NATURAL GAS MARKET DEVELOPMENT REPORT

2025

REPUBLIC OF TÜRKiYE
ENERGY MARKET
REGULATORY AUTHORITY

REPUBLIC OF TÜRKİYE
ENERGY MARKET REGULATORY AUTHORITY

Strategy Development Department

ANKARA, 2026

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PRESIDENT'S MESSAGE

As is well known, under the Natural Gas Market Law, the regulation, direction, monitoring and supervision of activities pertaining to the supply of natural gas to end-users in a secure, economic and competitive environment in our country are among the core functions of our Authority. In line with the liberal market structure, founded upon the principle of fostering competition, our primary priorities include enhancing the diversity of market participants, strengthening infrastructure and ensuring supply security on a sustainable basis.

Türkiye's natural gas market is currently undergoing a significant transformation process, driven by recent investments, regulatory reforms and internationally implemented projects. In the initial years following the commencement of our Authority's activities, natural gas services could be provided only in limited regions; today, however, they have been extended throughout the country. As of the end of 2025, the number of settlements with access to natural gas supply reached 982, while the total number of natural gas end-users exceeded 22 million. This progress unequivocally reflects the level attained in Türkiye's natural gas infrastructure and market structure.

In 2025, investments aimed at reinforcing the natural gas infrastructure continued unabated. The length of the transmission system exceeded 20.000 kilometres, while the distribution network surpassed 225.000 kilometres. When evaluated together with the fact that underground natural gas storage capacity has reached 6.3 billion Sm³, as well as LNG terminals and FSRU investments, it is evident that our country has achieved a highly robust and flexible infrastructure in terms of natural gas supply security.

Domestic natural gas production, which stood at approximately 807 million m³ in 2023, rose to roughly 2,26 billion m³ in 2024 and reached 3,11 billion m³ in 2025. The principal driver behind this sharp increase in domestic production in recent years has been the growing supply to the market of natural gas produced in the Sakarya Gas Field in the Black Sea. In 2025, 2.81 billion m³ of the natural gas produced was obtained exclusively from the Sakarya Gas Field, corresponding to approximately 80% of total domestic production. This development has not only contributed to supply security but has also constituted a significant turning point in reducing our import dependency.

Furthermore, spot pipeline gas import practices, which provide considerable flexibility in natural gas imports, remain in effect. Through spot pipeline gas imports realised via the entry points of Russia-Kıyıköy, Azerbaijan-Türkgözü and Iran-Gürbulak, resource diversification has been enhanced. When assessed in conjunction with long-term import contracts, LNG infrastructure and storage facilities, our country has sustained its robust structure, which ensures uninterrupted natural gas supply to all consumer groups.

In 2025, various amendments were made to the Natural Gas Market Licensing Regulation with a view to advancing the development of the natural gas market and enhancing our country's energy supply security. These amendments were primarily designed to establish detailed secondary legislation in line with the changes introduced to the Natural Gas Market Law No. 4646 in 2024. In this framework, the regulatory amendments enacted in 2025 determined the procedures and principles governing import licence applications, re-regulated the rights and obligations of import licence holders, established the rights and obligations pertaining to the newly defined liquefaction activity, and introduced the necessary provisions to enable exports to multiple countries under a single export licence, as envisaged by the aforementioned legislative amendments.

As EMRA, we remain resolute in implementing all necessary regulatory measures to support the development of the natural gas market. In consultation with our market players and with the contributions of our stakeholders, we shall continue our efforts to strengthen our country's energy supply security, to advance the objective of establishing Türkiye as a natural gas trading hub, and to render our sector more competitive.
In my capacity as the President of the Energy Market Regulatory Authority, I trust that the 2025 Natural Gas Market Development Report will serve as a guiding and beneficial resource for all stakeholders.

Mustafa YILMAZ
President

Executive Summary

- **Production**

In 2025, a total of 3.110,97 million Sm³ of natural gas was offered for sale by nine companies holding wholesale distribution licenses and engaged in domestic production. The volume of gas produced and supplied to the market increased by 37,71% compared to 2024. A significant portion of this increase stemmed from the rise in production volume in 2025, following the commencement of production and injection into the system as of September 2023 from the natural gas discovery made in the Sakarya Gas Field in the Black Sea.

- **Imports**

In 2025, a total of 58.336,57 million Sm³ of natural gas was imported, representing an 11,73% increase compared to 2024. In 2025, Russia accounted for the largest share of imports, with a 36,27% portion.

In 2025, LNG imports (including both long-term and spot) amounted to 17.090,59 million Sm³, constituting 29,30% of total imports. Furthermore, of the 41.245,99 million Sm³ of pipeline gas imported in 2025, 6.819,12 million Sm³ consisted of spot pipeline gas imports, raising the share of spot pipeline gas in total imports to 11,69%

- **Exports**

In 2025, BOTAŞ carried out pipeline gas exports to Bulgaria, Syria, and Hungary, as well as LNG exports to North Macedonia and Serbia. Additionally, Tmak Natural Gas Export Trade Limited Company conducted liquefied natural gas (LNG) exports to North Macedonia. In 2025, total exports reached 2.284,35 million Sm³, of which 99,95% was comprised of pipeline gas exports. Natural gas exports increased by 28,48% compared to 2024.

- **Storage**

As of the end of 2025, the licensed underground storage capacity reached 6,3 billion Sm³, while the licensed LNG storage capacity reached 1,05 million m³ of LNG.

- **Consumption**

The national natural gas consumption volume for 2025, which had been estimated at 53.290.468.908 Sm³ pursuant to the Board Decision dated 23.01.2025 and numbered 13232, amounted to 59.072.527.927 Sm³, representing a deviation of 10,85%. Natural gas consumption increased by 10,99% compared to 2024.

In 2025, 721,88 million Sm³ of LNG was consumed directly by consumers without utilizing the national transmission network. The share of this volume in total national natural gas consumption was calculated at 1,22%. Meanwhile, the volume of natural gas sold to end-consumers by compressed natural gas license holders in 2025 amounted to 188,60 million Sm³.

➢ Urban Natural Gas Distribution

As of the end of 2025, the total length of constructed steel pipelines increased by 5,07% year-on-year to approximately 20.097 km, while the length of polyethylene pipelines (excluding service lines) rose by 7,11% to approximately 148.125 km. The combined length of polyethylene pipelines and service lines increased by 7,08% year-on-year, reaching approximately 206.869 km.

As of the end of 2025, the total number of subscribers served by natural gas distribution companies increased by 4.35% year-on-year to 21.950.003 while the number of eligible consumers rose by 4,94% to 848.595.

In 2025, the natural gas consumption of customers with subscriber status served by natural gas distribution license holders increased by 9,95% compared to the previous year, reaching 20.079,29 million Sm^3; meanwhile, the natural gas consumption of customers with eligible consumer status rose by 11,25% year-on-year, amounting to 13.613,99 million Sm^3.

Distribution of the Number of Licenses in the Natural Gas Market by License Type as of 2025

License Type	Number of Licenses	Number of Active Licenses
Import License (Long Term)	19	12
Import (Spot)	74	13*
Transmission License (Pipeline)	1	1
Transmission License (LNG)	18	11
Storage License (LNG)	5	5
Storage License (Underground)	4	2
Wholesale License	44	11
Wholesale License (Production)	10	9
CNG License (Transmission-Distribution)	41	23
CNG License (Sales)	41	37
CNG License (Auto CNG)	6	5
Export License	53	5
Distribution License	73	73
Total	**389**	**207**

**Those who do not engage in import activities but engage in wholesale activities within the scope of their licenses are included.*

2025 GENERAL OVERVIEW OF THE NATURAL GAS MARKET (million Sm³)

Production	Import	Domestic Sales (Consumption)	Export	TOTAL SUPPLY (Production+Import)	TOTAL DEMAND (Domestic Sales+Export)
3.110,97	58.336,57	59.072,53	2.284,35	61.447,54	61.356,88

Natural Gas Volumes Offered for Sale by Production Companies Holding Wholesale License, Disaggregated by Production Province *(million Sm³)*

Province	Volume
ADIYAMAN	0,64
ÇANAKKALE	0,06
DÜZCE	2,10
EDİRNE	6,61
HATAY	0,15
İSTANBUL	43,71
KIRKLARELİ	72,28
MARDİN	1,05
TEKİRDAĞ	171,81
ZONGULDAK	2.812,57
Total	**3.110,97**

Natural Gas Import Quantities by Source Country *(million Sm³)*

2025	Russia	Azerbaijan	USA	Iran	Algeria	Others*	Total
Volume	21.160	11.918	9.473	7.702	4.441	3.642	58.337
Share (%)	*36,27*	*20,43*	*16,24*	*13,20*	*7,61*	*6,24*	*100*

**12 other countries with imports below 1 billion Sm³.*

Volume of Export (million Sm³)

Country to which natural gas is exported	Volume	Share(%)
Pipeline Gas		
Bulgaria	1.787,56	78,25
Hungary	23,05	1,01
Syria	472,54	20,69
LNG		
North Macedonia	1,15	0,05
Serbia	0,05	0,00
Total	**2.284,35**	**100,00**

Year-End Stock Volume (million Sm^3)

	2024		2025	
Storage Volume	Volume	Share(%)	Volume	Share(%)
Underground Storage	4.535,47	91,61	4.845,71	92,92
LNG Terminal	415,39	8,39	368,97	7,08
Total	**4.950,86**	**100**	**5.214,68**	**100**

Natural Gas Consumption by Sector (million Sm^3)

Sector	2024	2025
Conversion/Cycle Sector	13.466,66	16.292,21
Energy Sector	1.411,85	1.507,14
Transportation Sector	140,42	134,36
Industry Sector	13.359,69	13.824,88
Service Sector	5.533,56	5.915,30
Housing	18.941,81	20.857,02
Other Sectors	371,55	541,60
Total	**53.225,55**	**59.072,53**

Natural Gas Market Overview by Year (million Sm^3)

	2020	2021	2022	2023	2024	2025	*Change 2024-2025 (%)*
Import	48.125,51	58.703,93	54.661,67	50.483,77	52.213,12	58.336,57	11,73
Production	441,27	394,44	379,81	807,28	2.259,14	3.110,97	37,71
Export	577,52	382,89	581,43	896,28	1.778,05	2.284,35	28,48
Consumption	48.266,54	59.830,36	53.200,55	50.210,84	53.225,55	59.072,53	10,99
Year-End Stock	2.852,00	1.914,17	5.334,46	5.442,40	4.950,86	5.214,68	5,33

İçindekiler

ANNEX:

Annex Excel File

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TÜRKİYE NATURAL GAS MARKET

The legal framework of the Turkish natural gas market is established by the Natural Gas Market Law No. 4646 (the Law), which designates the following as market activities that require licensing: import, transmission, storage, wholesale, export, distribution, as well as the distribution and transmission of compressed natural gas (CNG). This section presents, under separate subheadings, data and figures pertaining to the production and sale of natural gas, as well as the activities classified as market operations under the Law, and consumption.

1. Production

Natural gas exploration and production activities are carried out under exploration and operating licenses issued by the General Directorate of Mining and Petroleum Affairs (MAPEG) in accordance with the Turkish Petroleum Law No. 6491. Although production is not classified as a market activity under the Natural Gas Market Law, production companies are permitted to market the natural gas they produce—upon obtaining a wholesale license from the Energy Market Regulatory Authority (EMRA)—to wholesale companies, importers, exporters, distribution companies, compressed natural gas (CNG) sales companies (at the wellhead), CNG transmission and distribution companies, or eligible consumers. Furthermore, production companies may also export the natural gas they produce, provided that they obtain an export license.

In this context, the companies that have obtained a wholesale license from the Authority are as follows:

- *Türkiye Petrolleri Anonim Ortaklığı (TPAO)*
- *Thrace Basin Natural Gas (Türkiye) Corporation Türkiye-Ankara Şubesi (THRACE BASIN)*
- *Park Place Energy Turkey Limited-Türkiye Ankara Şubesi (PARK PLACE)*
- *Atlı Makina İnşaat Nakliyat Madencilik Turizm Doğal Enerji Kaynakları Üretim Sanayi Ve Ticaret Anonim Şirketi (ATLI MAKİNA)*
- *Petrogas Petrol Gaz ve Petrokimya Ürünleri İnşaat San. ve Tic. A.Ş. (PETROGAS)*
- *Transatlantic Petroleum Ham Petrol ve Doğal Gaz Arama ve Üretim Anonim Şirketi (TRANSATLANTIC PETROLEUM)*

- *Marsa Turkey B.V. (Merkezi Hollandada) Türkiye Ankara Şubesi (MARSA TURKEY)*
- *Arar Petrol Anonim Şirketi (ARAR PETROL)*
- *Valeura Energy Netherlands (Merkezi Hollanda) B.V.Türkiye Ankara Şubesi (VALEURA)*

In 2025, natural gas produced by these companies was supplied to industrial and commercial enterprises located in the production regions, as well as to distribution companies, importers, wholesale companies, and companies holding licenses for compressed natural gas (CNG) sales at the wellhead.

Total volumes of natural gas produced by wholesale license holders engaged in production are presented on an annual basis in Table 1.1.

Table 1.1: Natural Gas Production Volume (2015-2025) (million Sm^3)

Years	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Volume	381	366	354	428	474	442	394	380	807	2.259	3.111

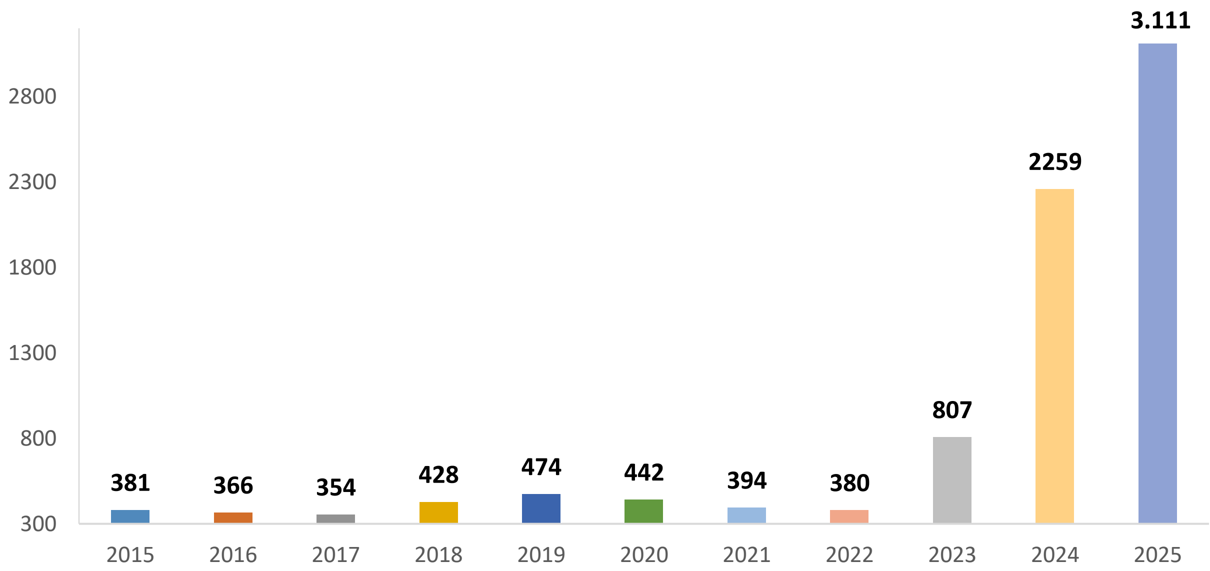

Figure 1.1: Natural Gas Production Volume, (2015-2025) (million Sm^3)

In 2025, the volume of natural gas produced by the aforementioned wholesale license holders increased by 37,71% compared to 2024. The significant rise in production, which began with the introduction of Black Sea gas into the system in September 2023, continued throughout 2025.

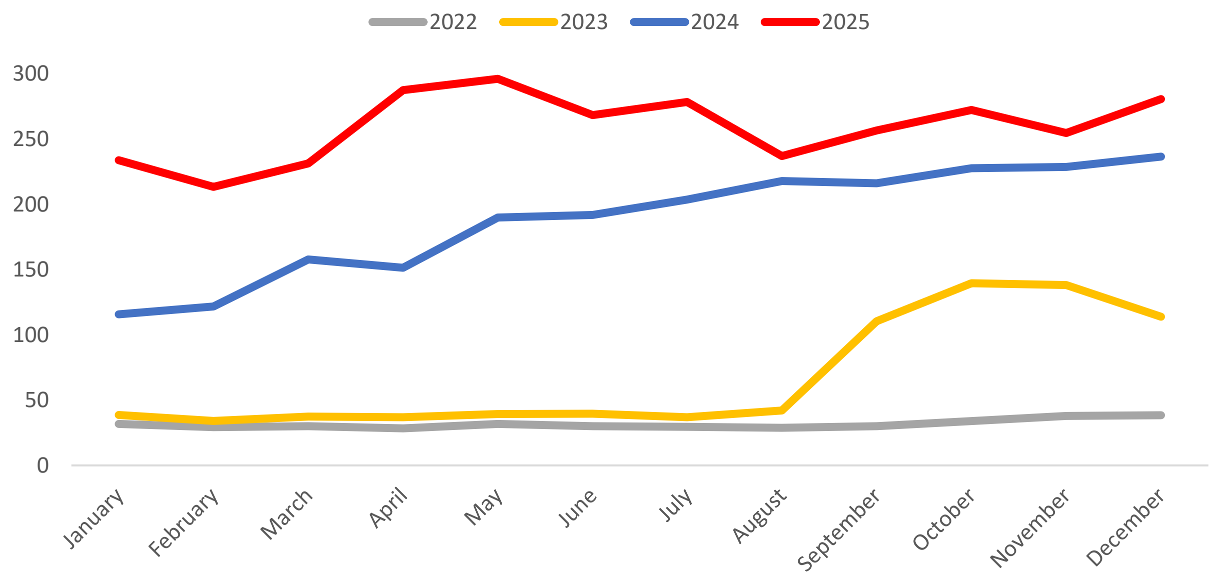

Figure 1.2: Monthly Natural Gas Production Comparison by Year, (2022–2025) (million Sm³)

1.1.Production Volume by Province

In 2025, Türkiye experienced a significant increase in natural gas production, primarily due to the enhanced contribution of the Black Sea Gas, which boosted overall output. Specifically, the Sakarya Gas Field produced and sold 2.812,57 million Sm³ of natural gas during the year. Zonguldak province emerged as the leading producer, accounting for 90,41% of the total production, followed by Tekirdağ with 5,52% and Kırklareli with 2,32%, ranking second and third, respectively. The distribution of production across provinces and months is detailed in Table 1.2.

Table 1.2: Natural Gas Production by Province and Month, 2025 (million Sm³)

Provinces/ Months	January	February	March	April	May	June	July	August	September	October	November	December	Total
ADIYAMAN	0,06	0,07	0,06	0,06	0,03	0,03	0,04	0,05	0,05	0,05	0,06	0,07	0,64
ÇANAKKALE	0,01	0,01	0,00	0,01	0,00	0,00	0,00	0,01	0,01	0,00	0,00	0,00	0,06
DÜZCE	1,62	0,22	0,04	0,04	0,04	0,02	0,03	0,02	0,02	0,02	0,01	0,01	2,10
EDİRNE	0,51	0,44	0,43	0,39	0,36	0,30	0,37	0,32	0,44	0,78	0,65	1,61	6,61
HATAY	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,02	0,02	0,15
İSTANBUL	4,46	3,94	4,07	3,90	3,84	3,55	3,66	3,80	3,39	3,15	2,89	3,06	43,71
KIRKLARELİ	8,95	6,53	6,91	6,63	6,95	5,84	5,86	5,10	4,64	4,50	4,50	5,87	72,28
MARDİN	0,13	0,13	0,08	0,18	0,16	0,09	0,07	0,05	0,05	0,04	0,03	0,04	1,05
TEKİRDAĞ	16,05	17,31	17,50	16,15	16,01	12,86	13,34	12,81	13,08	12,29	11,71	12,71	171,81
ZONGULDAK	201,95	184,78	202,39	260,14	268,82	245,83	255,15	214,97	235,00	251,53	234,71	257,30	2.812,57
Total	**233,75**	**213,44**	**231,50**	**287,50**	**296,22**	**268,54**	**278,55**	**237,14**	**256,68**	**272,38**	**254,59**	**280,70**	**3.110,97**

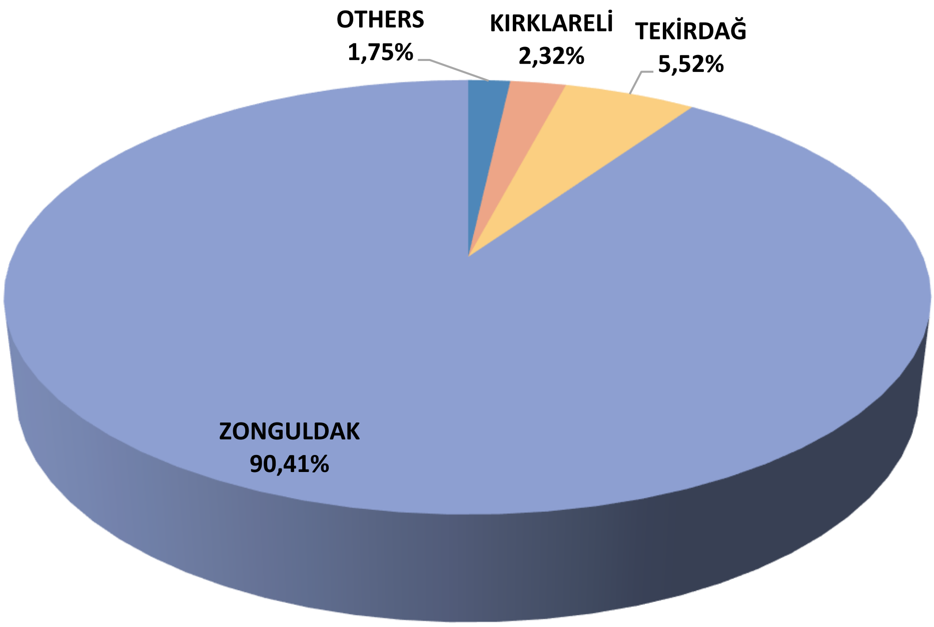

Figure 1.3: Natural Gas Production Shares by Province, 2025 (%)

1.2. Production Volume by Company

In 2025, wholesale license holders with production activities realized a total production of 3.110,97 million Sm³ of natural gas, with a significant portion of this volume attributed to TPAO. The production volumes and respective shares of these companies are presented in Table 1.3 and Figure 1.4.

