



LPG market in Romania (retail) 2010

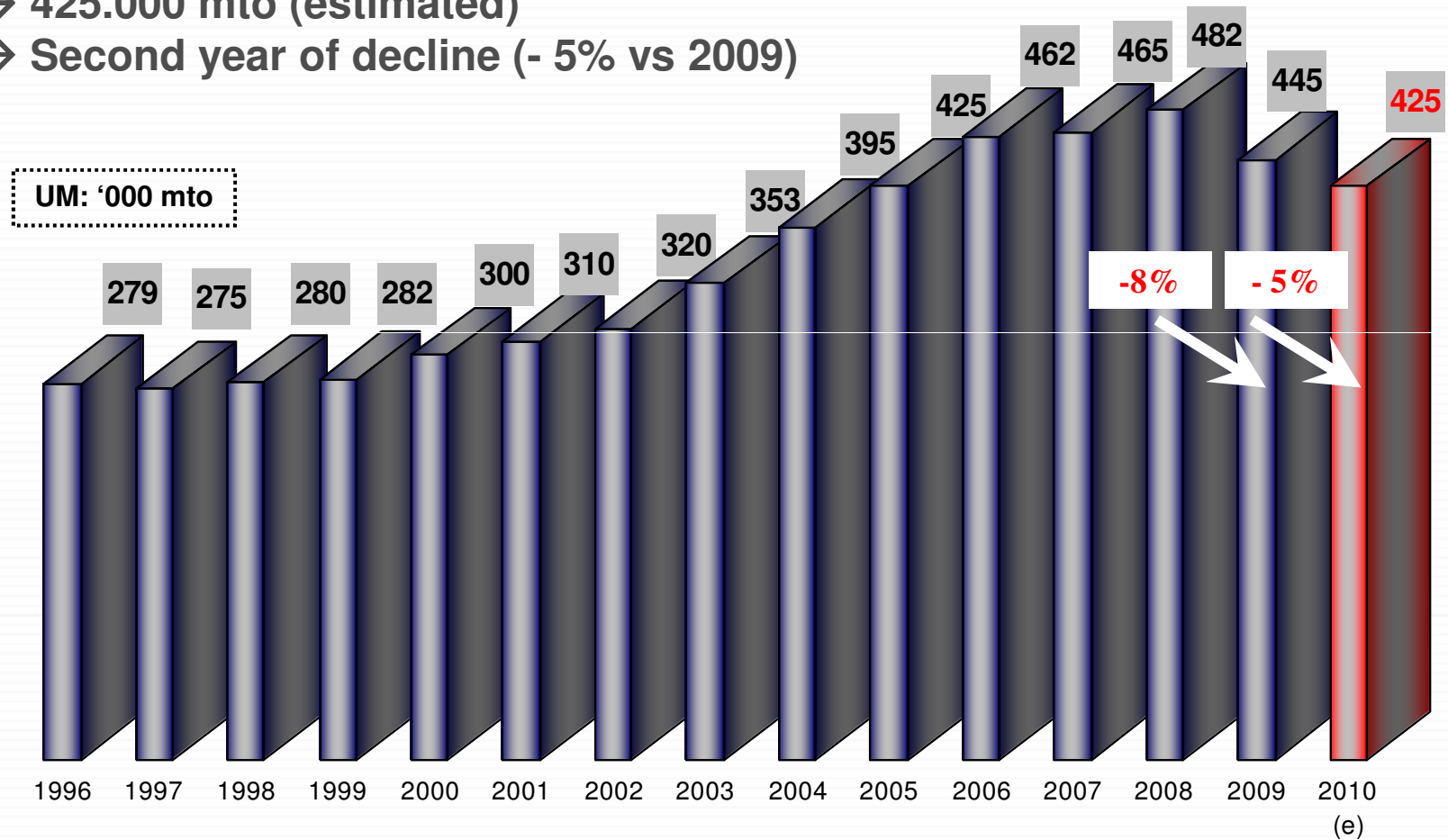
Total LPG market in Romania (retail) 2010

1. Evolution 1996 – 2010 (mto/year)

Total LPG market (retail) in Romania:

→ 425.000 mto (estimated)

