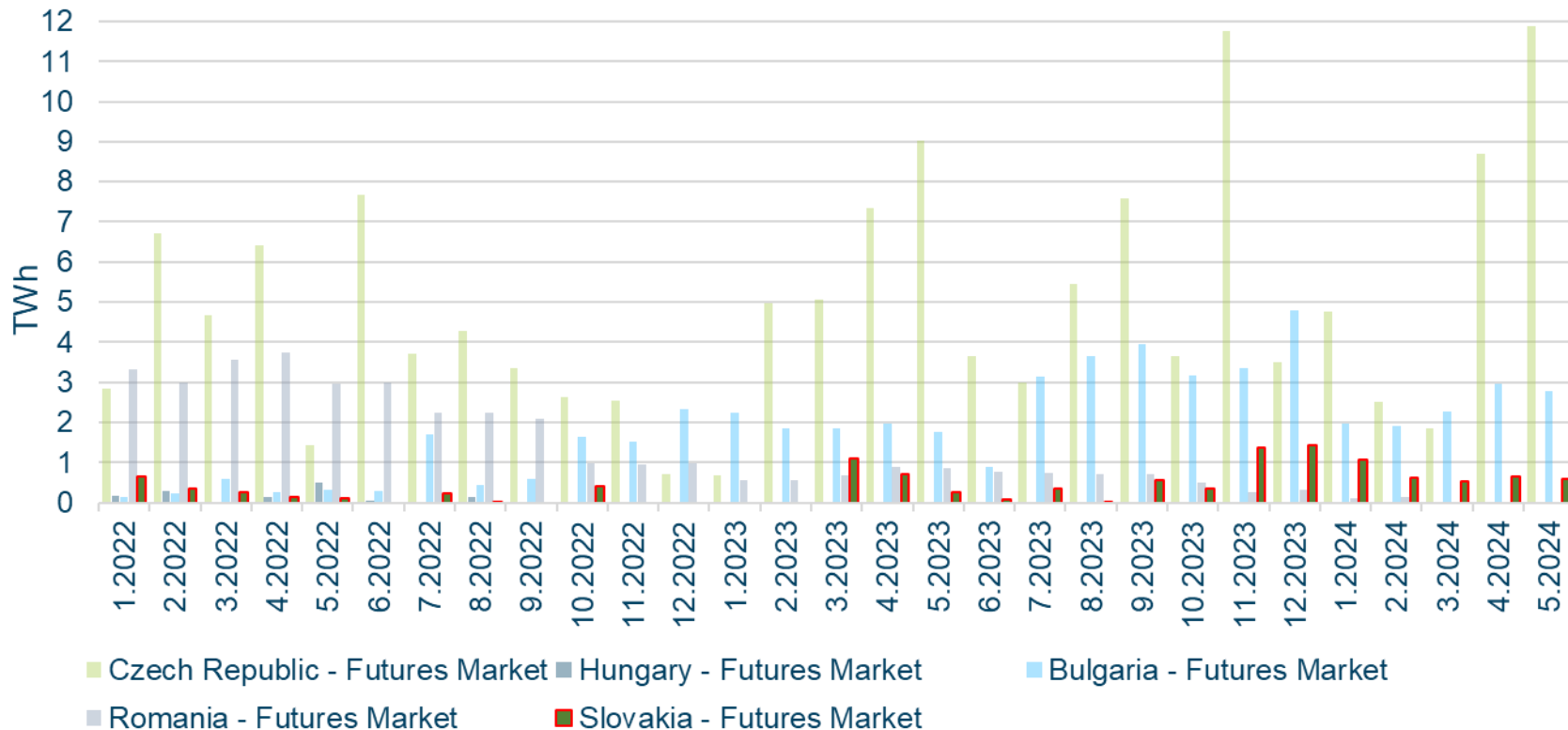
Monthly Wholesale Trading Volumes between January 2022 – May 2024*