Table 1.3: Monthly Natural Gas Production Volumes of Wholesale License Holders with Production Activities, 2025 (million Sm³)

Companies/ Months	January	February	March	April	May	June	July	August	September	October	November	December	Total
TPAO	226,21	207,21	225,03	281,00	289,71	262,74	272,24	231,32	251,07	267,22	249,61	275,30	3.038,66
THRACE BASIN	5,44	4,65	4,95	4,92	5,00	4,53	4,88	4,51	4,36	4,36	4,17	4,40	56,17
PETROGAS	0,74	0,71	0,80	0,74	0,75	0,64	0,71	0,68	0,66	0,70	0,71	0,75	8,60
ATLI MAKİNA	0,41	0,61	0,59	0,62	0,56	0,50	0,60	0,53	0,49	0,00	0,00	0,00	4,90
TRANSATLANTIC PETROLEUM	0,14	0,14	0,10	0,19	0,17	0,10	0,08	0,07	0,06	0,06	0,05	0,06	1,21
PARK PLACE	0,79	0,11	0,02	0,02	0,02	0,01	0,02	0,01	0,01	0,01	0,00	0,01	1,03
VALEURA	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,01	0,02	0,16	0,19
ARAR PETROL	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,02	0,02	0,15
MARSA TURKEY	0,01	0,01	0,00	0,01	0,00	0,00	0,00	0,01	0,01	0,00	0,00	0,00	0,06
Total	**233,75**	**213,44**	**231,50**	**287,50**	**296,22**	**268,54**	**278,55**	**237,14**	**256,68**	**272,38**	**254,59**	**280,70**	**3.110,97**

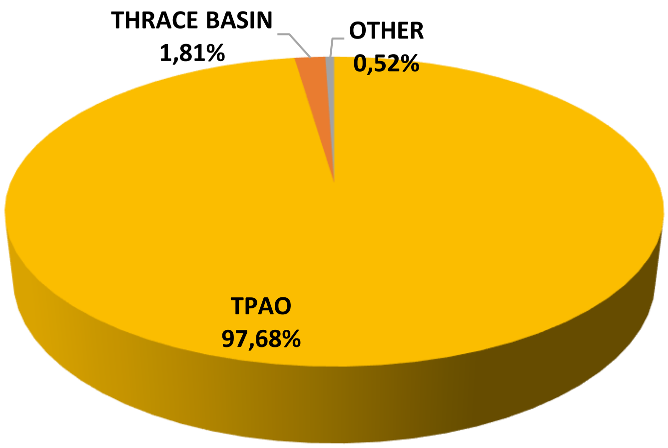

Figure 1.4: Natural Gas Production Shares of Wholesale License Holders (%), 2025

In 2025, in addition to the 3.110,97 million Sm³ of natural gas they produced, the aforementioned companies purchased 2,46 million Sm³ of natural gas from one another, resulting in a total natural gas sales volume of 3.113,43 million Sm³. Of this volume, 6,09% was sold directly to final consumers. The distribution of customer types to whom the wholesale license holder companies engaged in production sold natural gas is presented in Figure 1.5.

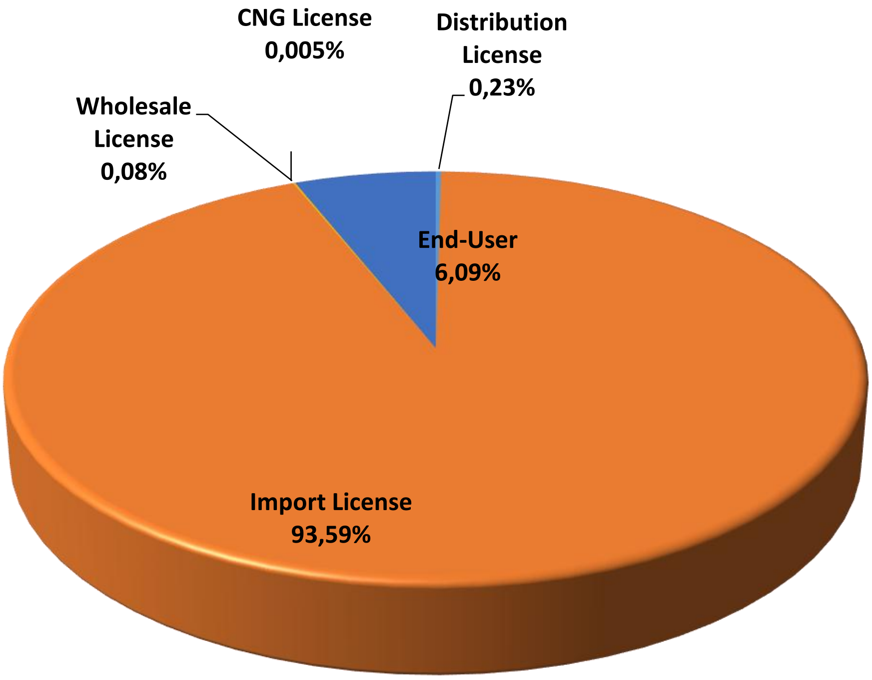

Figure 1.5:Customer Share Distribution of Wholesale License Holder Companies Engaged in Production(%), 2025

2. International Natural Gas Trade

2.1 Imports

2.1.1 Pipeline Imports

Currently, natural gas is imported via pipelines into our country under long-term natural gas purchase agreements with three different countries.

2.1.2 Liquefied Natural Gas (LNG) Imports

When it is technically or economically unfeasible to transmit natural gas via pipelines, the gas is liquefied by cooling it to temperatures as low as -162°C, reducing its volume by up to 600 times, and transported in specially designed tankers as Liquefied Natural Gas (LNG).

In 2025, LNG imports under long-term purchase agreements were carried out by BOTAŞ from Algeria and Oman. LNG imports from other countries, on the other hand, were conducted under import (spot) licenses.

2.1.3 Spot Imports

In order to ensure that the annual, quarterly, and monthly capacities allocated for spot pipeline gas imports are distributed among interested parties under equal and objective conditions, the daily quantity of gas that can be imported on a spot basis is calculated based on the Maximum Allocable Capacity data submitted by the transmission company for each import entry point, in accordance with the Procedures and Principles on Determining the Spot Pipeline Gas Import Volume and Implementation Method. These calculated quantities are then announced by our Authority through Demand Calls.

To reserve the capacity allocated for spot pipeline gas imports as specified in the Demand Call calendar and procedure, Demand Collection/Competitive Bidding processes are conducted on an electronic platform established and operated by our Authority.

Within this framework, information regarding the Demand Calls announced for the 2025 gas year and their final outcomes, as per the Procedures and Principles on Determining the Spot Pipeline Gas Import Volume and Implementation Method, is provided below.

Table 2.1: Capacities Awarded for Reservation Under Spot Pipeline Gas Imports in the 2025 Gas Year

Annual Product (m³/day)	Quarterly Product (m³/day)	Monthly Product (m³/day)
Türkgözü / BOTAŞ / 200.000	Kıyıköy/ Q1/ BOTAŞ/ 13.064.000	Kıyıköy / January / BOTAŞ / 7.839.000
Kıyıköy / BOTAŞ / 5.226.000	Türkgözü/ Q1/ SOCAR / 983.000	Türkgözü / January / SOCAR / 1.863.000
Remaining Part of the Year (RPY) (m³/day)	Kıyıköy / Q2 / BOTAŞ / 13.064.000	Kıyıköy / February / BOTAŞ / 7.839.000
Gürbulak / YGK / BOTAŞ / 3.880.000	Türkgözü/ Q2/ SOCAR / 984.000	Kıyıköy / February / Bosphorus / 2.993.000
	Gürbulak /Q2 / BOTAŞ / 1.108.000	Kıyıköy / March / BOTAŞ / 10.832.000
	Kıyıköy/ Q3 /BOTAŞ 13.064.000	Gürbulak / March / BOTAŞ / 1.661.000
	Türkgözü/ Q3/ SOCAR / 984.000	Kıyıköy / April / BOTAŞ / 10.832.000
	Gürbulak /Q3 / BOTAŞ / 1.108.000	Gürbulak / April / BOTAŞ / 553.000
	Kıyıköy/ Q4 /BOTAŞ 13.064.000	Kıyıköy / May / BOTAŞ / 10.832.000
	Türkgözü/ Q4/ SOCAR / 984.000	Türkgözü / May / SOCAR / 507.000
	Gürbulak /Q4 / BOTAŞ / 1.108.000	Gürbulak / May / BOTAŞ / 553.000
		Kıyıköy / June / BOTAŞ / 10.832.000
		Türkgözü / June / SOCAR / 507.000
		Gürbulak / June / BOTAŞ / 553.000
		Kıyıköy / July/ BOTAŞ / 10.832.000
		Türkgözü / July / SOCAR / 507.000
		Gürbulak / July / BOTAŞ / 553.000
		Kıyıköy / August / BOTAŞ / 10.832.000
		Kıyıköy/ September / BOTAŞ / 10.832.000
		Gürbulak / September / BOTAŞ / 553.000
		Kıyıköy / October/ BOTAŞ / 10.832.000
		Gürbulak / October / BOTAŞ / 553.000
		Türkgözü / October / SOCAR / 507.000
		Kıyıköy / November/ BOTAŞ / 10.832.000
		Gürbulak / November / BOTAŞ / 553.000
		Kıyıköy / December/ BOTAŞ / 10.832.000
		Gürbulak / December / BOTAŞ / 553.000

2.1.4 Natural Gas Import Data

The import volumes by source country for the period between 2020 and 2025 are presented in Table 2.2.

Table 2.2: Natural Gas Import Volumes by Source Country (2020–2025) (million Sm³)

Country	2020	2021	2022	2023	2024	2025	
Volume							Share (%)
USA	2.977	4.740	5.642	4.011	5.587	9.473	*16,24*
Angola	95	-	96	-	-	201	*0,34*
Azerbaijan	11.548	8.820	8.705	10.257	11.478	11.918	*20,43*
Belgium	-	-	-	103	-	-	-
Brazil	-	-	-	186	-	81	*0,14*
Algeria	5.573	5.987	5.261	5.988	5.380	4.441	*7,61*
Equatorial Guinea	182	-	90	-	208	505	*0,87*
Indonesia	-	-	88	-	-	-	-
France	131	-	195	696	198	-	-
Iran	5.321	9.434	9.405	5.405	7.043	7.702	*13,20*
Spain	83	106	-	-	97	-	-
Cameroon	97	-	-	-	103	384	*0,66*
Qatar	3.248	299	86	-	-	-	-
Egypt	92	1.351	2.231	1.319	181	191	*0,33*
Mauritania	-	-	-	-	-	106	*0,18*
Mozambique	-	-	-	105	-	74	*0,13*
Nigeria	1.881	1.430	818	469	95	874	*1,50*
Norway	86	-	-	276	86	-	-
Russian Federation	16.178	26.343	21.575	21.340	21.572	21.160	*36,27*
Senegal	-	-	-	-	-	205	*0,35*
Trinidad and Tobago	634	195	364	237	185	465	*0,80*
Turkmenistan	-	-	-	-	-	465	*0,80*
Oman	-	-	107	92	-	90	*0,15*
Total	**48.126**	**58.704**	**54.662**	**50.484**	**52.213**	**58.337**	***100,00***

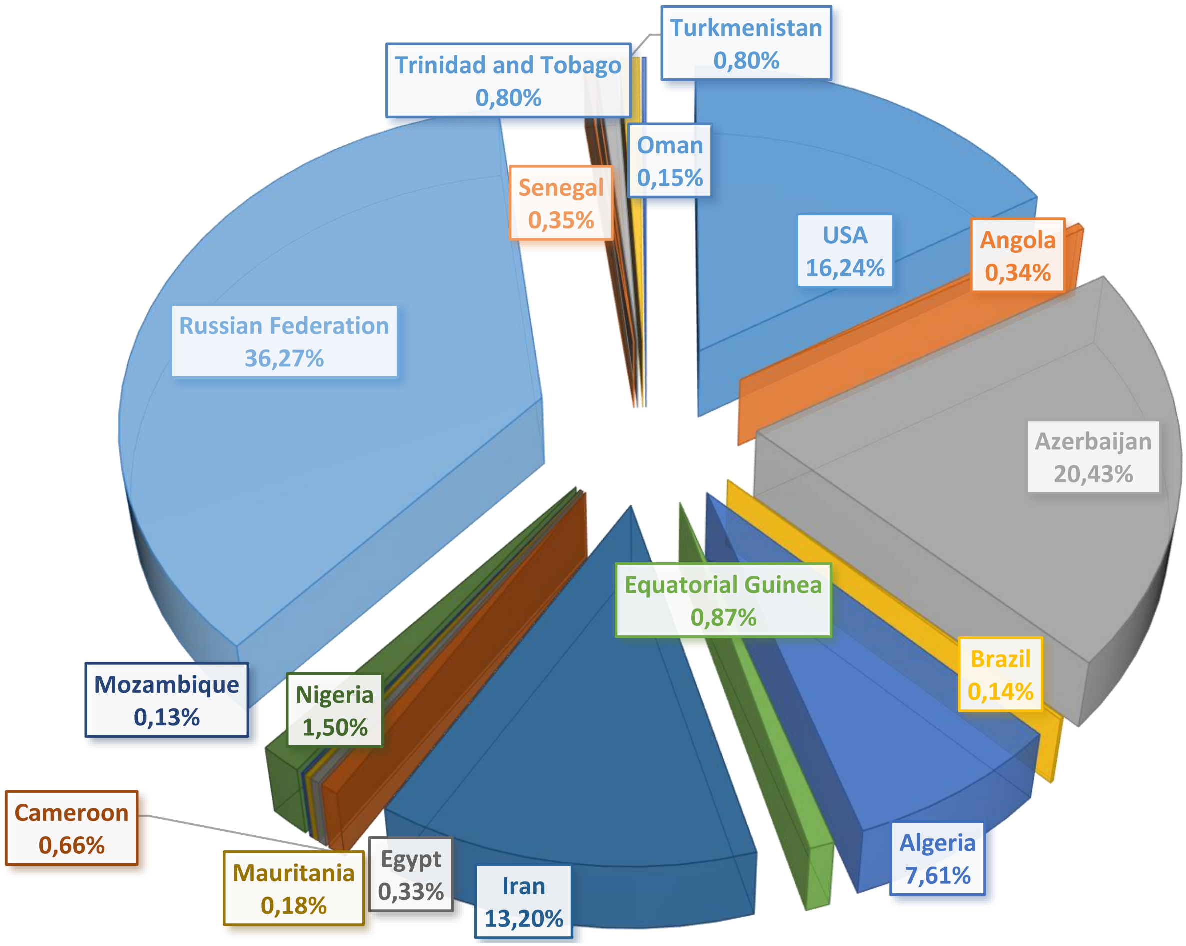

Figure 2.1: Türkiye's Natural Gas Imports by Source Country, 2025 (%)

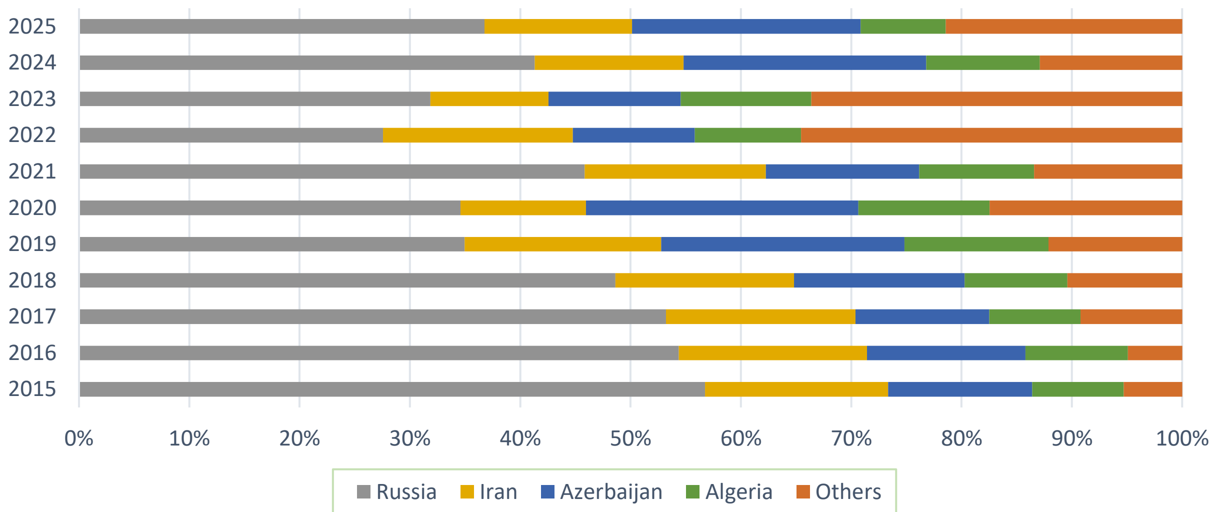

Figure 2.2: Change in Import Shares by Source (2015–2025) (%)

The import volume of companies engaged in natural gas imports between 2015 and 2025, categorized by the type of natural gas, are presented in Table 2.3. In 2025, the volume of pipeline gas imported decreased compared to 2024, whereas the share of LNG imports in the total import volume increased.

Table 2.3: Natural Gas Imports by Type (2015–2025) (million Sm³) and Shares (%)

GAS TYPE	Pipeline Gas		LNG		TOTAL
Years	**Volume**	**Share (%)**	**Volume**	**Share (%)**	**Volume**
2015	40.778,11	84,21	7.648,96	15,79	48.427,08
2016	38.724,48	83,54	7.627,68	16,46	46.352,17
2017	44.484,67	80,52	10.765,28	19,48	55.249,95
2018	39.032,13	77,63	11.249,92	22,37	50.282,05
2019	32.517,40	71,92	12.694,07	28,08	45.211,47
2020	33.047,16	68,67	15.078,35	31,33	48.125,51
2021	44.596,57	75,97	14.107,36	24,03	58.703,93
2022	39.490,98	72,25	15.170,69	27,75	54.661,67
2023	36.213,12	71,73	14.270,65	28,27	50.483,77
2024	39.596,83	75,84	12.616,30	24,16	52.213,12
2025	41.245,99	70,70	17.090,59	29,30	58.336,57

Natural gas import volumes by company for the year 2025 are presented in Table 2.4. BOTAŞ accounted for 95,65% of total natural gas imports (pipeline gas and LNG combined) in 2025.

Table 2.4: Natural Gas Imports by Company, 2025 (million Sm³)

Company Name	**Total Volume**	**Share (%)**
BOTAŞ BORU HATLARI İLE PETROL TAŞIMA ANONİM ŞİRKETİ	**55.796,99**	95,65
BOSPHORUS GAZ CORPORATİON ANONİM ŞİRKETİ	**1.091,21**	1,87
AKFEL GAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	**617,45**	1,06
KİBAR ENERJİ ANONİM ŞİRKETİ	**436,48**	0,75
SOCAR ENERJİ TİCARET ANONİM ŞİRKETİ	**200,15**	0,34
EGE GAZ ANONİM ŞİRKETİ	**194,30**	0,33
Total	**58.336,57**	**100,00**

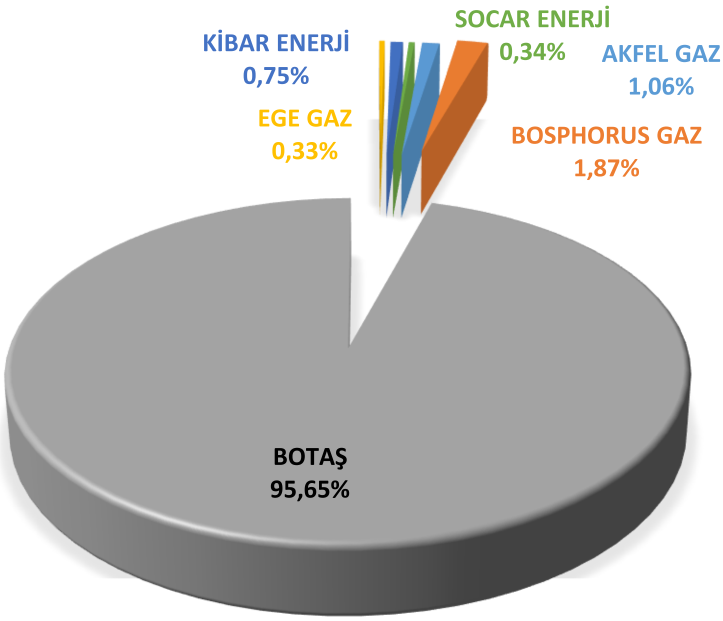

Figure 2.3: Share of Companies in Natural Gas Import, 2025 (%)

The comparison of import volume conducted in 2025 based on the entry points to the national grid is presented in Table 2.5.