→ Second year of decline (- 5% vs 2009)



Source: internal estimate

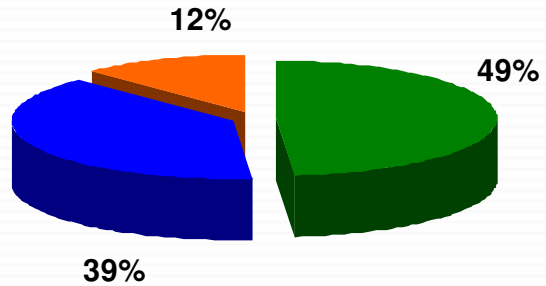
Total LPG market in Romania (retail) 2010

LPG Market structure (retail) - 2010

UM: to

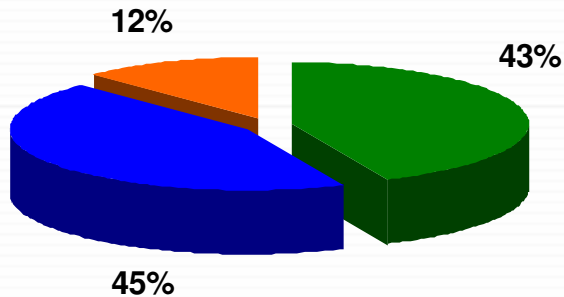
Source: internal estimate

LPG Market Structure / 2009

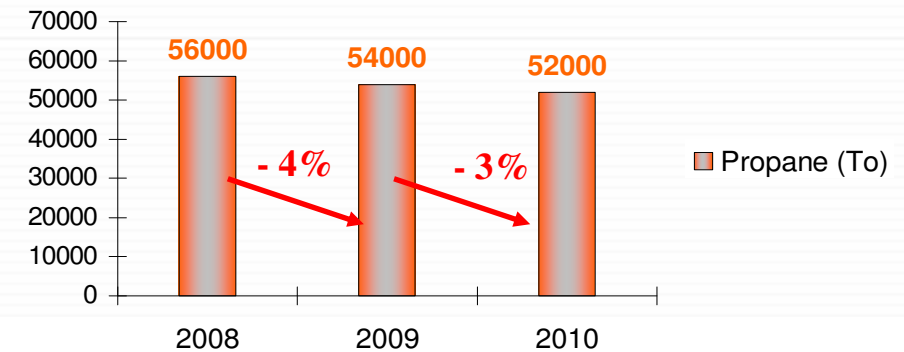
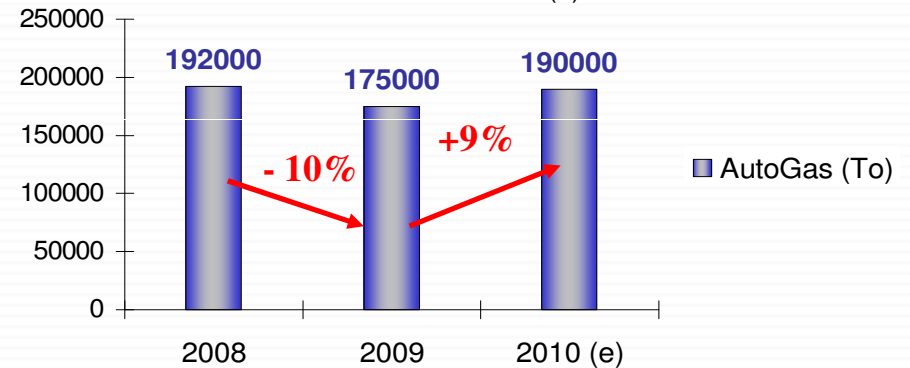
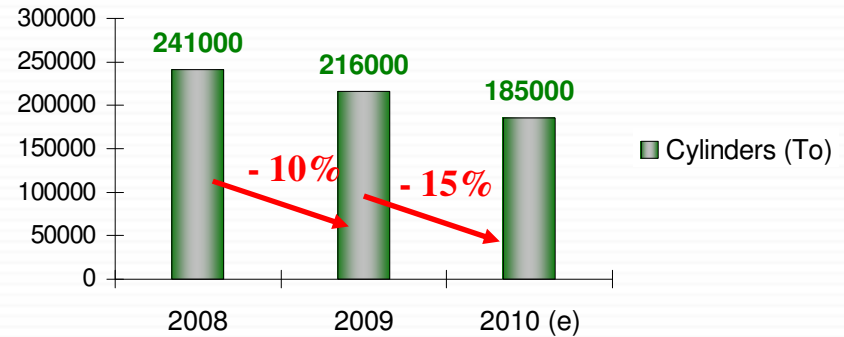