*Romania - Feb 2024

CEE Gas Trading Volumes (Slovakia) - Futures

Monthly Wholesale Trading Volumes between January 2022 – May 2024*



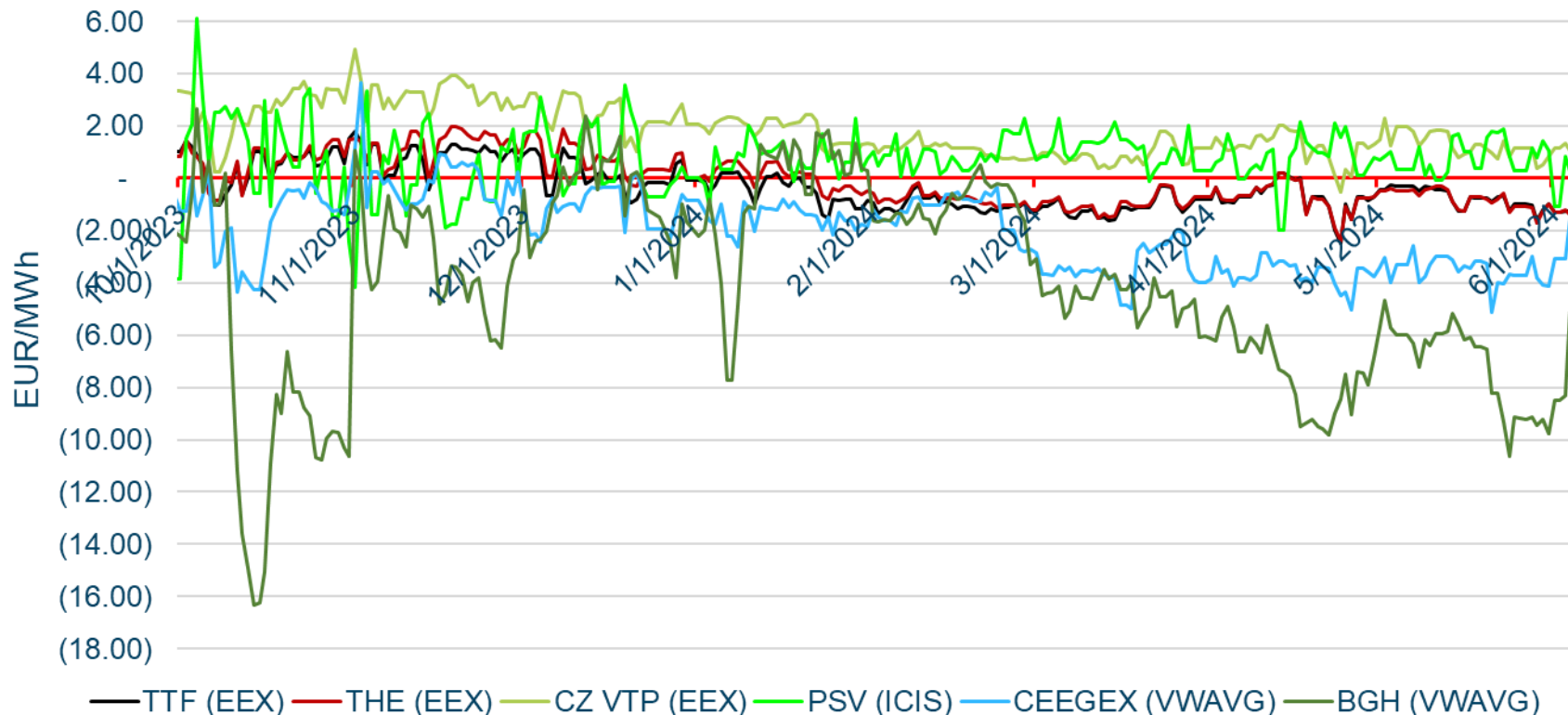
*Romania - Feb 2024

European Spot (DA/WE) Settlement Prices



Regional Spot Prices Compared to CEGHIX

Positive range – more expensive than CEGHIX; negative range – cheaper than CEGHIX



A decorative network diagram on the left side of the page, consisting of a complex web of thin grey lines connecting various nodes. Some nodes are colored in dark blue, lime green, or light blue, while others are grey.

**THANK
YOU FOR
YOUR
ATTENTION**