Table 2.5: Comparison of Natural Gas Imports by Network Entry Points, 2025 (million Sm³)

Entry Point	Volume of Imported Natural Gas	Share (%)
DURUSU GİRİŞ NOKTASI	13.602,05	23,32
GÜRBULAK GİRİŞ NOKTASI	8.167,45	14,00
KIYIKÖY GİRİŞ NOKTASI	7.558,21	12,96
MARMARA EREĞLİSİ LNG TERMİNALİ	6.444,47	11,05
TÜRKGÖZÜ GİRİŞ NOKTASI	6.019,86	10,32
TANAP SEYİTGAZİ	5.898,42	10,11
EGEGAZ ALİAĞA LNG TERMİNALİ	3.141,90	5,39
DÖRTYOL FSRU TERMİNALİ	3.093,72	5,30
ETKİ LNG TERMİNALİ	2.750,63	4,72
SAROS FSRU TERMİNALİ	1.659,86	2,85
Total	**58.336,57**	**100**

In 2025, natural gas imports increased by 11,73% compared to 2024. The data are presented on a monthly comparative basis in Table 2.6 and Figure 2.4.

Table 2.6: Monthly Comparison of Natural Gas Imports (2017–2025) (million Sm³)

	2017	2018	2019	2020	2021	2022	2023	2024	2025
January	5.914,34	6.216,51	5.810,12	5.988,78	6.093,91	6.704,88	6.048,23	6.693,46	6.518,04
February	5.252,73	5.403,56	4.275,92	5.261,40	6.002,62	6.272,55	6.011,56	5.515,06	6.521,49
March	5.081,27	4.725,37	4.296,13	3.940,99	5.827,25	6.215,38	4.557,77	4.411,97	5.997,99
April	4.250,26	3.670,11	3.550,34	2.633,97	4.725,19	4.067,46	3.982,20	2.395,25	4.060,94
May	3.727,77	3.008,82	2.681,12	2.667,41	3.599,51	3.729,52	3.692,27	2.882,34	3.539,11
June	3.609,89	2.928,63	2.677,71	1.990,91	4.065,34	3.836,03	2.332,42	2.314,93	3.261,68
July	4.135,45	3.635,41	3.257,54	3.109,89	4.047,49	3.411,44	3.030,96	3.607,42	3.912,89
August	4.015,73	3.034,61	3.148,09	3.354,75	4.170,64	3.852,87	3.681,35	3.892,53	4.121,72
September	3.680,77	3.281,47	3.038,46	3.723,07	4.281,48	3.401,37	3.291,83	3.377,51	3.605,42
October	4.137,10	3.629,31	3.158,89	4.041,28	4.657,29	3.238,19	3.358,23	3.952,22	4.104,81
November	5.448,85	4.695,69	3.900,97	5.153,04	5.048,95	4.123,14	4.433,83	5.806,26	5.038,23
December	5.995,79	6.052,56	5.416,19	6.260,00	6.184,26	5.808,85	6.063,12	7.364,17	7.654,24
Total	**55.249,95**	**50.282,05**	**45.211,47**	**48.125,51**	**58.703,93**	**54.661,67**	**50.483,77**	**52.213,12**	**58.336,57**

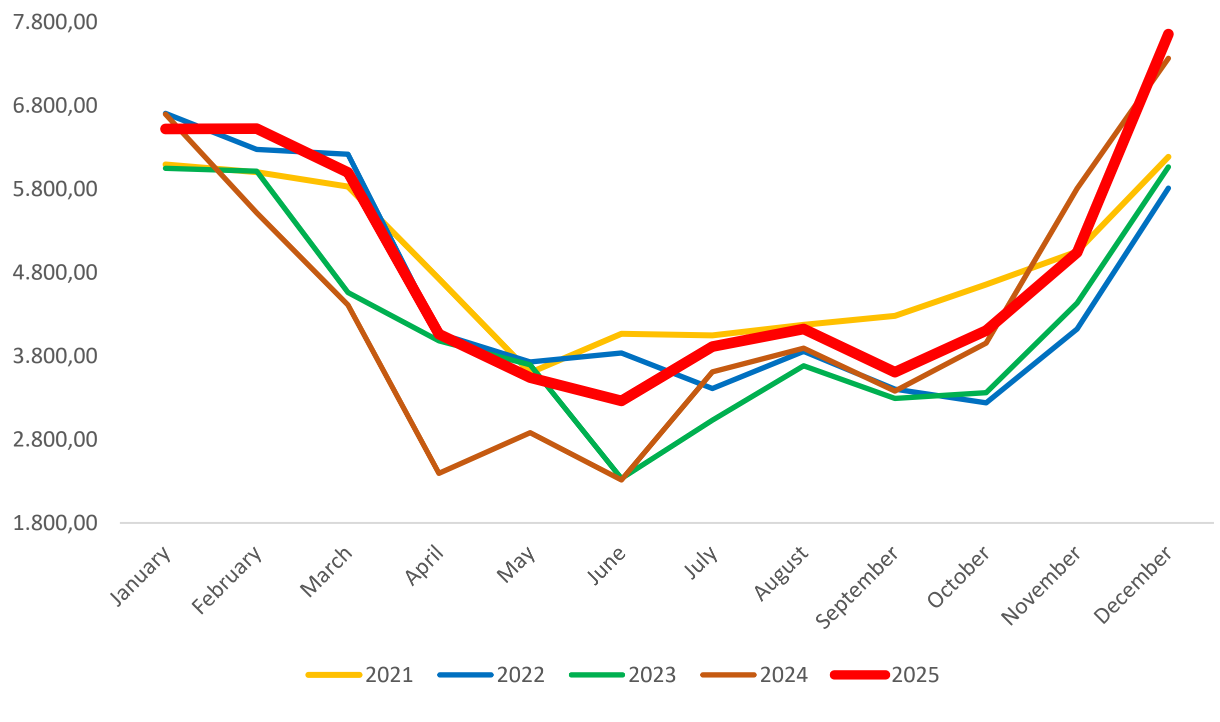

Figure 2.4: Monthly Import Volume Comparison (2021–2025) (million Sm³)

As shown in Figure 2.5, total LNG imports (long-term and spot) amounted to 17.090,59 million Sm³ in 2025, accounting for 29,30% of total natural gas imports.

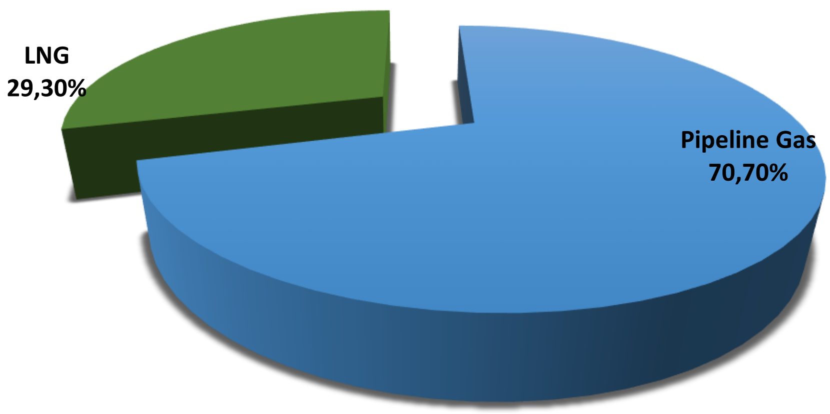

Figure 2.5: Shares of Pipeline Gas and LNG in Total Imports, 2025 (%)

In 2025, 66,78% of natural gas imports were carried out under long-term import licenses, while the remaining 33,22% were realized on a spot basis.

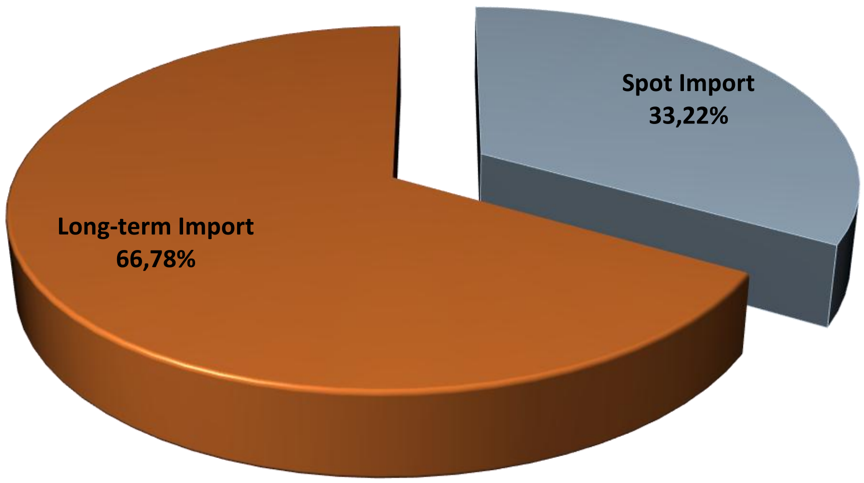

Figure 2.6: Shares of Long-Term and Spot Imports in Total Natural Gas Imports (%), 2025

In 2025, natural gas imports under long-term agreements were carried out from Russia, Iran, Azerbaijan, Algeria, and Oman. As shown in Figure 2.7, the companies holding long-term import licenses predominantly imported natural gas from Russia, followed by Azerbaijan.

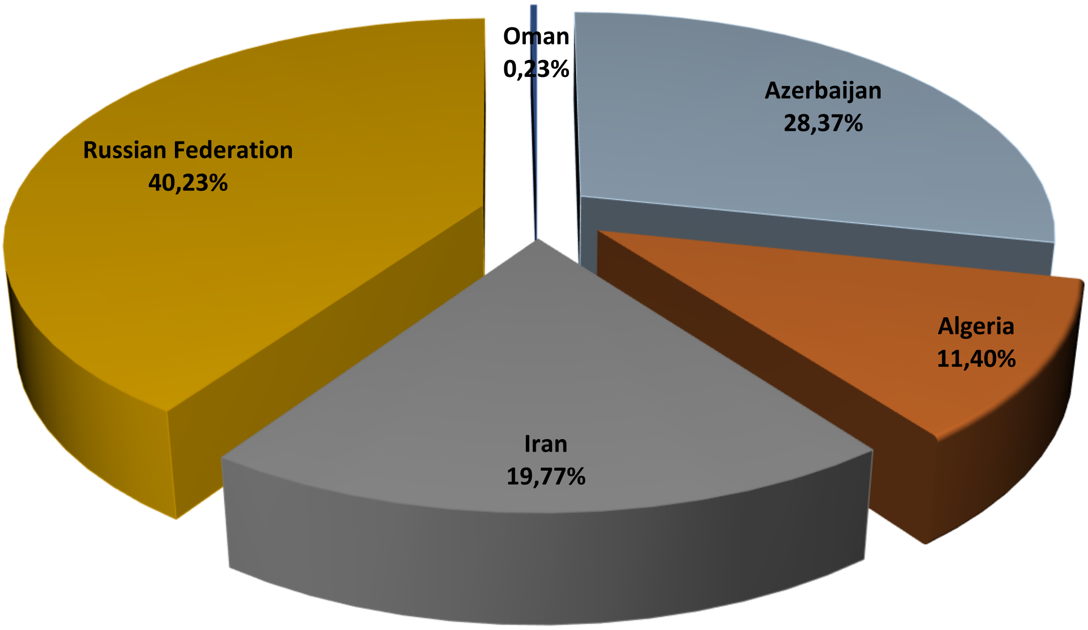

Figure 2.7: Distribution of Import Volumes by Country of Origin for Long-Term License Holders, 2025 (%)

As indicated in Table 2.7, a total of 19.378,29 million Sm³ of spot imports were realized in 2025, comprising 6.819,12 million Sm³ of pipeline gas and 12.559,17 million Sm³ of LNG.

Table 2.7: Monthly Data of Long-Term and Spot Imports, 2025 (million Sm³)

	Spot Pipeline Gas	Spot LNG	**Spot Total**	Pipeline Gas (Long-term)	LNG (Long-term)	**Long-term Total**	**Total Imports**
January	531,38	2.237,91	**2.769,29**	3.234,34	514,41	**3.748,75**	**6.518,04**
February	544,18	2.726,83	**3.271,01**	2.826,28	424,21	**3.250,48**	**6.521,49**
March	547,88	1.958,59	**2.506,47**	2.848,87	642,64	**3.491,52**	**5.997,99**
April	661,99	99,97	**761,96**	2.994,31	304,68	**3.298,98**	**4.060,94**
May	708,72	96,01	**804,73**	2.452,58	281,80	**2.734,38**	**3.539,11**
June	503,08	192,98	**696,06**	2.287,67	277,95	**2.565,62**	**3.261,68**
July	543,81	-	**543,81**	3.089,95	279,13	**3.369,08**	**3.912,89**
August	750,43	100,48	**850,91**	2.972,09	298,73	**3.270,81**	**4.121,72**
September	594,12	95,95	**690,07**	2.618,66	296,69	**2.915,35**	**3.605,42**
October	536,46	295,86	**832,32**	2.908,94	363,55	**3.272,49**	**4.104,81**
November	304,11	1.540,66	**1.844,77**	2.825,67	367,79	**3.193,45**	**5.038,23**
December	592,95	3.213,94	**3.806,88**	3.367,50	479,86	**3.847,36**	**7.654,24**
Total	6.819,12	12.559,17	**19.378,29**	34.426,87	4.531,42	**38.958,28**	**58.336,57**

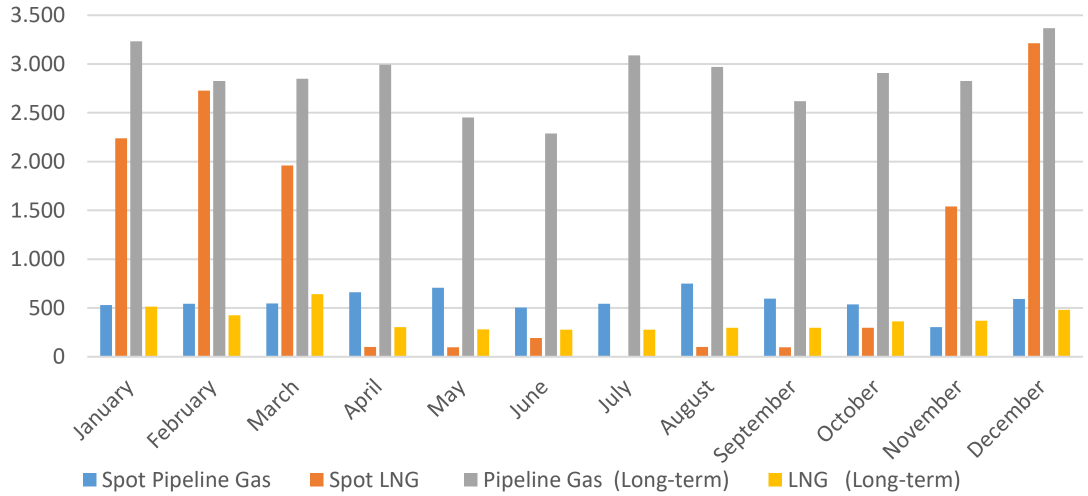

Figure 2.8: Monthly Comparison of Long-Term and Spot LNG Imports, 2025 (Million Sm³)

In 2025, LNG imports were carried out from Algeria and Oman under long-term contracts. Meanwhile, spot pipeline gas imports were conducted via the Gürbulak, Kıyıköy, and Türkgözü entry points. The shares of spot pipeline gas and spot LNG in total spot imports are illustrated in Figure 2.9.

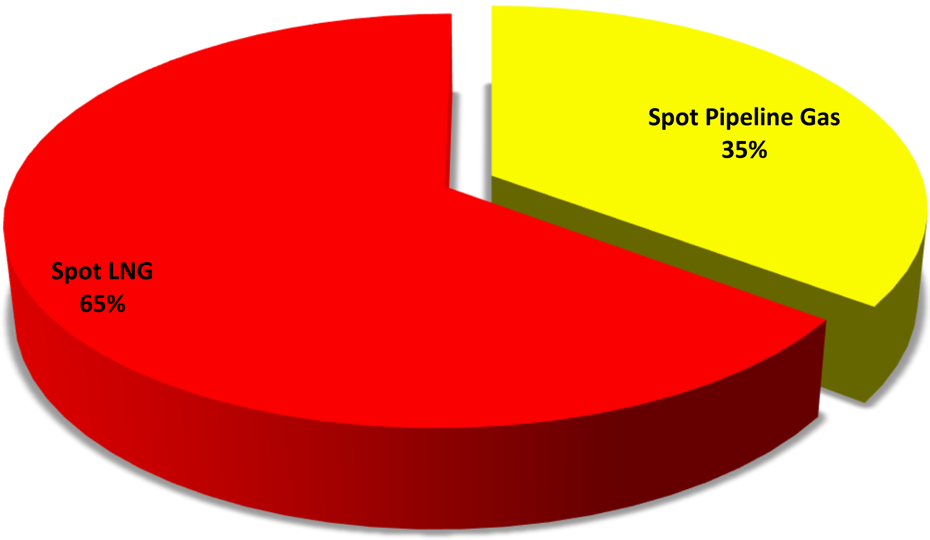

Figure 2.9: Distribution of Import Volumes of Spot Import License Holders by Gas Type, 2025 (%)

In 2025, spot pipeline gas imports were carried out from Russia, Azerbaijan, and Turkmenistan. The breakdown of spot pipeline gas imports by country of origin is provided in Table 2.8.

Table 2.8: Spot Pipeline Gas Volumes by Year (2020–2025) (million Sm³)

Country	Russia		Azerbaijan		Turkmenistan		Total
Years	Volume	Share (%)	Volume	Share (%)	Volume	Share (%)	Volume
2020	12,04	100,00	-	-	-	-	12,04
2021	-	-	834,46	100,00	-	-	834,46
2022	6.321,57	70,39	2.659,02	29,61	-	-	8.980,60
2023	4.470,75	51,49	4.211,34	48,51	-	-	8.682,09
2024	5.652,30	50,99	5.432,55	49,01	-	-	11.084,86
2025	5.488,41	80,49	865,31	12,69	465,41	6,83	6.819,12

In 2025, spot pipeline gas imports accounted for 11.69% of total natural gas imports. In terms of supplier countries, spot pipeline gas imports from Turkmenistan were carried out by BOTAŞ, those from Russia by BOTAŞ and Bosphorus Gaz, and those from Azerbaijan by BOTAŞ and SOCAR Energy.

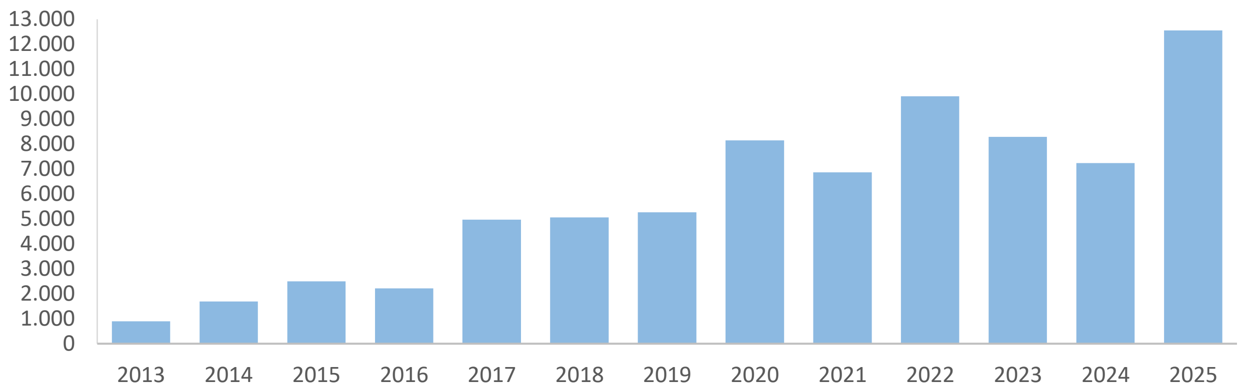

Figure 2.10: Annual Change in Spot LNG Imports, (2013–2025) (million Sm^3)

In 2025, spot LNG imports accounted for 21,53% of total natural gas imports and were supplied from 11 different countries. The United States had the largest share with 75%, followed by Nigeria with 7%. Table 2.9 and Figure 2.11 provide further details on these figures.