■ Cylinders ■ Auto Gas ■ Propane

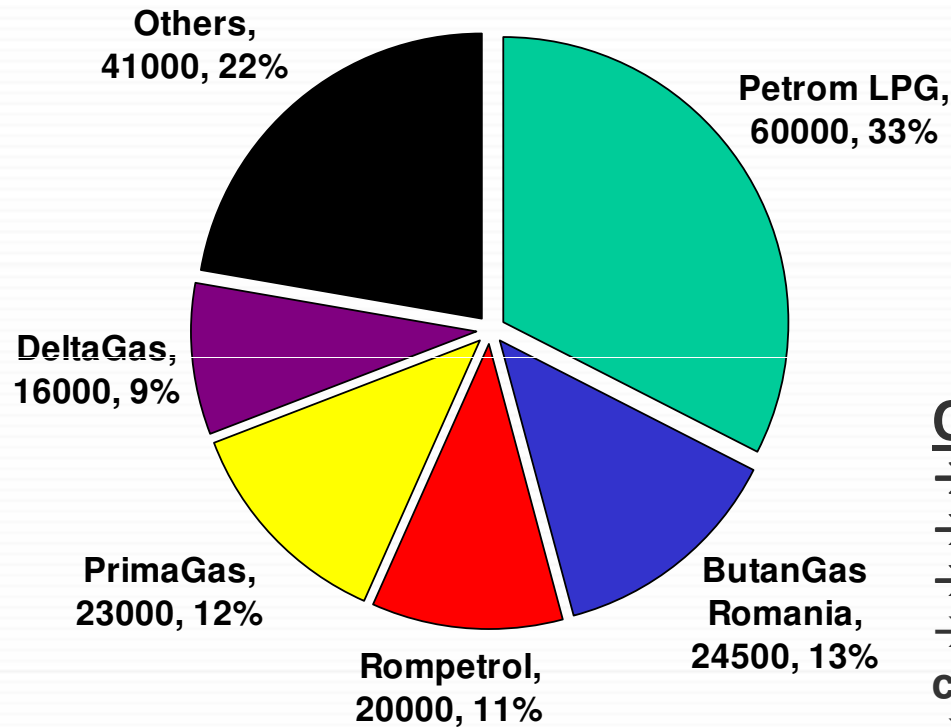
LPG Market Structure / 2010



■ Cylinders ■ Auto Gas ■ Propane



Cylinders MS 2010/ est.



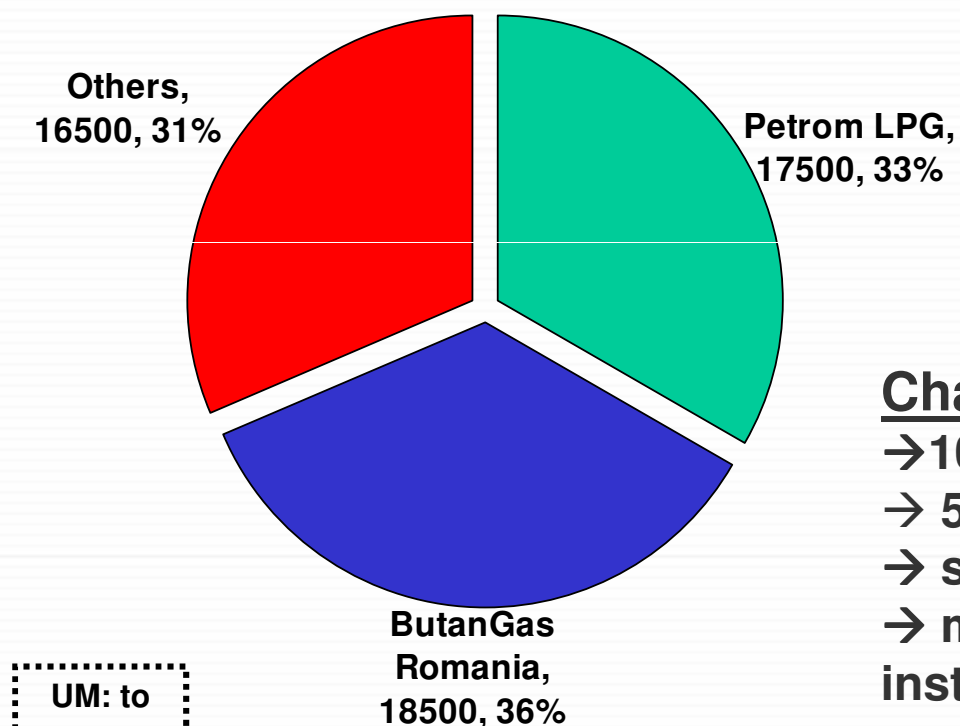
UM: to

Characteristics of the market:

- 61 filling plants;
- 185.000 mto estimated in 2010;
- market in decline (-15% vs 2009);
- cylinders filled to SKIDs (20-30% of the cylinders);
- end price of the bottle: approx. 10% higher than 2009;
- illegal filling of the cylinders.

Source: internal estimate

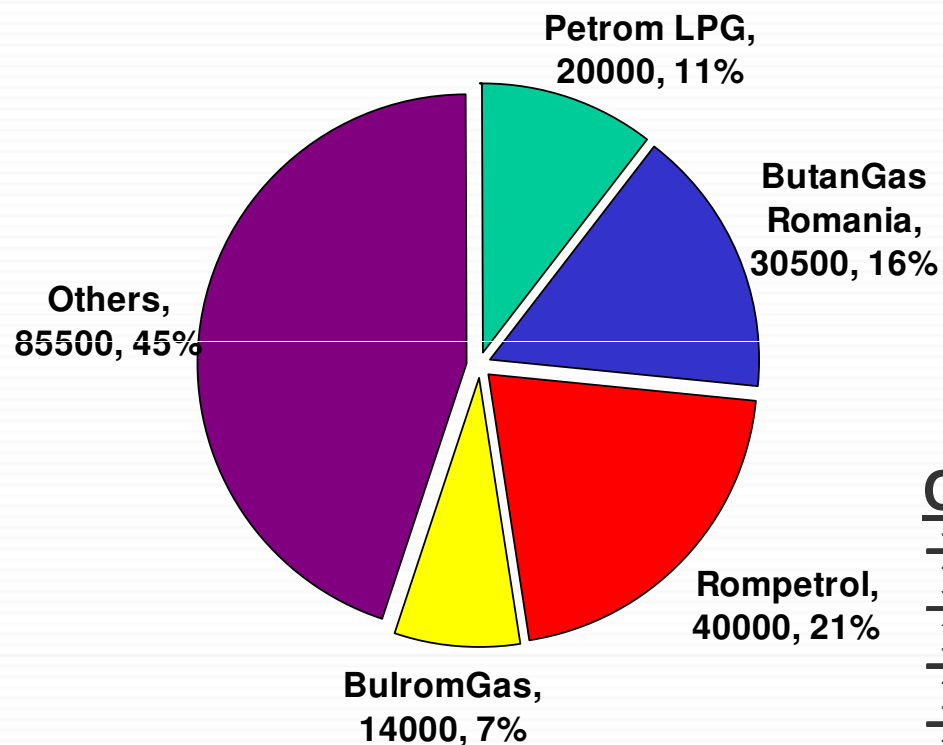
Propane MS 2010/ est.



Characteristics of the market:

- 10.000 installed tanks
- 52.000 mto estimated in 2010
- stable market in terms of volumes
- market in decline in terms of a new installations

Auto Gas MS 2010/ est.



UM: to

Characteristics of the market:

- approx. 1.200 installed SKIDs
- 190.000 mto estimated in 2010
- growing market (+10% vs 2009)
- illegal cylinders filled to SKIDs
- average end price on the pump: 45-50% of the price of gasoline



Thank you!