Table 2.9: Spot LNG Imports, 2025 (million Sm^3)

Country	Volume
United States	9.472,96
Angola	201,15
Brazil	81,08
Equatorial Guinea	505,01
Cameroon	384,40
Egypt	190,91
Mauritania	105,50
Mozambique	74,15
Nigeria	874,06
Senegal	204,88
Trinidad and Tobago	465,07
Total	**12.559,17**

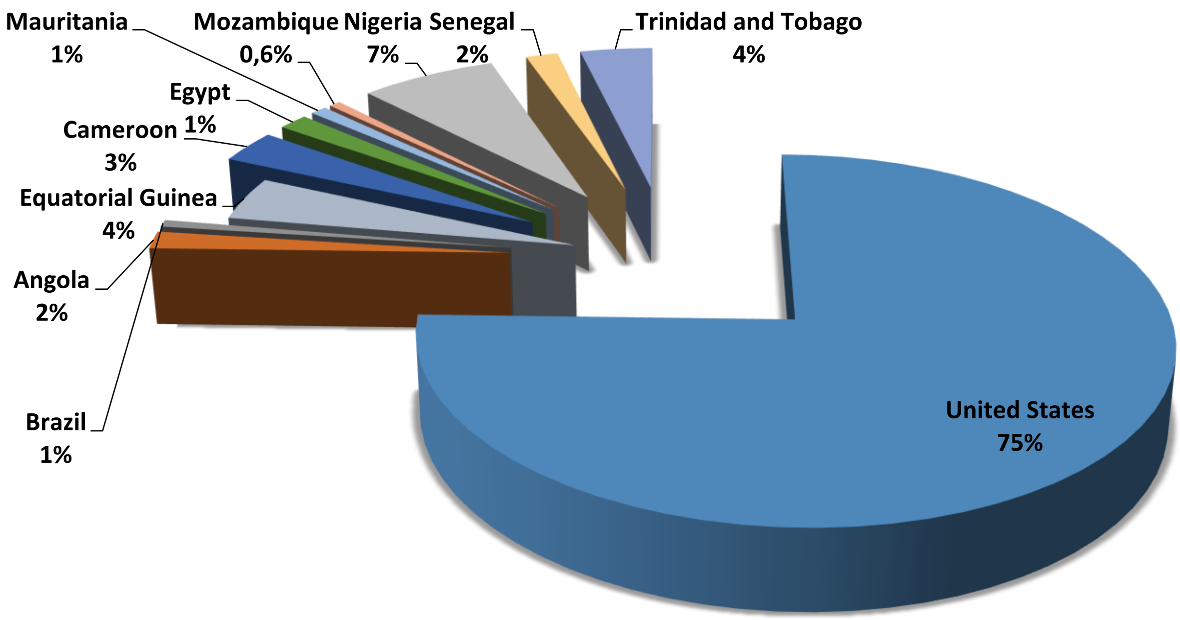

Figure 2.11: Distribution of Spot LNG Imports by Country, 2025 (%)

As of the end of 2025, there were 74 companies holding spot import licenses. Among these, only BOTAŞ and Ege Gaz conducted spot LNG imports, while spot pipeline gas imports were carried out by BOTAŞ, SOCAR Energy, and Bosphorus Gaz. Of the remaining 70 companies, 9 were engaged in wholesale trading of gas procured domestically, while the other 61 did not operate within the scope of their licenses during 2025.

2.2 Production - Import Evaluation

In 2025, the amount of natural gas produced and made available for sale by wholesale license-holding production companies amounted to 3.110,97 million Sm³. This gas is extracted from underground reserves, processed and purified, and then transported to transmission lines via gathering lines or delivered directly to consumers through direct lines. The significant increase in this volume compared to the previous year is largely attributed to the Black Sea gas, which has been supplied to the system since September 2023. The ever-increasing demand for natural gas in the country, coupled with insufficient domestic reserves and production capacity to meet this demand, necessitated natural gas imports in 2025 as well. As shown in Figure 2.12, 5,06% of Türkiye's total natural gas supply was met by domestically produced gas, while the remaining 94,94% was supplied through imports carried out by import license-holding companies from various sources.

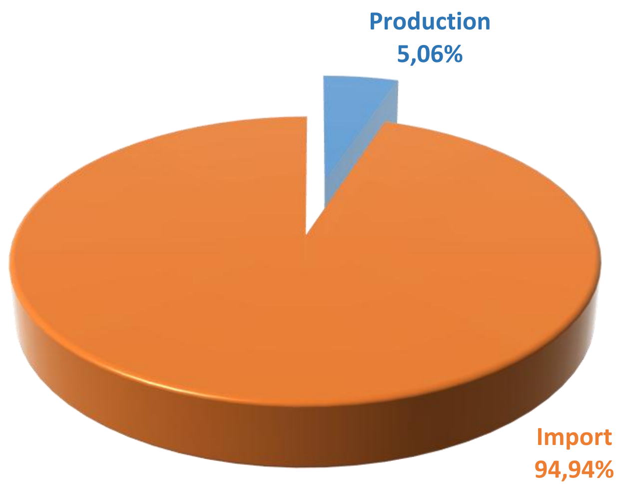

Figure 2.12: 2025 Shares of Sources of Total Natural Gas Supply (%)

2.3 Export

The export of natural gas, whether imported or produced domestically, may be carried out by legal entities holding an export license, provided that it is conducted within the scope of the countries specified in their licenses.

Table 2.10: Export Volumes (2016–2025) (million Sm³)

Years	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Volume	674,68	630,67	673,29	762,68	577,52	382,89	581,43	896,28	1.778,05	2.284,35

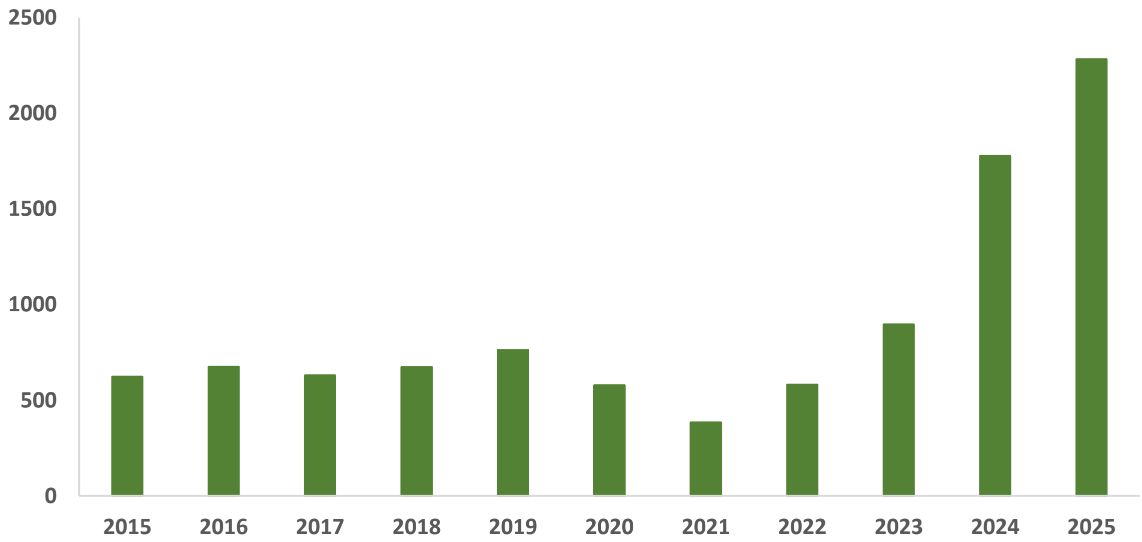

Figure 2.13: Natural Gas Exports by Years (million Sm³)

Table 2.11: Monthly Distribution of Exported Natural Gas by Years (2017-2025) (million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December	Total
2017	85,7	34,2	-	61,6	30	55,5	70,4	58,8	58	45,4	69,4	61,8	**630,7**
2018	51,6	31,8	29,2	65	60,9	25,9	60	66,7	63,4	54,2	57,9	106,7	**673,3**
2019	103,9	27,1	-	86,1	76,2	84,6	63,5	63,4	47,7	71	34,6	104,6	**762,7**
2020	97,2	15,3	49,4	3,6	5,6	32,0	66,5	56,0	63,8	58,6	70,3	59,3	**577,5**
2021	39,3	24,2	26,0	44,1	29,5	55,0	52,0	0,6	22,5	55,6	11,5	22,5	**382,9**
2022	0,0	13,8	30,5	0,0	6,9	221,4	30,5	29,0	118,2	81,2	29,5	20,4	**581,4**
2023	6,4	18,9	21,9	38,4	7,5	17,3	22,0	44,7	196,3	249,6	176,3	97,0	**896,3**
2024	151,8	122,9	77,4	118,9	122,9	228,0	168,5	189,8	181,6	136,1	158,0	122,1	**1.778,05**
2025	148,9	179,8	173,7	146,0	156,8	145,5	165,3	202,4	232,4	252,3	240,8	240,4	**2.284,4**

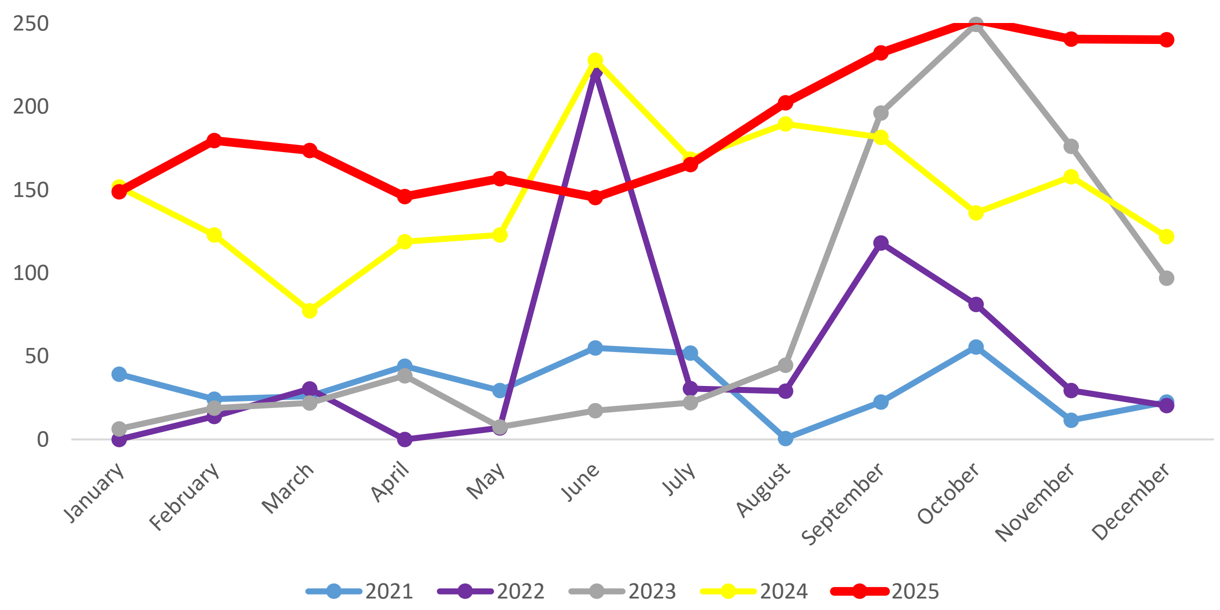

Figure 2.14: Comparative Monthly Export Volumes of Natural Gas (2021–2025) (million Sm³)

In 2025, under the scope of export licenses, BOTAŞ carried out both LNG and pipeline gas exports, while Tmak Natural Gas İhracat Ticaret Limited Şirketi conducted LNG exports. The distribution of the total exported natural gas volume of 2.284,35 million Sm³ by these companies across destination countries is presented in Table 2.12.

Table 2.12: Natural Gas Export Volumes by Country and Type, 2025 (million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Pipeline Gas													
Bulgaria	148,87	179,77	173,67	145,93	156,66	145,32	142,10	142,72	131,54	146,79	138,68	135,52	1.787,56
Hungary							23,05						23,05
Syria								59,56	100,69	105,40	102,00	104,88	472,54
LNG													
North Macedonia	0,05	0,00	0,00	0,09	0,12	0,18	0,12	0,12	0,15	0,15	0,12	0,03	1,15
Serbia									0,05				0,05
Total	**148,92**	**179,77**	**173,67**	**146,02**	**156,78**	**145,50**	**165,27**	**202,40**	**232,43**	**252,34**	**240,81**	**240,44**	**2.284,35**

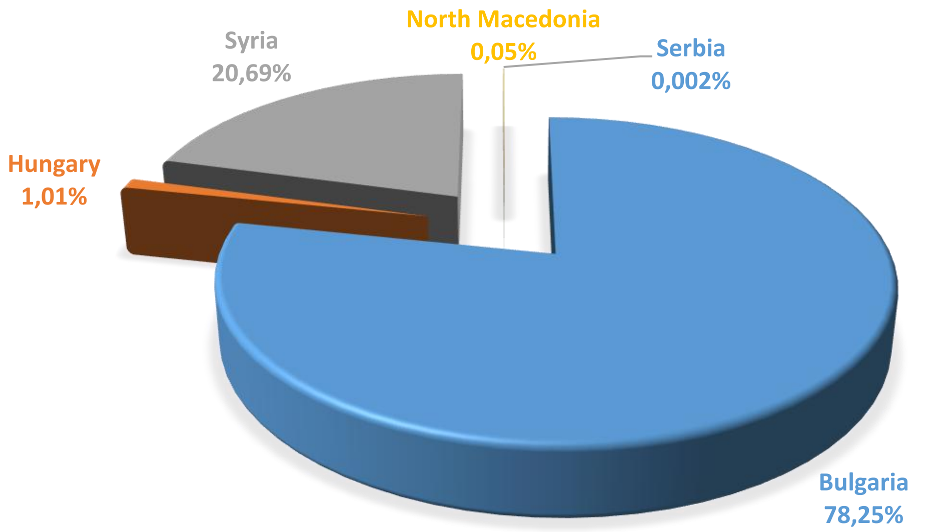

Figure 2.15: Distribution of Export Volume by Exporting Countries for Licensed Companies, 2025 (%)

3. Storage

As a result of investments made in the storage segment of the natural gas market, significant increases have been observed in both underground storage capacity and LNG terminal capacity. In parallel with this development, as shown in Table 3.1, stock levels have increased substantially over the years. As of the end of 2025, the total capacity of underground natural gas storage facilities has reached 6,3 billion Sm³. The LNG storage capacity of LNG terminals has reached 1,05 million m³. The monthly total stock volume of existing storage facilities (with LNG terminal stocks converted into natural gas in million Sm³) are presented in the table below.

Table 3.1: End-of-Month Natural Gas Stock Volume by Year (million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December
2014	1.137,03	771,25	760,34	1.197,15	1.586,83	1.796,99	2.023,92	2.383,78	2.611,47	2.566,16	2.346,69	1.873,08
2015	1.324,09	1.019,49	599,13	249,76	644,68	927,09	1.306,61	1.597,04	2.181,86	2.377,36	2.661,03	2.126,76
2016	1.708,55	1.274,30	884,75	1.191,85	1.485,92	1.787,80	2.125,45	2.484,97	2.773,51	2.820,56	2.285,98	1.695,34
2017	1.183,18	919,16	976,92	1.205,73	1.611,42	2.142,49	2.533,83	2.884,04	3.144,58	3.194,05	2.906,36	2.948,37
2018	2.742,08	2.777,72	2.888,64	3.021,92	3.094,31	3.243,02	3.190,54	3.245,63	3.274,47	3.359,33	3.362,98	3.167,23
2019	2.729,27	2.167,46	1.677,21	1.475,93	1.580,07	2.054,40	2.285,79	2.791,74	3.236,40	3.465,64	3.452,07	3.095,44
2020	2.237,64	1.914,51	1.584,80	1.423,20	2.150,38	1.882,57	2.128,59	2.430,96	2.814,84	3.258,84	2.961,69	2.852,00
2021	2.319,65	2.611,69	1.808,41	2.030,95	2.374,89	2.606,40	2.791,42	2.693,20	2.863,27	2.741,97	2.413,33	1.914,17
2022	1.514,64	1.665,43	929,23	1.326,83	2.025,78	2.724,83	3.367,90	3.713,32	3.896,85	3.818,31	5.275,85	5.334,46
2023	5.124,90	4.809,11	4.208,11	4.336,49	4.673,44	4.908,24	5.043,22	5.258,32	5.453,00	5.385,74	5.336,91	5.442,40
2024	5.220,29	5.363,60	4.141,25	3.856,39	3.685,30	3.446,23	3.810,12	4.327,06	4.818,56	5.163,18	5.047,80	4.950,86
2025	4.051,94	2.638,81	3.038,78	2.504,12	2.941,72	3.766,09	4.318,81	4.953,56	5.312,14	5.299,99	5.333,85	5.214,68

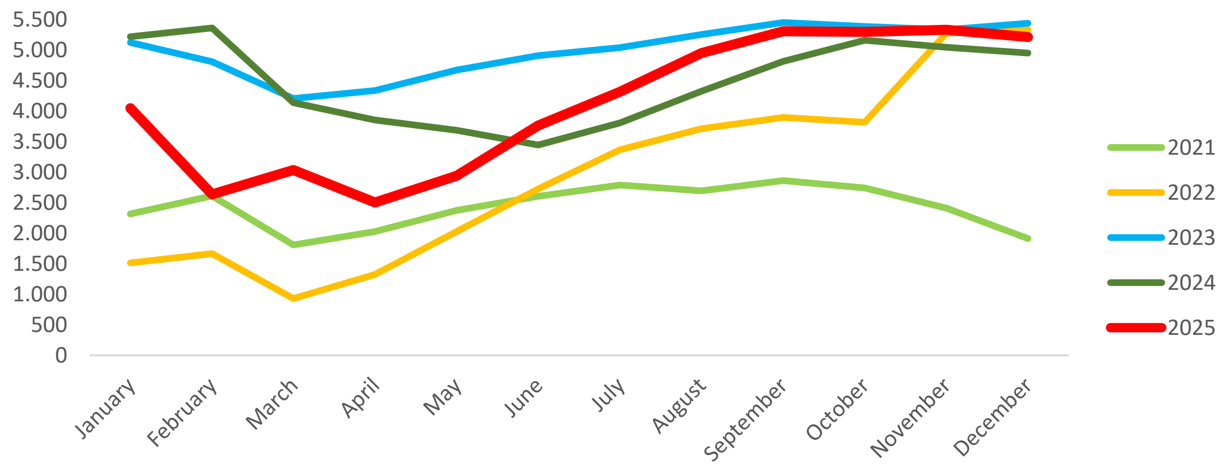

Figure 3.1: Month-End Natural Gas Stock Volume by Years (million Sm³)

As of 2025, the evaluation of storage stock volume together with imports and consumption is presented in Figure 3.2.

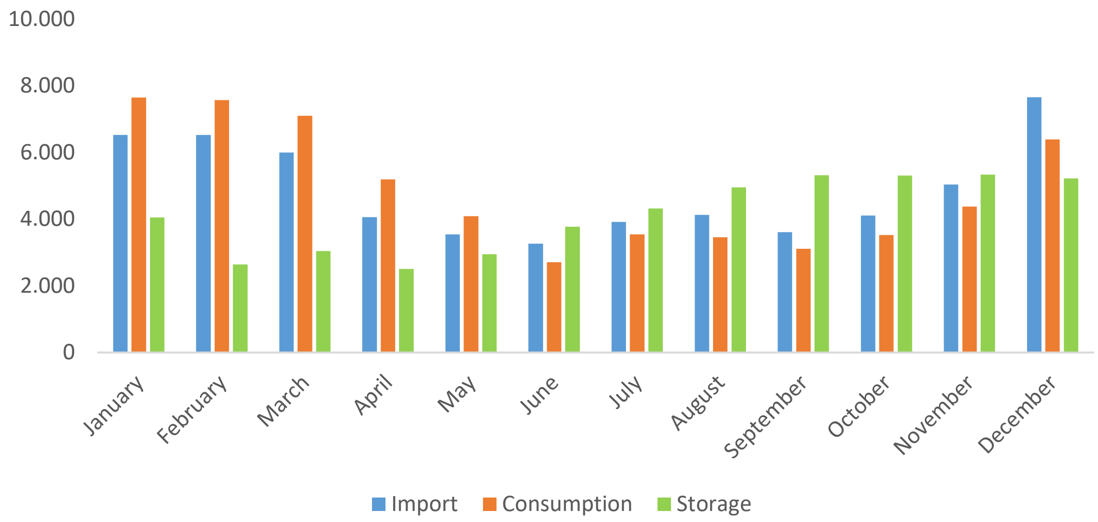

Figure 3.2: Comparison of Monthly Import, Consumption, and Stock Volumes in 2025 (Million Sm³)

3.1 Underground Natural Gas Storage

In 2025, the number of suppliers utilizing storage services at the BOTAŞ Silivri storage facility was 5. All of these suppliers, including BOTAŞ, are holders of import licenses. The BOTAŞ Tuz Gölü storage facility, however, was used exclusively by BOTAŞ.

3.2 LNG Storage

There are five operational LNG terminals established for the storage, regasification, and transmission of LNG procured through long-term contracts and from the spot market. These are: the Marmara Ereğlisi LNG Terminal, owned and operated by BOTAŞ, commissioned in 1994; the Ege Gaz A.Ş. LNG Terminal, established in Aliağa by Ege Gaz A.Ş. in 2001 and put into operation in 2006; the Floating LNG Terminal (FSRU) owned by Etki Liman İşletmeleri Doğal Gaz İthalat ve Ticaret A.Ş., which was commissioned in 2016 as Türkiye's first FSRU terminal; the Hatay Dörtyol

LNG Terminal (FSRU) owned by BOTAŞ, licensed in 2017; and the Saros LNG Terminal (FSRU), also owned by BOTAŞ, licensed in 2023.

The table below shows, on a monthly basis, the amounts of LNG delivered to land tankers by companies holding LNG storage licenses and the amounts of natural gas regasified and sent to the transmission grid during 2025.

Table 3.2: Monthly Gas Output from LNG Storage Facilities in 2025 (million Sm³)

	Transmission Network	Road Tanker	Total
January	2.832,35	48,84	**2.881,19**
February	3.178,54	46,19	**3.224,73**
March	2.364,04	45,54	**2.409,57**
April	569,64	45,26	**614,90**
May	274,43	45,94	**320,37**
June	389,28	36,26	**425,54**
July	245,70	44,79	**290,49**
August	401,14	46,50	**447,64**
September	209,23	49,90	**259,13**
October	667,93	57,20	**725,13**
November	1.870,20	53,95	**1.924,16**
December	3.496,86	58,59	**3.555,45**
Total	16.499,33	578,97	**17.078,30**

**Floating Storage and Regasification Unit (FSRU)*

4. Wholesale

The sale of natural gas—whether imported or domestically produced—to CNG operators, importers, exporters, distribution companies, other wholesale companies, and eligible consumers across the country is carried out by legal entities holding a wholesale license issued by our Authority. Legal entities that hold import licenses may conduct wholesale activities without being required to obtain a separate wholesale license.

As shown in Figure 4.1, in 2025, the total natural gas supply in our country amounted to 61.447,54 million Sm³, of which 90,80% was supplied by BOTAŞ, 4,13% by other import license holders (those that have carried out imports), and 5,06% by wholesale companies engaged in production.

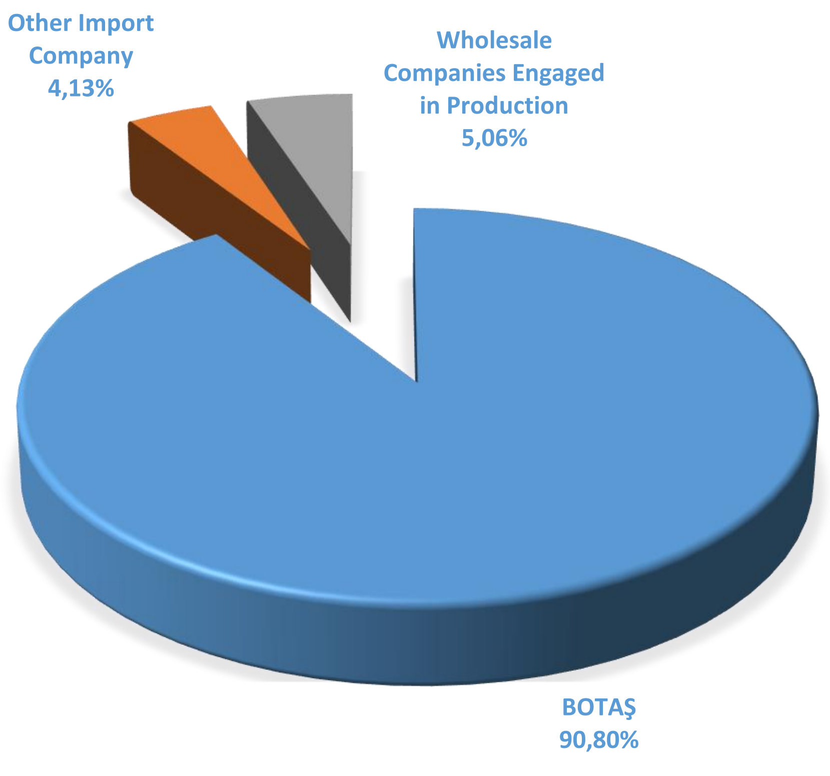

Figure 4.1: Shares of Importer and Production Companies in Natural Gas Supply, 2025 (%)

As of the end of 2025, there are 53 companies holding a wholesale license. Of these, 9 have actually engaged in natural gas production activities.

As is known, in addition to wholesale license holders, companies with import licenses also carry out wholesale activities. In this context, an examination of import license holders reveals the following:

- As of the end of 2025, there are 19 import (long-term) licenses. Among the 7 companies other than BOTAŞ that have imported gas through long-term import contracts, 4 companies had no activities, while 3 companies (Kibar, Akfel, and Bosphorus Gaz) carried out gas imports through long-term contracts and consequently conducted wholesale sales.
- As of the end of 2025, there are 74 companies holding import (spot) licenses. In 2025, only BOTAŞ, SOCAR Energy, Bosphorus Gaz, and Ege Gaz carried out spot pipeline gas/LNG imports. Of the remaining 70 companies, 12 engaged in wholesale activities with gas procured from domestic sources. The remaining 58 companies did not carry out any activities under their licenses during 2025.

4.1 Organized Wholesale Market

The Regulation on the Organized Wholesale Natural Gas Market was published in the Official Gazette dated March 31, 2017 (No. 30024), and the Operational Procedures and Principles of the Organized Wholesale Natural Gas Market were published in the Official Gazette dated September 23, 2017 (No. 30189), thereby coming into force. Accordingly, the Organized Wholesale Natural Gas Market (OTSP)—a trading platform that enables natural gas transmission system users to trade on a continuous trading basis (where buy and sell orders are matched instantly) and to balance their positions—became operational on September 1, 2018.

With the launch of the OTSP, Türkiye became the first country in its region to establish a daily natural gas trading exchange. The Türkiye Daily Reference Natural Gas Price (GRF), formed within a competitive market under objective and transparent conditions, is expected to serve as a significant signal for investment and to make substantial contributions to Türkiye's goal of becoming a regional gas trading hub.

In parallel with the market reaching a certain level of maturity, a regulatory amendment introduced in 2020 enabled the inclusion of weekly products. In this context, the Natural Gas Futures Market (VGP), which offers market participants greater portfolio flexibility for risk management and the opportunity for active gas trading through price arbitrage, was launched on October 1, 2021, following an extensive period of preparatory work.

In addition to daily and weekly products, the introduction of monthly, quarterly, and annual products under the VGP framework is expected to further enhance product diversity and liquidity in the OTSP. This development will support the increase in market activity and trading volume, thereby contributing to the overall growth and maturity of the market.

Throughout 2025, a total of 16 license holders participated in market operations, including 1 transmission license holder, 9 import license holders, 2 export license holders, and 4 wholesale license holders. Table 4.1 presents the monthly natural gas trading volumes in the Organized Wholesale Market during 2025.

Table 4.1: Monthly Traded Natural Gas Volume in the Organized Wholesale Market, 2025 (million Sm³)

2025	January	February	March	April	May	June	July	August	September	October	November	December	Total
Trade Volume	20,27	53,16	40,26	52,20	25,45	25,17	23,94	21,50	18,46	27,88	15,99	23,87	348,13

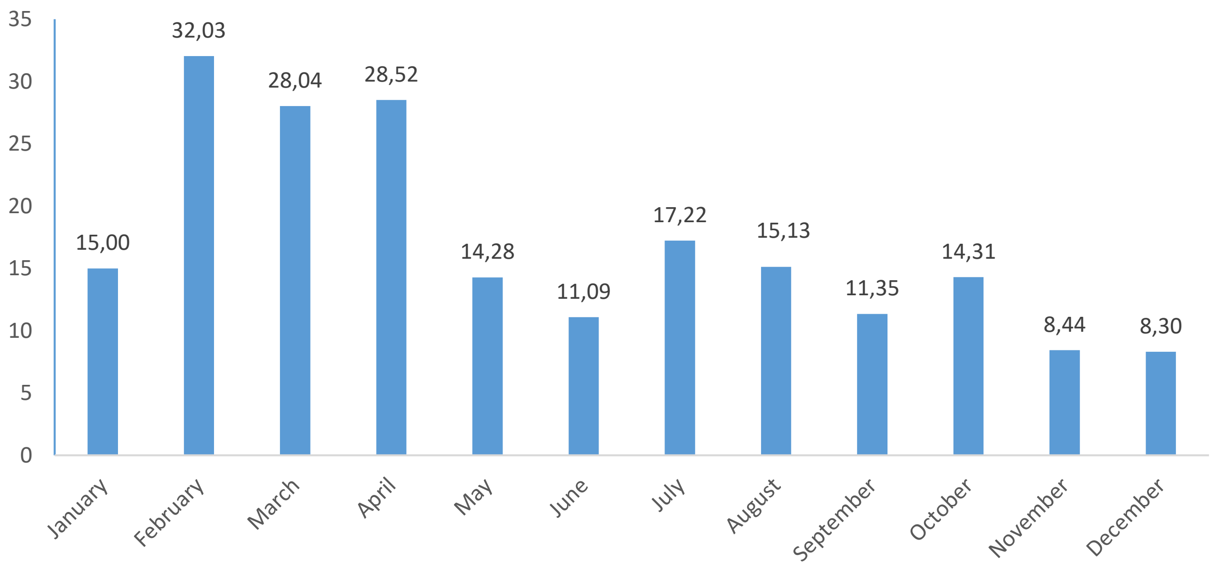

Figure 4.2: Additional Balancing Gas Purchases by BOTAŞ in the Organized Wholesale Market, by Month (million Sm³), 2025

4.2 Wholesale via Pipeline

In 2025, wholesale natural gas sales via pipeline were carried out by 28 license holders. These include companies engaged in natural gas production, companies engaged in natural gas importation, and companies that neither produce nor import gas but rather purchase gas from suppliers to sell in the market.

Table 4.2 presents the volumes of pipeline gas sales by license type.

Table 4.2: Volume of Wholesale Pipeline Gas Sales by License Type (million Sm³)

License Type	Number of Companies Selling to Licensed Companies	Sales Volume to Licensed Companies
Long Term Import License	4	36.824,00
Wholesale License (Non-producer)	3	611,12
Spot (LNG) Import License	13	1.217,59
Wholesale License (Producer)	8	2924,09
Total	**28**	**41.576,81**

4.3 Wholesale of LNG

In areas where pipeline transport of natural gas is not technically or economically viable, natural gas is used in liquefied form (LNG) and delivered to end consumers via road tankers.

A portion of the LNG imported by import license holders is sold to the market in LNG form through the Marmara Ereğlisi and Aliağa LNG terminals. In 2025, the total volume of wholesale LNG sales by wholesale and import license holders amounted to 671,89 million Sm³. Table 4.3 presents the wholesale natural gas sales in LNG form conducted by 11 licensed companies in 2025, broken down by license type.

Table 4.3: Wholesale LNG Volumes by License Type (Million Sm³)

License Type	Number of Companies Selling to Licensed Companies	Sales Volume to Licensed Companies
Import (Spot) License	3	122,92
Long Term Import License	1	469,97
Wholesale License	7	79,00
Total	**11**	**671,89**

4.4 Natural Gas Trade Among License Holders Operating in the Natural Gas Market

The total volume of natural gas traded among companies operating in the natural gas market in 2025 is presented in Table 4.4.

Table 4.4: Total Natural Gas Sales Volumes by License Holders by License Type, 2025 (million Sm³)

License Type	Volume
Distribution License	277,42
Import License	38.842,31
CNG License	403,36
Wholesale License	3.614,36
Total Trade	**43.137,46**

In 2025, import license holders accounted for 90,04% of total sales to license holders, while wholesale license holders accounted for 8,38%. Among the 68 companies that supplied the aforementioned 43.137,46 million Sm³ of natural gas, the top 10 suppliers are presented in Table 4.5.

Table 4.5: Top 10 Natural Gas Suppliers to License Holders and Their Sales Shares, 2025 (million Sm³)

Company Name	Sales Volume	Share (%)
BOTAŞ BORU HATLARI İLE PETROL TAŞIMA ANONİM ŞİRKETİ	35.475,43	82,24
TÜRKİYE PETROLLERİ ANONİM ORTAKLIĞI	2.907,32	6,74
BOSPHORUS GAZ CORPORATİON ANONİM ŞİRKETİ	1.315,98	3,05
SOCAR ENERJİ TİCARET ANONİM ŞİRKETİ	811,07	1,88
AKFEL GAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	617,45	1,43
KİBAR ENERJİ ANONİM ŞİRKETİ	519,67	1,20
ELMİ DOĞAL GAZ ANONİM ŞİRKETİ	332,99	0,77
NATURELGAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	234,72	0,54
ELA DOĞAL GAZ ANONİM ŞİRKETİ	127,65	0,30
EGE GAZ ANONİM ŞİRKETİ	107,80	0,25

Table 4.6 presents the volume of natural gas purchased by license holders from other license holders in the natural gas market in 2025.

Table 4.6: Total Natural Gas Purchased by License Holders from Other License Holders, 2025 (million Sm³)

License Type	Volume
Distribution License	33.774,91
Import License	6.193,58
CNG License	593,87
Wholesale License	1.956,48
Export License	1,07
Total Trade	**42.519,91**

In 2025, distribution license holders accounted for the highest share of natural gas purchases, with 79,43%, followed by import license holders with 14,57%. Among the 123 companies that purchased gas from the domestic market, the top 10 purchasers are listed in Table 4.7.

Table 4.7: Purchase Shares of the Top 10 Natural Gas License Holders Purchasing the Largest Volume of Natural Gas from License Holders, 2025 (Million Sm³)

Company Name	Sales Volume	Share (%)
İGDAŞ İSTANBUL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	7.278,45	17,12
BAŞKENT DOĞALGAZ DAĞITIM GAYRİMENKUL YATIRIM ORTAKLIĞI ANONİM ŞİRKETİ	3.278,24	7,71
İZMİR DOĞALGAZ DAĞITIM TİCARET VE TAAHHÜT ANONİM ŞİRKETİ	1.436,59	3,38
PALGAZ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	1.408,39	3,31
SOCAR ENERJİ TİCARET ANONİM ŞİRKETİ	1.359,65	3,20
BURSA ŞEHİRİÇİ DOĞAL GAZ DAĞITIM TİCARET VE TAAH. ANONİM ŞİRKETİ	1.153,48	2,71
TRAKYA BÖLGESİ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.092,13	2,57
AKSA ÇUKUROVA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.057,63	2,49
GAZDAŞ GAZİANTEP DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	958,59	2,25
İZGAZ İZMİT GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	935,03	2,20

**Excludes natural gas purchases made by BOTAŞ.*

5. Compressed Natural Gas (CNG)

Companies holding CNG licenses carry out various activities across the country within the scope of their licenses. These activities include: purchasing natural gas from wellheads, the national transmission network, or city distribution systems; compressing and filling it into pressurized containers for sale; transporting compressed natural gas between cities using specialized vehicles; purchasing CNG from refueling stations or wholesale producers at the wellhead, compressing it with onboard equipment, and filling it into pressurized tanks; and reducing the pressure of compressed natural gas for sale in areas not covered by the transmission network.

In 2025, a total of 593,87 million Sm^3 of natural gas was purchased by companies with CNG licenses for compression. Of this volume, 0,24% was purchased in LNG form. The sales shares of license holders according to the license types of supplier companies are provided in Figure 5.1.

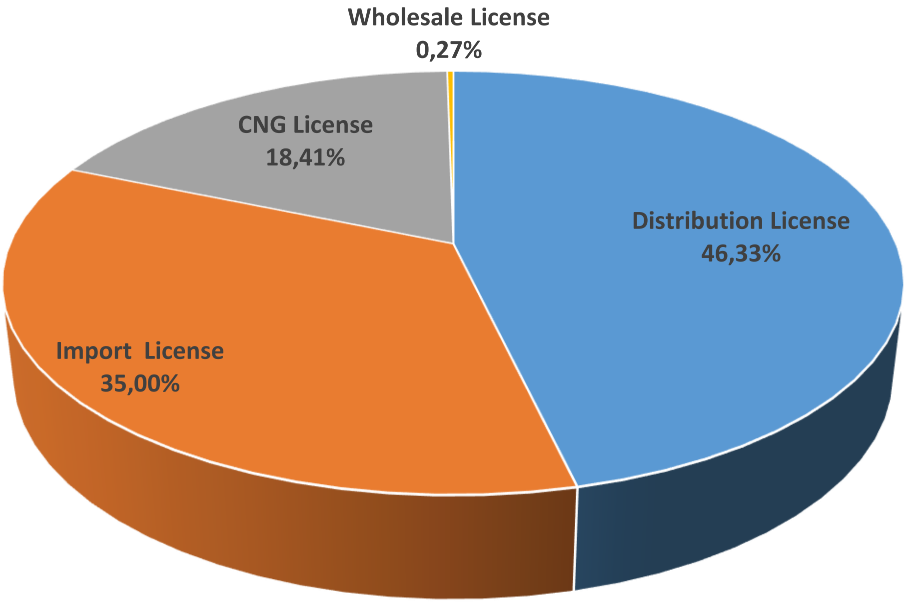

Figure 5.1: Market Share of CNG License Holders by Supplier Company License Types (%)

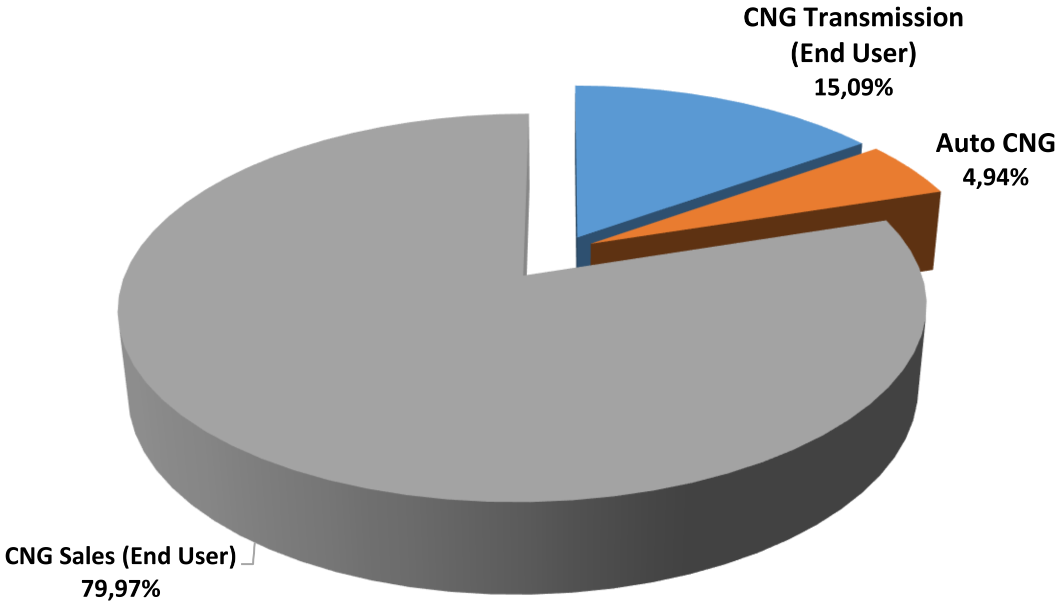

Figure 5.2: Distribution of CNG Sales to End Users in 2025 by License Type (%)

In 2025, CNG license holders conducted a total of 188,60 million Sm³ of CNG sales to end users. The distribution of this volume by license subtype is shown in Figure 5.2. Accordingly, 79,97% of the sales to end users were carried out by CNG Sales License holders. The share of sales made under the Auto CNG license in 2025 is 4,94%. The volumes of CNG sold to end users from 2015 to 2025 are presented in Table 5.1.

Table 5.1: CNG Sales Volumes (2015-2025) (million Sm³)

Years	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Volume	178,24	190,31	219,65	211,84	227,36	210,79	196,29	203,53	176,48	191,46	188,60

6. Transmission

6.1 Transmission via Pipelines

In 2025, approximately 63,90 billion Sm³ of physical natural gas was injected into the transmission network by import and wholesale companies operating in the natural gas market through 15 Entry Points (BOTAŞ North Marmara-Değirmenköy Storage, Dörtyol FSRU Terminal, Durusu Entry Point, Egegaz Aliağa LNG Terminal, Etki LNG Terminal, Filyos Production Entry Point, Gürbulak Entry Point, Kıyıköy Entry Point, Marmara Ereğlisi LNG Terminal, Marsa Gelibolu, Saros FSRU Terminal, TANAP Seyitgazi, TPAO Çayağzı Production, Tuz Gölü Underground Storage Facility, and Türkgözü Entry Point). Of this injection volume, 96,29% was carried out by BOTAŞ and 3,71% by private sector import and wholesale companies. Meanwhile, approximately 63,87 billion Sm³ of physical natural gas was withdrawn from the transmission network in 2025. The highest injection and withdrawal volumes occurred during the winter months when natural gas demand is high; the monthly distribution of the total natural gas injected into and withdrawn from the transmission network in 2025 is shown in Figure 6.1.

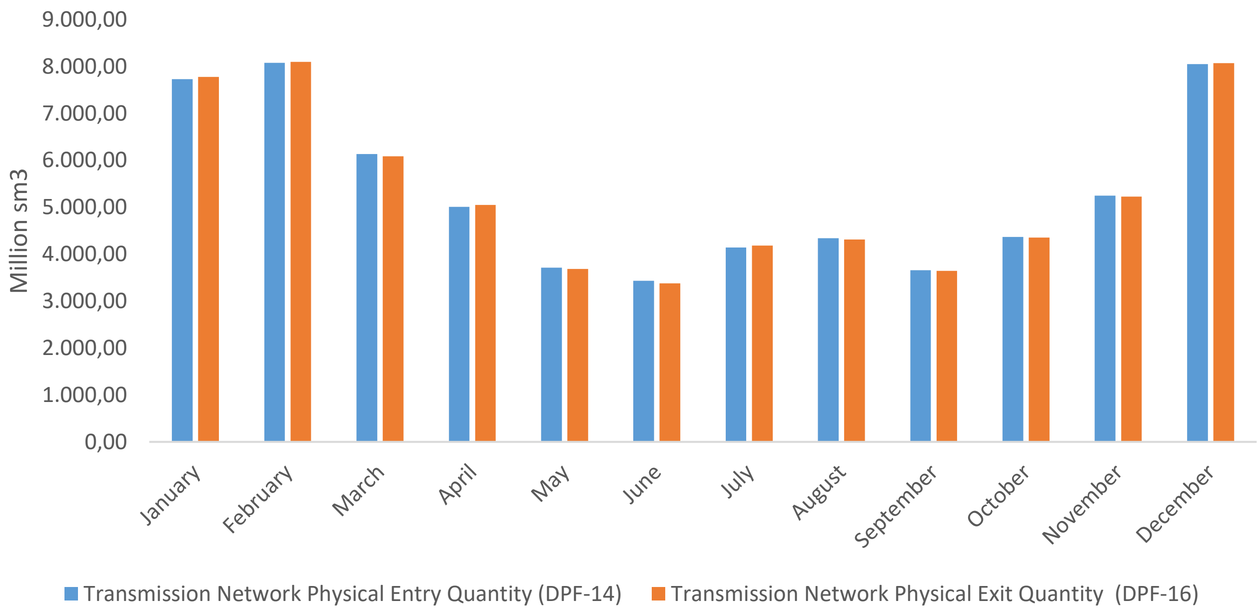

Figure 6.1: Monthly Distribution of Natural Gas Volumes Entering and Exiting the Transmission Network in 2025 (Million Sm³)

In 2025, the highest daily withdrawal from the natural gas transmission network occurred on February 24, 2025, amounting to 339,02 million Sm³. The distribution of the highest daily withdrawal volumes recorded each month in the natural gas transmission network during 2025 is presented in Figure 6.2.

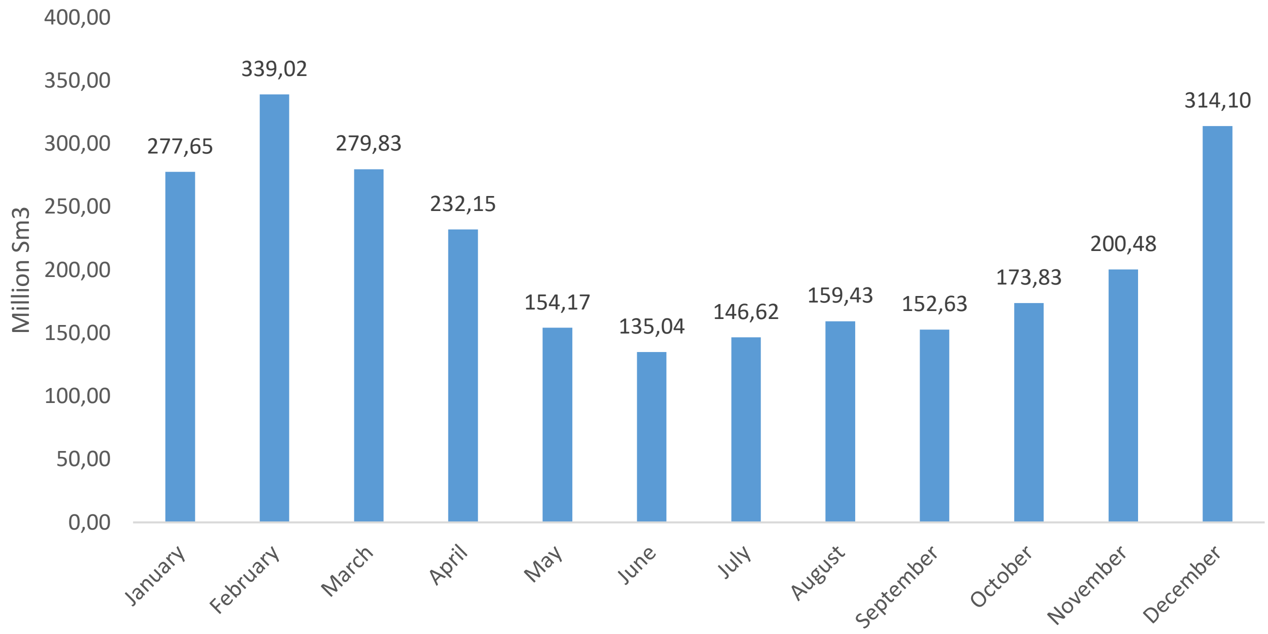

Figure 6.2: Monthly Distribution of the Maximum Daily Withdrawal Volume in 2025 (Million Sm³)

In 2025, 277,74 million Sm³ of gas for internal use was injected into the national transmission network. The monthly distribution of the gas for internal use injected into the network is presented in Table 6.1.

Table 6.1: Quantities of Natural Gas Injected into the National Transmission Network for Internal Consumption in 2025 (Million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Quantity	11,22	9,99	16,09	25,50	29,97	27,52	31,52	31,38	27,89	26,77	24,11	15,77	277,74

The national transmission network stock quantities as of the end of the month in 2025 are shown in Table 6.2.

Table 6.2: Transmission Network Stock Quantities as of Month-End 2025 (Million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December
Quantity	417,97	417,34	419,59	418,58	418,97	419,49	417,97	419,40	419,10	418,90	419,69	419,53

An analysis of natural gas trading involving entry into the transmission network at 15 entry points in 2025 reveals that 9 shippers physically injected natural gas into the national transmission network, while 8 shippers physically withdrew natural gas from it. Additionally, 7 shippers injected natural gas via virtual trading points, and 5 shippers withdrew natural gas using virtual trading points.

The volume of virtual trading carried out by shippers at the National Balancing Point (NBP) and transfer points in 2025 amounted to approximately 8,82 billion Sm³. Of this volume, 87,68% took place at the NBP, while 12,32% occurred at transfer points.

Figure 6.3 shows the monthly distribution of the virtual trade volume realized at NBP and transfer points in 2025.

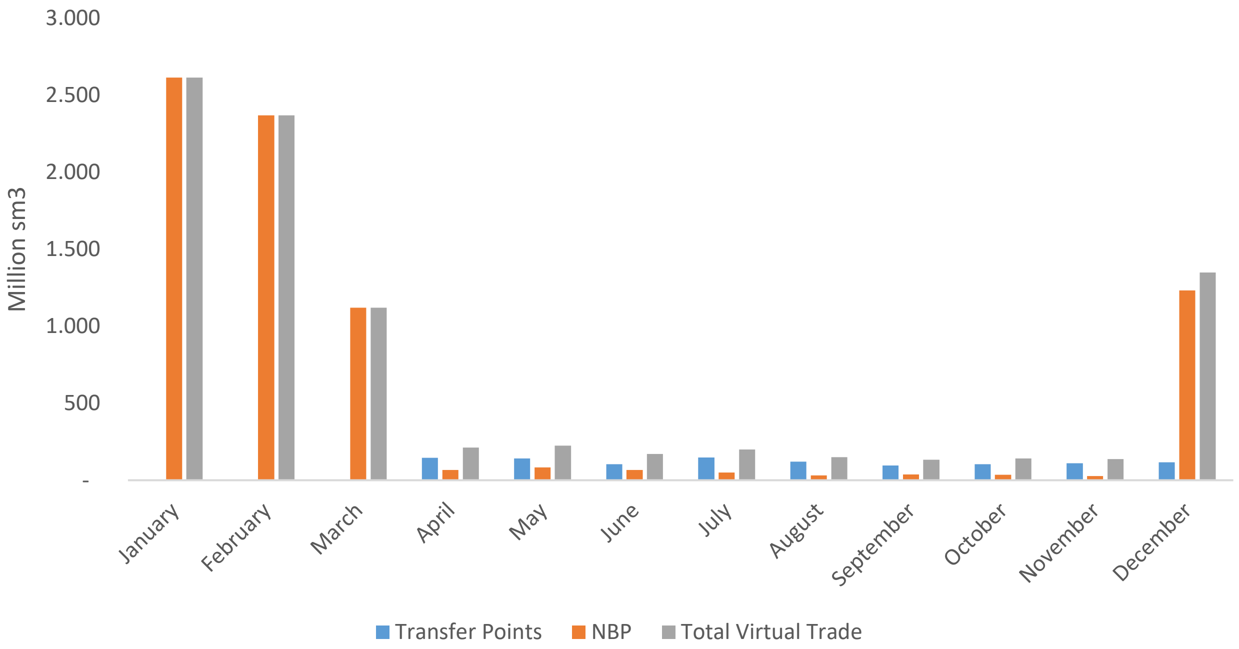

Figure 6.3: Monthly Distribution of Virtual Trade in 2025 (Million Sm³)

Shippers operating on the transmission network caused a total imbalance of approximately 3.695 million Sm³ in 2025. The net imbalance volume for the year amounted to -453 million Sm³. Of the imbalance recorded in 2025, approximately 56,13% resulted from the withdrawal of gas from the system (negative imbalance), while 43,87% resulted from the injection of gas into the system (positive imbalance). The monthly distribution of the imbalance volume on the transmission network in 2025 is shown in Figure 6.4.

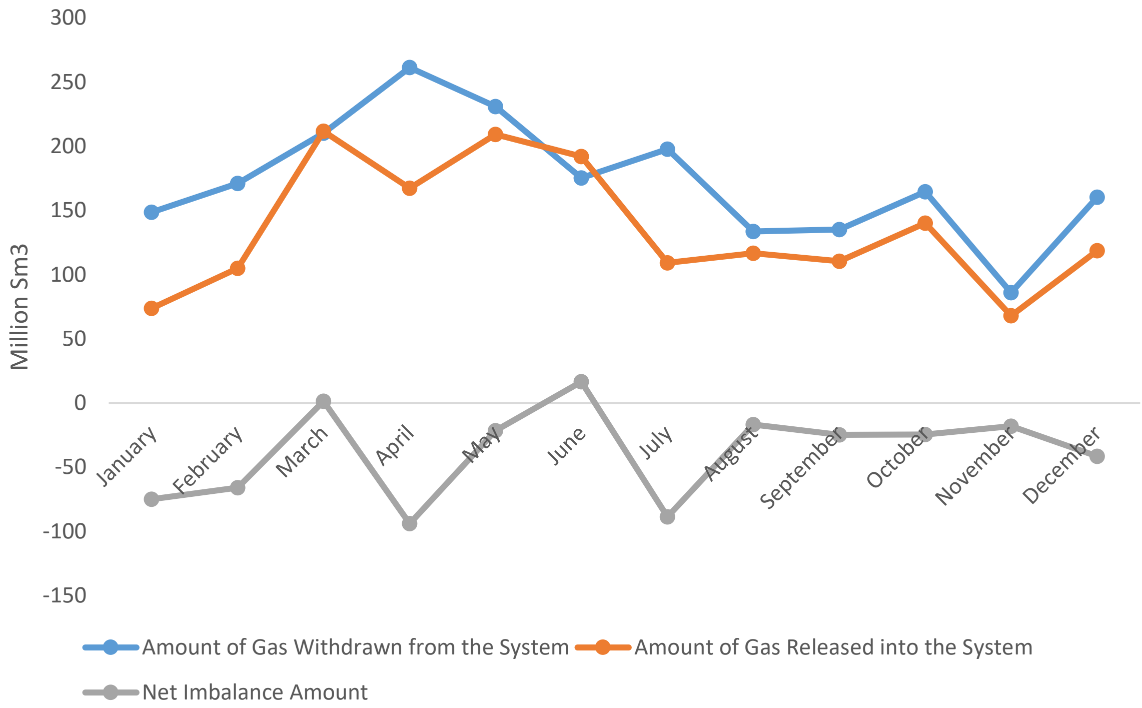

Figure 6.4: Monthly Distribution of the Imbalance Quantity in the Transmission Network in 2025 (Million Sm³)

6.2 LNG Transmission

In accordance with the law, transmission activities may be carried out via pipelines or, subject to obtaining a license from the Board, by means of LNG transport vehicles. A total of 721,88 million Sm³ of LNG was transported in 2025 by the 12 holders of transmission (LNG) licenses, and the monthly LNG volumes transmitted over the years are presented in the table below.

Table 6.3: Monthly Distribution of Transmitted LNG Volumes by Year* (Million Sm³)

	January	February	March	April	May	June	July	August	September	October	November	December	Total
2016	49,14	44,27	48,57	50,17	59,64	62,01	55,76	69,44	57,61	73,41	70,00	62,55	702,56
2017	56,03	50,05	54,68	62,80	71,15	65,46	76,79	80,08	74,68	87,63	84,06	73,87	837,3
2018	60,10	51,74	58,45	71,07	78,42	71,81	84,12	66,32	66,91	71,37	62,81	56,42	799,5
2019	54,79	48,80	58,04	53,76	54,49	46,52	57,58	51,06	62,29	62,22	53,90	51,87	655,3
2020	51,17	46,17	40,73	32,47	32,14	39,33	46,87	53,76	63,12	64,09	59,97	54,04	583,9
2021	45,61	41,95	49,22	45,56	46,13	61,97	58,89	67,89	67,14	73,17	62,24	53,93	673,7
2022	50,89	45,76	53,00	42,31	43,29	45,20	44,52	51,74	55,73	57,28	50,72	47,33	587,76
2023	43,49	42,90	41,60	41,70	48,72	42,83	51,00	54,50	56,65	60,48	53,42	58,10	595,39
2024	59,03	55,71	56,54	40,09	49,66	41,58	49,04	49,56	54,69	63,81	65,07	65,12	649,91
2025	61,13	57,39	57,34	58,11	59,06	46,24	57,15	59,88	61,55	70,23	63,65	70,14	721,88

*The natural gas volumes subcontracted by LNG transmission companies to one another have been included in the table..

Table 6.4: Monthly LNG Volumes Delivered by Company (Million Sm³)

Company Name	January	February	March	April	May	June	July	August	September	October	November	December	Total
AKPET GAZ ANONİM ŞİRKETİ	2,85	2,79	2,96	4,02	4,69	4,14	4,38	5,05	5,09	4,43	2,89	2,79	46,08
AYGAZ DOĞAL GAZ TOPTAN SATIŞ ANONİM ŞİRKETİ	7,36	7,27	7,27	6,01	5,72	5,13	7,24	7,93	8,96	10,90	11,61	12,41	97,79
BOTAŞ BORU HATLARI İLE PETROL TAŞIMA ANONİM ŞİRKETİ	0,05	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,05
ENERJİ GRUP SIVI DOĞAL GAZ LNG AKARYAKIT PETROL ÜRÜNLERİ TOPTAN SATIŞ ANONİM ŞİRKETİ	0,84	0,77	0,87	0,95	1,63	1,09	1,59	1,57	1,70	1,54	0,92	0,93	14,40
HABAŞ SINAİ VE TIBBİ GAZLAR İSTİHSAL ENDÜSTRİSİ ANONİM ŞİRKETİ	3,00	2,76	2,93	3,25	3,44	2,69	4,18	3,80	4,23	4,74	3,87	3,06	41,95
HAS-GAZ LPG DAĞITIM VE METAL SANAYİ TİCARET ANONİM ŞİRKETİ	0,85	1,16	1,51	1,16	1,60	1,15	1,45	1,38	1,62	1,49	1,98	1,96	17,29
İPRAGAZ ANONİM ŞİRKETİ	14,95	14,35	15,22	18,97	19,15	17,21	19,03	20,03	19,54	21,93	14,95	15,11	210,44
LİKİTGAZ DAĞITIM VE ENDÜSTRİ ANONİM ŞİRKETİ	0,72	0,73	0,42	0,50	0,59	0,53	0,62	0,67	0,68	1,60	1,66	2,04	10,76
NATURELGAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	2,18	2,71	1,98	1,63	0,83	0,37	0,24	0,24	0,23	1,13	2,08	3,34	16,97

OMV ENERJİ TİCARET ANONİM ŞİRKETİ	12,91	11,02	11,53	10,75	10,81	6,70	8,36	8,70	8,52	9,87	10,28	12,34	121,79
OMV GAZ İLETİM ANONİM ŞİRKETİ	8,13	6,97	7,14	6,86	6,80	4,46	6,17	6,66	5,98	6,18	5,86	6,83	78,03
OR-CAN DOĞAL GAZ TOPTAN SATIŞ DAĞITIM ANONİM ŞİRKETİ	6,85	6,56	5,25	3,87	3,60	2,57	3,69	3,71	4,62	6,10	6,96	8,42	62,20
Grand Total	61,13	57,39	57,34	58,11	59,06	46,24	57,15	59,88	61,55	70,23	63,65	70,14	721,88

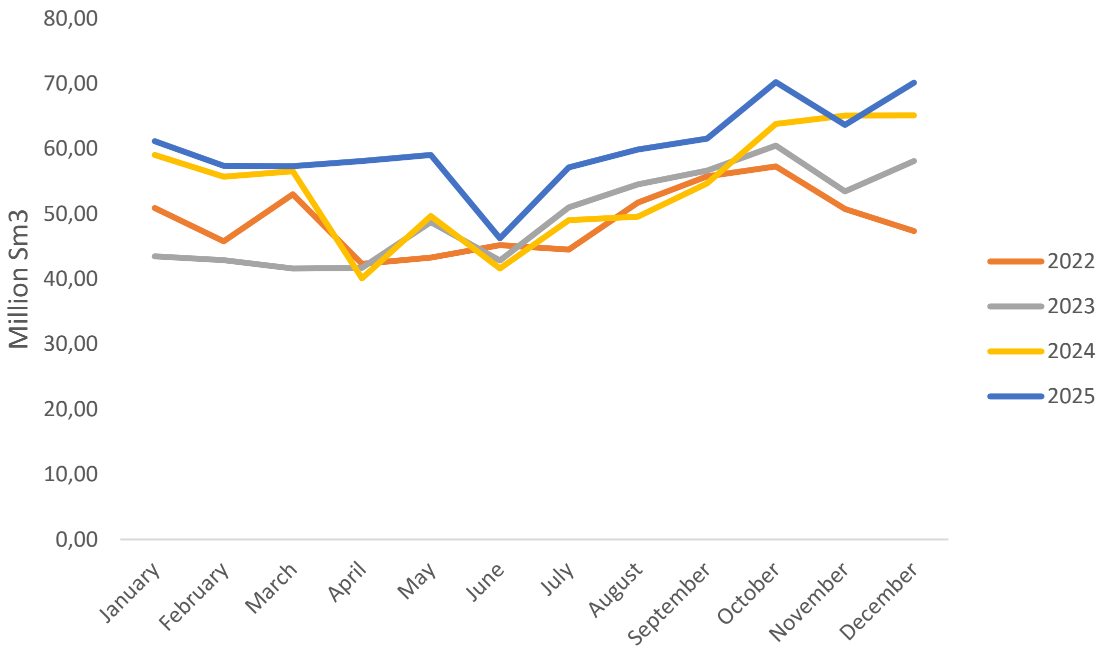

Figure 6.5: Monthly LNG Volumes Delivered by Year (Million Sm³)

7. Distribution

7.1 Distribution License Tenders

As of 2025, the number of companies holding natural gas distribution licenses—and consequently, the number of distribution zones—stands at 73. By the end of 2025, natural gas service has been extended to a total of 840 districts and 142 towns, including all 81 provincial centers.

7.2 Network Investment Performance

As of the end of 2025, the length of steel pipelines constructed by companies holding distribution licenses reached approximately 20.097 km; polyethylene pipelines, approximately 148.125 km; and service lines, 58.744 km; while the number of service lines reached 5.529.779. Table 7.1 shows the lengths of steel and polyethylene pipelines constructed in Turkey by companies holding natural gas distribution licenses.

Table 7.1: Total Steel and Polyethylene Network Lengths, Service Line Lengths, and Number of Service Lines in Distribution Regions

Year	Number of Service Lines	Service Line Length (km)	Polyethylene Network Length (km)	Steel Network Length (km)
2021	4.250.875	43.295,74	108.613,42	15.702,35
2022	4.541.498	46.894,24	118.266,37	16.810,21
2023	4.896.663	51.119,08	128.785,86	17.985,24
2024	5.221.343	54.907,20	138.290,83	19.127,13
2025	5.529.779	58.744,63	148.125,39	20.097,10

7.3 Subscription and Connection Information

It has been decided—via Board Decision No. 13093 dated 19.12.2024, published in the Official Gazette dated 24.12.2024 and numbered 32762—to apply unchanged throughout 2025 the Board Decision No. 5362 dated 18.12.2014 (published in the Official Gazette dated 26.12.2014 and numbered 29217), which had originally been adopted for application throughout 2015 regarding the threshold for being an eligible consumer in the natural gas market. The changes in the eligible consumer limit in the natural gas market over the years are presented in Table 7.3.

Table 7.2: Change of Eligible Consumer Limit in the Natural Gas Market over the Years (2005-2025)

Year Applied	Number of Board Decision	Eligible Consumer Limit (m^3)	
		Incumbent Companies and Tender-Awarded Companies That Have Completed Five Years Since the License Effective Date	Other Companies That Obtained Licenses Through Tenders
2005	408	1.000.000	15.000.000
2006	629	1.000.000	15.000.000
2007	1032	1.000.000	15.000.000
2008	1438 ve 1808/1	1.000.000	15.000.000
2009	1896/1	1.000.000	15.000.000
2010	2378	800.000	15.000.000
2011	2966	700.000	15.000.000
2012	3600	300.000	15.000.000
2013	4168	With the exception of residential consumers (households) whose consumption is below 300.000 m^3, all consumers are eligible consumers.*	It is specified in the tender notice and the license.
2014	4793	With the exception of residential consumers (households) whose consumption is below 100.000 m^3, all consumers are eligible consumers.*	It is specified in the tender notice and the license.
2015	5362	With the exception of residential consumers (household consumers) whose consumption is below 75.000 m^3, all consumers are eligible consumers.*	It is specified in the tender notice and the license.
2016	5920		
2017	6778		
2018	7537		
2019	8265		
2020	8996		
2021	9818		
2022	10627		
2023	11335		
2024	12206		
2025	13093		

*For residential consumers, the consumption amount measured via a single meter is taken into account when calculating the eligible consumer threshold.

As of the end of 2025, the total number of subscribers receiving natural gas service reached 21.950.003, while the number of eligible consumers reached 848.595.

Table 7.3: Distribution of the Number of Subscribers and Eligible Consumers

Year	Number of Subscribers	Number of Eligible Consumers	Total
2021	17.879.064	674.533	18.553.597
2022	18.982.872	725.236	19.708.108
2023	20.009.606	772.200	20.781.806
2024	21.035.070	808.654	21.843.724
2025	21.950.003	848.595	22.798.598

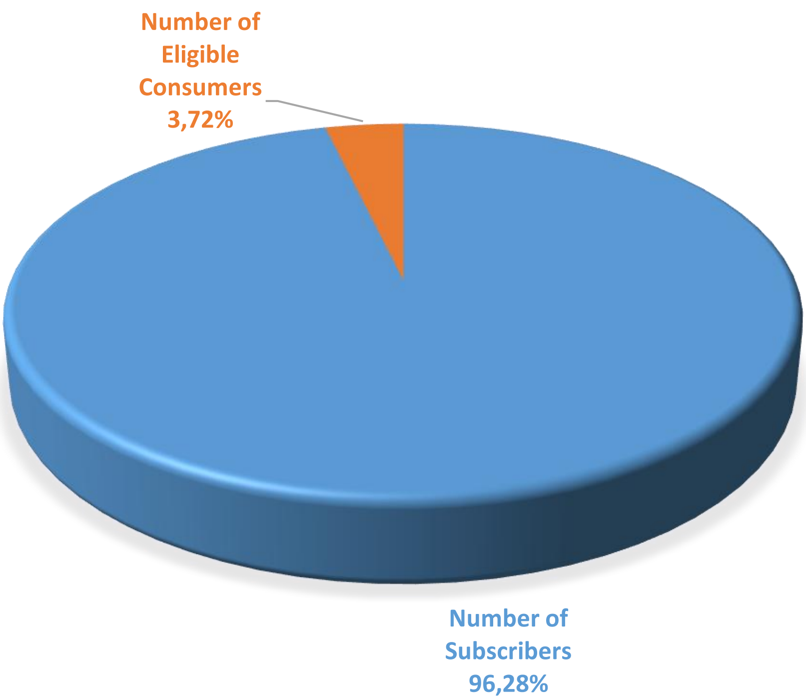

Figure 7.1: Distribution of the Number of Subscribers and Eligible Consumers as of the End of 2025 (%)

Table 7.4: Distribution of Consumption by Subscribers and Eligible Consumers (Million Sm³)

Year	Consumption by Subscribers	Consumption by Eligible Consumers
2021	16.061,27	11.624,81
2022	17.336,20	12.234,57
2023	16.292,36	11.697,29
2024	18.261,86	12.237,56
2025	20.079,29	13.613,99

An examination of the monthly natural gas consumption volumes of subscribers in 2025 reveals that consumption peaked in March (3.725 million Sm³). August was the month with the lowest residential consumption (272 million Sm³). This is illustrated in Figure 7.2.

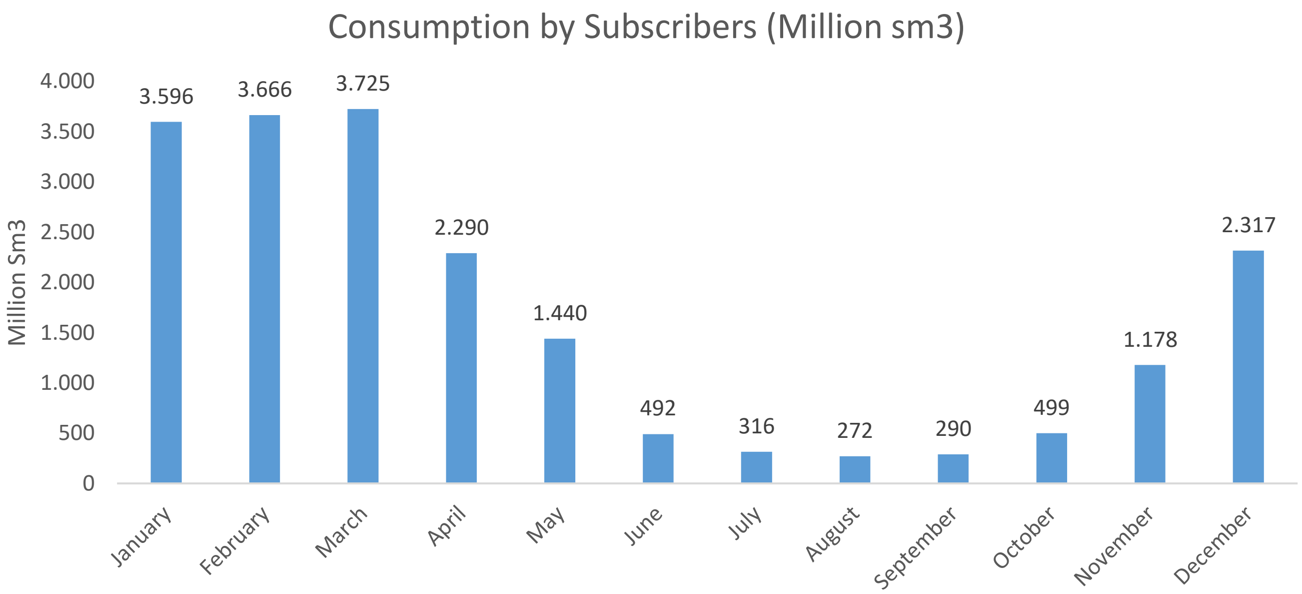

Figure 7.2: Monthly Natural Gas Consumption Volumes of Natural Gas Subscribers for 2025 (Million Sm³)

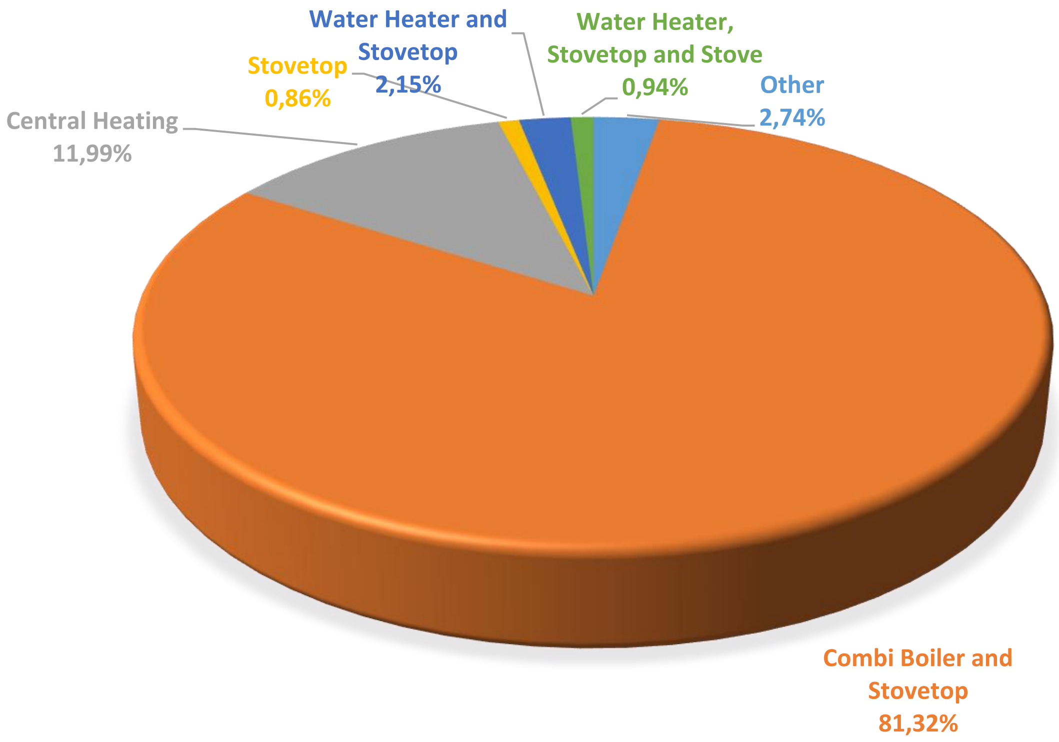

Figure 7.3: Distribution of Subscribers' Natural Gas Consumption by Usage Type for 2025 (%)

7.4 Activities Related to Supplying the Distribution Network with LNG or CNG

Throughout 2025, a total of 371,32 million Sm³ of natural gas was supplied to end-consumers in 64 provinces by feeding regional distribution networks with CNG and/or LNG. Of the gas supplied, 0,27% was obtained by compressing gas drawn from the main distribution network, 76,22% through CNG purchases from CNG license holders, 0,27% by compressing gas drawn from the transmission network, and 23,25% through LNG purchases from wholesale license holders. Table 7.5 presents the natural gas consumption volumes of regional networks categorized by supply method.

Table 7.5: Regional Grid Natural Gas Consumption Volumes by Province and Supply Type (Milyon Sm^3)

Province	By being compressed from the main distribution network	CNG Purchase	By being compressed from the transmission network	LNG Purchase	Total
ADANA		1,26		4,08	5,33
ADIYAMAN		10,42			10,42

Province	By being compressed from the main distribution network	CNG Purchase	By being compressed from the transmission network	LNG Purchase	Total
AFYONKARAHİSAR		0,25		1,88	2,13
AĞRI		1,21			1,21
ANKARA		13,58			13,58
ANTALYA		2,71		0,2	2,91
ARDAHAN		4,31			4,31
ARTVİN		4,05			4,05
AYDIN		0,76			0,76
BALIKESİR		2,22		7,54	9,76
BATMAN		3,12			3,12
BAYBURT		0,99			0,99
BİLECİK		0,83			0,83
BİNGÖL		1,07			1,07
BİTLİS		0,22			0,22
BOLU				5,24	5,24
BURDUR		6,16			6,16
ÇANAKKALE		1,82		3,59	5,41
ÇORUM		5,61			5,61
DENİZLİ		10,23			10,23
DİYARBAKIR		1,18		2,37	3,55
EDİRNE		20,54			20,54
ELAZIĞ		1,53			1,53
ERZİNCAN	1		0,99	2,73	4,72
ERZURUM		7,57			7,57
ESKİŞEHİR		3,26			3,26
GAZİANTEP		12,24			12,24
GİRESUN		2,99		17,14	20,13
GÜMÜŞHANE				1,41	1,41
HATAY		2,51			2,51
ISPARTA		12,4			12,4
İZMİR		6,6			6,6
KAHRAMANMARAŞ				10,61	10,61
KARABÜK		1,69			1,69
KARAMAN		0,79		4,65	5,45
KARS		0,32			0,32
KASTAMONU		23,18			23,18

Province	By being compressed from the main distribution network	CNG Purchase	By being compressed from the transmission network	LNG Purchase	Total
KAYSERİ		2,21			2,21
KIRIKKALE		1,15			1,15
KIRKLARELİ		23,36			23,36
KIRŞEHİR		1,07			1,07
KİLİS		0,17			0,17
KONYA		17,62		5,31	22,92
KÜTAHYA		0,19			0,19
MALATYA		3,38			3,38
MANİSA		3,72		1,81	5,53
MERSİN				8,82	8,82
MUĞLA		2,58			2,58
NEVŞEHİR		3,94			3,94
NİĞDE		3,54			3,54
ORDU		6,49		1,66	8,15
OSMANİYE					
RİZE		6,56		0,49	7,05
SAKARYA		2,4			2,4
SAMSUN		1,12			1,12
SİİRT		2,34			2,34
SİNOP		0,76			0,76
SİVAS				5,6	5,6
TEKİRDAĞ		18,15			18,15
TOKAT				1,19	1,19
TRABZON		2,53			2,53
UŞAK		3,69			3,69
VAN		5,27			5,27
YOZGAT		3,11			3,11
Grand Total	1	283,01	0,99	86,32	371,32

7.5 Suspension of Natural Gas Distribution Service (Temporary Gas Cut Off)

It has been determined that distribution companies carried out temporary gas cut offs for 2.156.461 customers in 2025. It is observed that approximately 70,14% of these cut offs were due to failure to pay bills on time, 13,39% were due to unauthorized or illegal natural gas usage, and 7,17% were carried out at the customer's request. The reasons for the temporary gas cut offs in 2025 are shown in Figure 7.4.

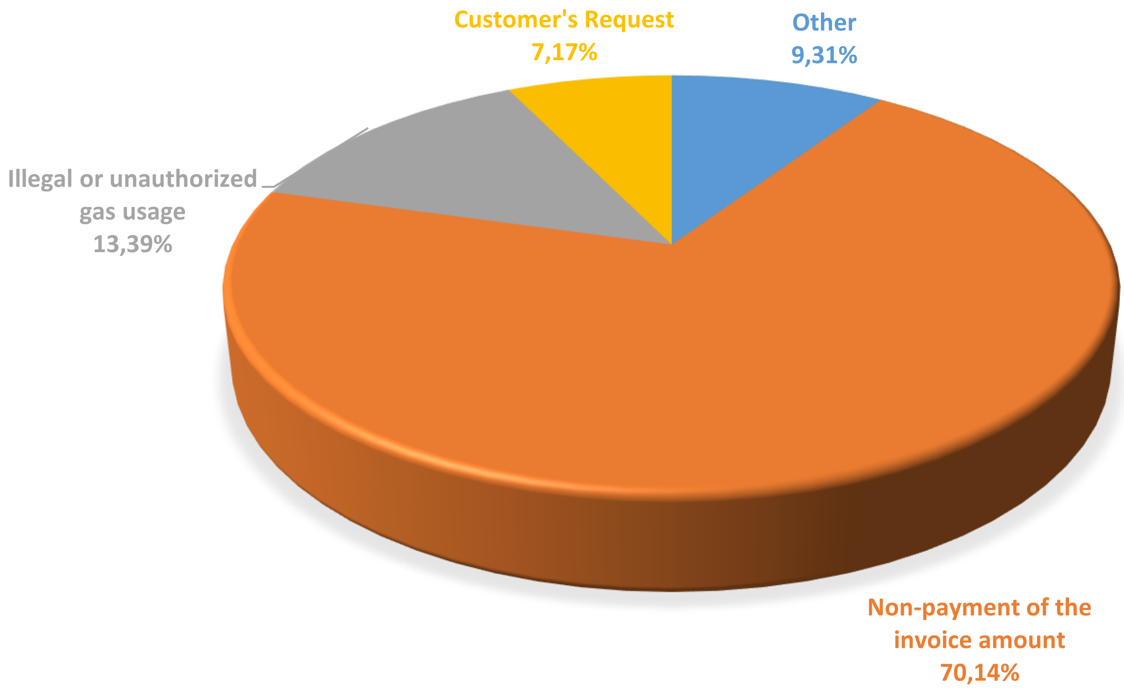

Figure 7.4: Reasons for Temporary Natural Gas Cut Offss in 2025 (%)

7.6 Applications and Complaints

Applications and complaints submitted by consumers to distribution companies can be classified into categories such as meters (measurement accuracy, malfunctions, erroneous readings, etc.), natural gas pressure levels, gas outages, complaints regarding certificate holders, and miscellaneous complaints.

Accordingly, a total of 850.519 applications and complaints were submitted to distribution companies in 2025; of these, approximately 53,93% consisted of "other complaints," 15,96% of complaints regarding gas supply interruptions, and 9,37% of complaints related to billing. The proportional distribution of the subjects of applications and complaints submitted by consumers to distribution companies in 2025 is shown in Figure 7.5.

Table 7.6: Distribution of Applications and Complaints Submitted by Consumers to Distribution Companies in 2025

Reasons for Complaint	Number of Complaints
Subscription-related complaints	15.205
Other complaints	458.685
Billing-related complaints	79.670
Price/Tariff-related complaints	5.751
Gas pressure level complaints	53.347
Gas outage complaints	135.701
Customer service-related complaints	31.145
Meter complaints	51.468
Average Resolution Time for Meter and Gas Opening Request Complaints	1.084
Certificate holder-related complaints	6.709
Network demand-related complaints	11.754
Grand Total	850.519

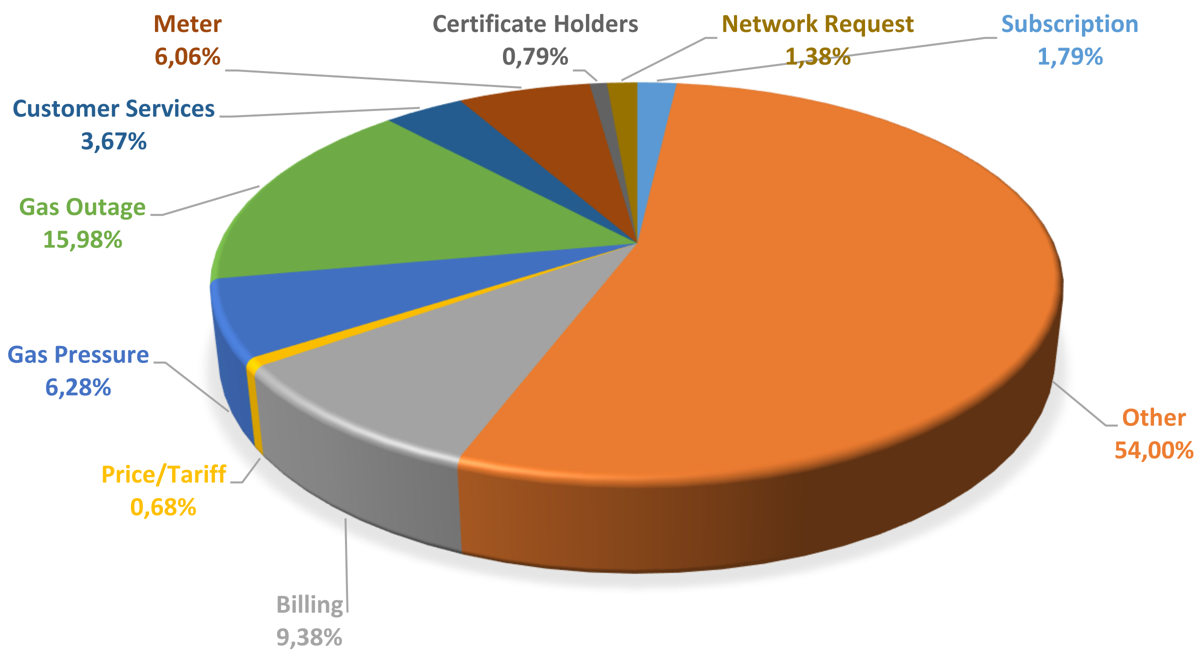

Figure 7.5: Subjects of Applications and Complaints Made by Consumers to Distribution Companies in 2025 (%)

7.7 Billing Disputes

Billing disputes submitted to distribution companies have been analyzed based on the number of disputes, the number of customers whose disputes were accepted, and the number of customers whose disputes were rejected; these data are presented in Figure 7.6. Accordingly, it is observed that 85.195 bills issued in 2025 were subject to dispute claims, and approximately 76,9% of these disputes were accepted by the distribution companies for re-evaluation.

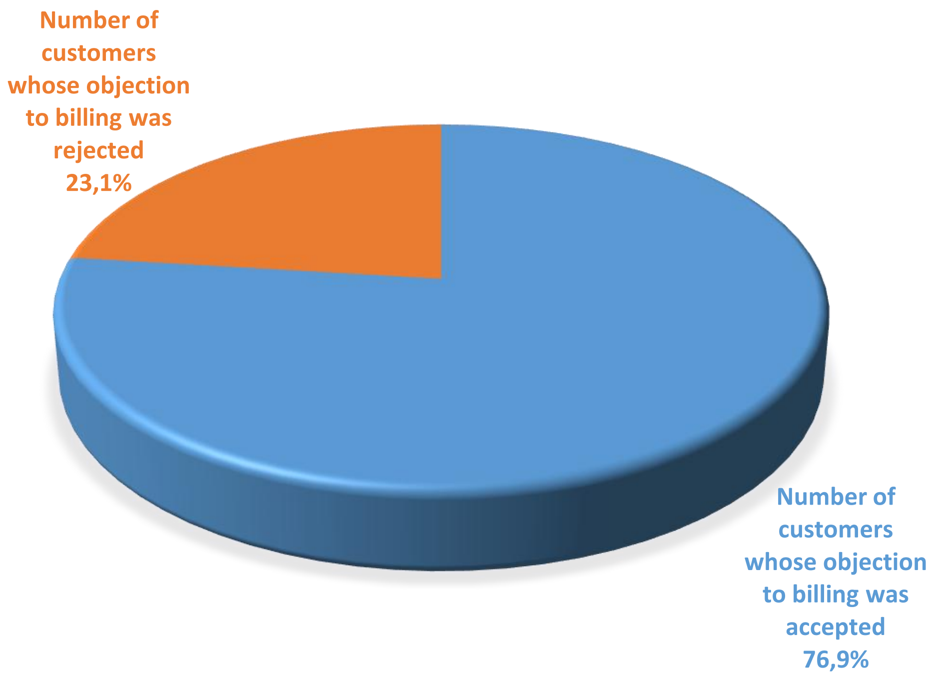

Figure 7.6: 2025 Consumers' Bill Dispute Applications (%)

7.8 Emergency Response

Distribution companies received a total of 1.309.056 emergency response notifications in 2025. Gas cut offs were implemented in 15.058 instances due to emergency situations. Distribution companies have 4.543 personnel and 1.218 vehicles available to respond to emergencies.

7.9 Employment

Employment data for distribution companies is presented in Table 7.7 below. Since the number of workers employed by contractor and subcontractor firms fluctuates continuously throughout the year, the peak figure recorded during the year has been used as the basis for this report. The number of permanent staff, on the other hand, represents the headcount as of the end of the year.

Table 7.7: Information on the Number of Personnel at Distribution Companies

Year	Number of Permanent Staff	Number of Contractor Personnel and Subcontractor Workers
2021	10.291	8.525
2022	11.121	9.021
2023	11.714	9.434
2024	11.381	10.781
2025	12.031	9.611

8. Consumption

The national natural gas consumption volume for 2025, which was estimated at 53.290.468.908 Sm³ in Board Decision No. 13232 dated 23.01.2025, amounted to 59.072.527.927,45 Sm³, representing a deviation of 10,85%. National natural gas consumption volumes by year are presented in Table 8.1.

Table 8.1: Total Natural Gas Consumption Volumes by Year (Million Sm³)

Year	Consumption (million Sm³)	Change compared to the previous year (%)
2010	37.411	6,22
2011	43.697	16,8
2012	45.242	3,53
2013	45.918	1,5
2014	48.717	6,1
2015	47.921	-1,63
2016	46.479	-3,01
2017	53.846	15,85
2018	49.210	-8,61
2019	45.282	-7,98
2020	48.267	6,59
2021	59.830	23,96
2022	53.201	-11,08
2023	50.211	-5,62
2024	53.226	6,00
2025	59.073	10,99

8.1 Sectoral Consumption

The national natural gas sectoral consumption volumes for 2025 are presented in Table 8.2.

Table 8.2: Distribution of Natural Gas Consumption by Sector in 2024 and 2025 (Million Sm^3)

Sector	2024	2025	2025 Share (%)	Change (%) 2024 → 2025
1. Energy Conversion Sector	**13.466,66**	**16.292,21**	**27,580**	**20,98**
1.1. Electric Power-Plants	11.061,19	13.808,59	23,376	24,84
1.2. Autoproducer Power-Plants	755,63	809,24	1,370	7,09
1.3. Heat and Electricity (CHP) Plants	53,80	166,73	0,282	209,89
1.4. Autoproducer Heat and Power Plants	1.558,19	1.469,21	2,487	-5,71
1.5. Heat Plants	0,00	0,00	0,000	0,00
1.6. Autoproducer Heat Plants	0,00	0,00	0,000	0,00
1.7. Other Cycle Industry Consumers	37,85	38,44	0,065	1,56
2. Energy Sector	**1.497,73**	**1.628,40**	**2,757**	**8,72**
2.1. Petroleum Refineries	1.346,74	1.392,17	2,357	3,37
2.2. Blast furnaces	0,31	0,31	0,001	-1,75
2.3. Consumed as fuel in Power, CHP and Heating Plants	2,22	2,29	0,004	3,38
2.4. Other Energy Sector Consumers	148,47	233,63	0,396	57,36
3. Transportation Sector	**317,50**	**412,10**	**0,698**	**29,80**
3.1. Vehicle fuel	96,99	94,01	0,159	-3,08
3.2. Pipeline transportation	219,95	316,90	0,536	44,08
3.3. Other Transportation Sector Consumers	0,56	1,19	0,002	114,54
4. Industry Sector	**13.359,69**	**13.824,88**	**23,403**	**3,48**
4.1. Wood processing	40,85	73,70	0,125	80,42
4.2. Alcohol and Alcohol products	18,83	17,51	0,030	-7,00
4.3. Nonmetallic minerals (glass, ceramics, cement, etc.)	1.196,29	1.265,61	2,142	5,79
4.4. Iron and Steel	1.424,40	1.645,97	2,786	15,56
4.5. Non-ferrous metal production and processing (chrome, copper, etc.)	351,20	386,65	0,655	10,09
4.6. Food and drinks	913,64	869,81	1,472	-4,80
4.7. Fertilizer	990,62	989,17	1,675	-0,15
4.8. Construction (construction products, road construction, etc.)	345,65	373,93	0,633	8,18
4.9. Paper, pulp and printing	170,13	166,83	0,282	-1,94
4.10. Chemistry (including petrochemistry)	1.773,25	1.878,39	3,180	5,93
4.11. Mining and quarrying	164,07	153,89	0,261	-6,21
4.12. Machinery industry	82,41	76,79	0,130	-6,82
4.13. Textile, leather and clothing industry	706,35	714,31	1,209	1,13
4.14. Tobacco and tobacco products	16,67	14,67	0,025	-11,97
4.15. Transportation industry (automotive, aircraft industry, etc.)	143,32	143,64	0,243	0,22
4.16. OSBs	4.169,88	4.240,98	7,179	1,70
4.17. Other Industry Sector Consumers	852,14	813,04	1,376	-4,59
5. Service Sector	**5.533,56**	**5.915,30**	**10,014**	**6,90**
5.1. Business	2.913,07	3.145,80	5,325	7,99
5.2. Government offices	2.239,74	2.338,99	3,960	4,43
5.3. Other Service Industry Consumers	380,75	430,52	0,729	13,07
6.1. Residential	**18.941,81**	**20.857,02**	**35,307**	**10,11**
6.2. Agriculture/Forestry	19,19	24,39	0,041	27,13
6.3. Livestock (fishing, poultry and barn farming, etc.)	40,44	44,60	0,075	10,28
6.4. Unspecified Other Industry Consumers	46,08	69,63	0,118	51,09
7.1. Losses	2,88	3,99	0,007	38,54
Grand Total	**53.225,55**	**59.072,53**	**100,000**	**10,99**

Note: While the quantities of gas consumed in the transmission network and storage facilities are not included in monthly natural gas sector reports, they are included in the consumption figures in annual reports.

When the sectoral distribution for 2025 is calculated in percentage terms, residential consumption stood at 35,31%, consumption for electricity generation at 27,58%, and industrial consumption at 23,40%. This breakdown, which also encompasses other key sectors, is illustrated in Figure 8.1.

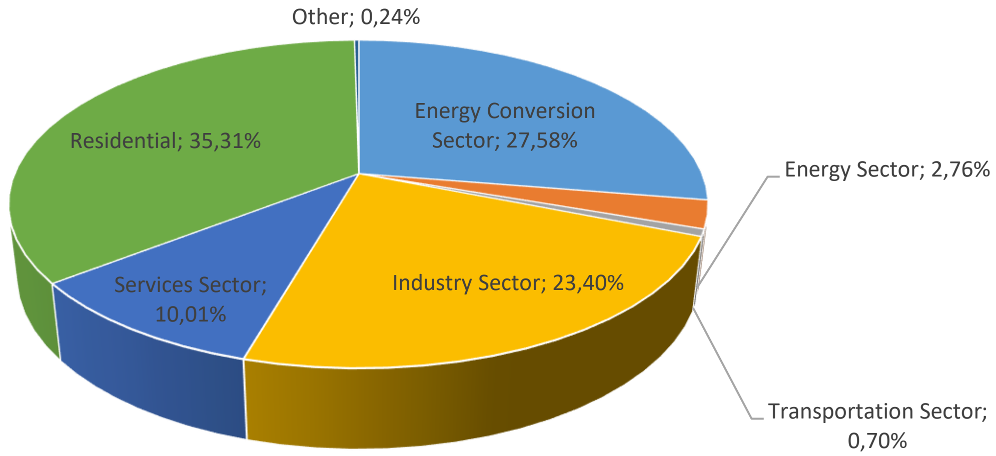

Figure 8.1: 2025 Natural Gas Consumption Distribution by Sector (%)

In 2025, a 10,99% increase in national natural gas consumption occurred compared to the previous year. A year-by-year comparison of consumption by sector is shown in Figure 8.2.

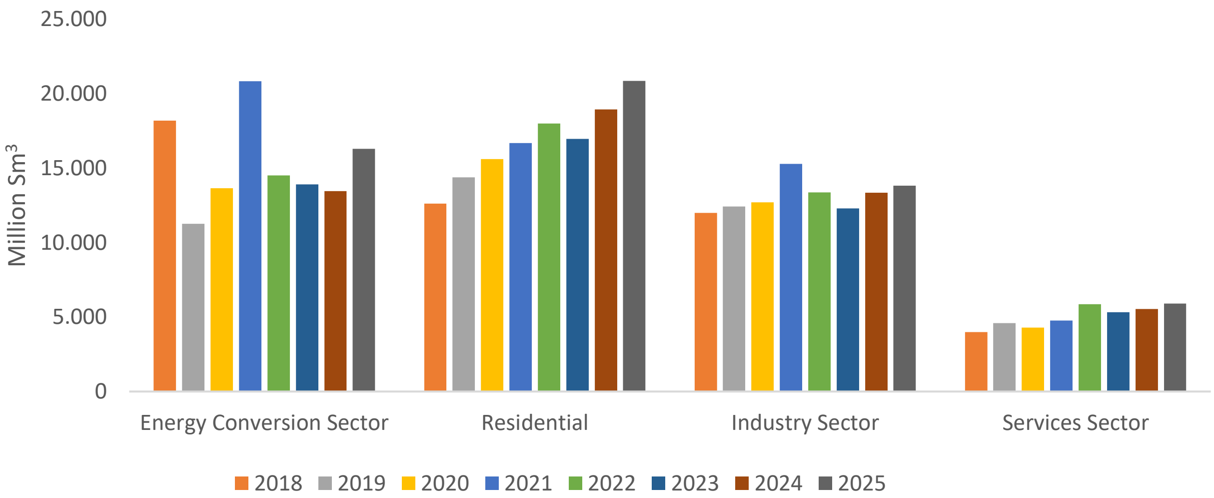

Figure 8.2: Comparison of Consumption by Sector Over the Years

The impact of sectoral consumption distributions on total consumption on a monthly basis in 2025 is shown in Figure 8.3. The lowest monthly natural gas consumption volume occurred in June, at 2.745 million Sm³. The highest monthly consumption occurred in January, at 7.660 million Sm³.

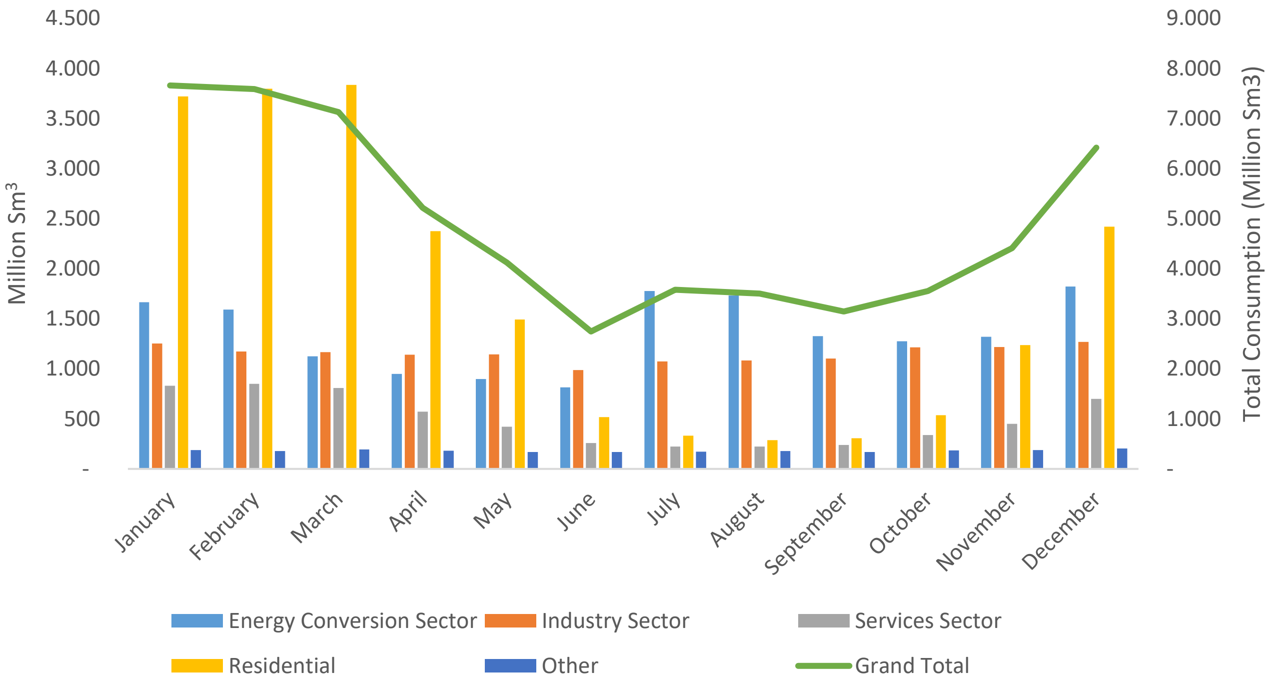

Figure 8.3: Impacts of Sectoral Consumption Distributions on Total Consumption on a Monthly Basis (Million Sm³)

The share of natural gas used for electricity generation within the total monthly consumption peaked at 49,66% in July. June recorded the highest share for the industrial sector within monthly consumption volumes, at 35,99%. Throughout 2025, the share of monthly natural gas consumption by the industrial sector ranged between 15,46% and 39,99% of the total monthly consumption. The share of the residential sector in total monthly consumption exceeded 35% in January, February, March, April, May, and December, with March recording the highest share at 53,81%.

Figure 8.4 illustrates the monthly variation in sectoral consumption volumes for 2025. The residential sector exhibited the greatest volatility in monthly consumption levels; consumption in this sector dropped sharply from its peak to its lowest point between March and August, then rose rapidly during the October–January period. It was observed that natural gas consumption in the industrial sector generally remained stable on a monthly basis, whereas the volume of natural gas used for electricity generation increased during the second half of the year.

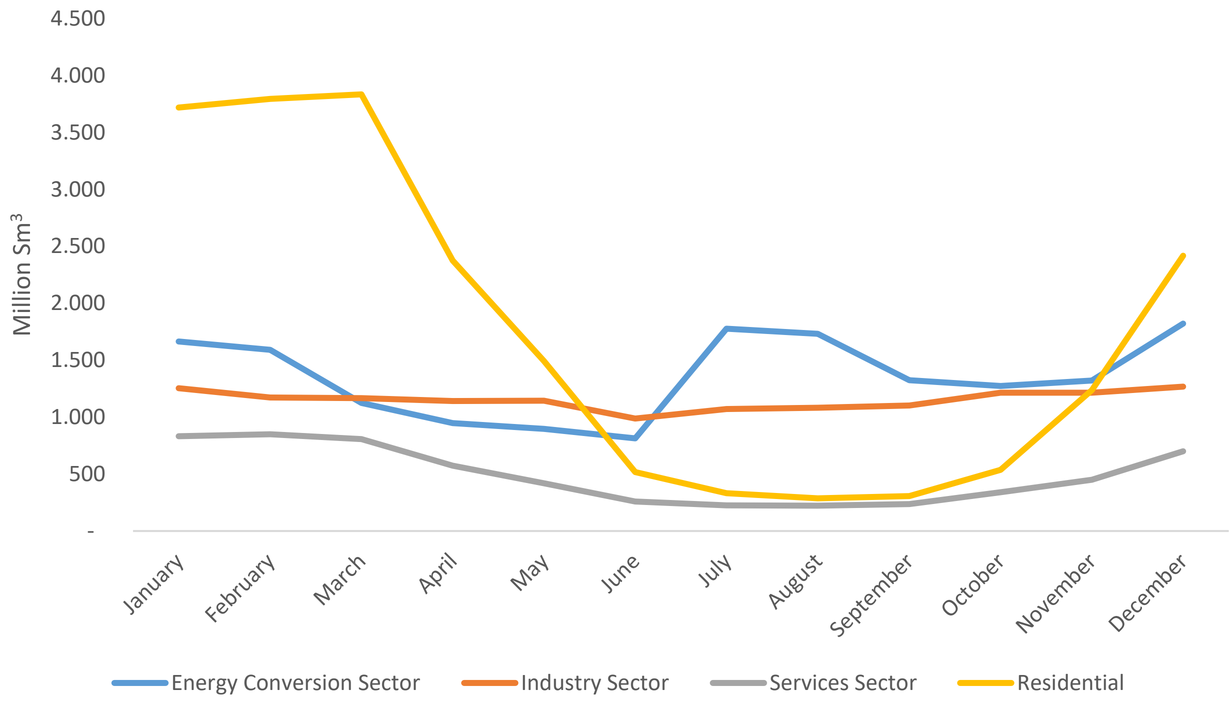

Figure 8.4: Monthly Natural Gas Sectoral Consumption Course in 2025 (Million Sm³)

8.2 Consumption by Province

Distribution of the national natural gas consumption - which amounted to 59.073 million Sm³ in 2025 - by province is presented in Table 8.3.

Table 8.3: 2025 Consumption Volumes by Province (Million Sm³)

Province Name	CNG	Auto LNG	Pipeline Gas	LNG	Auto CNG	Grand Total
ADANA	2,316		628,693	8,518		**639,527**
ADIYAMAN	0,908		134,797	2,881		**138,586**
AFYONKARAHİSAR	0,173		233,934	8,504		**242,612**
AĞRI	0,312		114,015	1,773		**116,100**
AKSARAY	1,211		209,296	0,808		**211,315**
AMASYA	0,128		142,460	0,257		**142,844**

Province Name	CNG	Auto LNG	Pipeline Gas	LNG	Auto CNG	Grand Total
ANKARA	1,092		4.763,043	15,244		**4.779,379**
ANTALYA	10,693		1.103,043	86,868		**1.200,604**
ARDAHAN			29,702	0,555		**30,257**
ARTVİN	3,016		23,496	1,438		**27,950**
AYDIN	2,649		272,249	8,885		**283,783**
BALIKESİR	2,734		1.920,976	12,224		**1.935,934**
BARTIN			96,969	0,176		**97,145**
BATMAN	1,099		174,720	2,741		**178,560**
BAYBURT			36,445	0,979		**37,424**
BİLECİK	0,175		532,375	3,170		**535,721**
BİNGÖL	0,160		75,330	1,326		**76,816**
BİTLİS	0,092		95,136	0,628		**95,855**
BOLU			223,772	12,507	0,047	**236,326**
BURDUR	1,063		117,205	0,896		**119,164**
BURSA	2,933		3.771,856	8,080	0	**3.782,871**
ÇANAKKALE	0,337		413,819	3,670		**417,827**
ÇANKIRI			113,986	2,616		**116,602**
ÇORUM	0,547		236,427	1,566		**238,539**
DENİZLİ	8,979		1.251,504	6,523		**1.267,006**
DİYARBAKIR	0,748		398,485	2,551		**401,784**
DÜZCE	0,271		328,317	0,868		**329,455**
EDİRNE	0,138		180,672	6,357		**187,167**
ELAZIĞ	1,094		279,901	0,704		**281,699**
ERZİNCAN			116,066	0,186		**116,252**
ERZURUM	0,280		414,885	2,675	1,550	**419,390**
ESKİŞEHİR	0,153		1.100,400	2,953		**1.103,506**
GAZİANTEP	0,793		940,200	3,620		**944,612**
GİRESUN	2,990		114,852	1,569		**119,410**
GÜMÜŞHANE			43,314	0,781		**44,096**
HAKKARİ	1,340		30,858	0,933		**33,131**
HATAY	7,023		1.274,505	18,881		**1.300,408**
IĞDIR			43,226	2,695		**45,921**
ISPARTA	2,846		180,112	4,482		**187,440**
İSTANBUL	0,946		8.443,539	62,962	0,002	**8.507,450**
İZMİR	3,669		4.641,930	11,970		**4.657,569**
KAHRAMANMARAŞ	1,872		534,306	6,584		**542,762**
KARABÜK			188,172	0,167		**188,339**
KARAMAN	0,202		126,639	0,480		**127,321**

Province Name	CNG	Auto LNG	Pipeline Gas	LNG	Auto CNG	Grand Total
KARS	1,374		86,762	2,117		**90,253**
KASTAMONU	0,0864		151,650	2,594		**154,331**
KAYSERİ	1,648		816,584	1,691	6,482	**826,405**
KIRIKKALE	0,493		1.855,021	2,253		**1.857,767**
KIRKLARELİ			1.521,594	7,856		**1.529,450**
KIRŞEHİR			107,928	0,094		**108,021**
KİLİS			44,134	1,360		**45,495**
KOCAELİ	0,523		4.121,521	5,334	0,058	**4.127,436**
KONYA	14,383		1.189,650	7,428		**1.211,462**
KÜTAHYA			573,347	3,148		**576,495**
MALATYA	0,761		353,656	0,928		**355,345**
MANİSA	1,908		605,490	13,725		**621,123**
MARDİN			210,797	2,595		**213,392**
MERSİN	1,170		924,332	10,292		**935,794**
MUĞLA	15,288		105,394	26,015		**146,697**
MUŞ			93,487	0,484		**93,971**
NEVŞEHİR	12,984		120,420	3,240		**136,644**
NİĞDE	1,028		138,797	2,823		**142,647**
ORDU	10,166		247,159	3,117		**260,443**
OSMANİYE	3,216	0,002	306,345	0,129	0,004	**309,695**
RİZE	34,178		120,738	0,612	0,120	**155,649**
SAKARYA	0,293		1.566,375	3,976	0,025	**1.570,670**
SAMSUN	2,941		1.985,338	5,715		**1.993,994**
SİİRT	0,003		56,495	1,057		**57,554**
SİNOP	0,169		53,888	0,925		**54,982**
SİVAS	0,099		358,467	4,495		**363,061**
ŞANLIURFA	1,125		230,705	6,845		**238,675**
ŞIRNAK	0,095		32,625	3,053		**35,772**
TEKİRDAĞ	2,343		1.862,852	17,292		**1.882,487**
TOKAT	0,106		207,814	1,409		**209,330**
TRABZON	3,910		226,961	5,154		**236,025**
TUNCELİ			21,613			**21,613**
UŞAK			243,888	3,207		**247,095**
VAN	5,988		307,296	1,613		**314,898**
YALOVA			186,488	0,482		**186,970**
YOZGAT	0,112		171,707	1,278		**173,098**
ZONGULDAK			698,523	3,813		**702,336**

Province Name	CNG	Auto LNG	Pipeline Gas	LNG	Auto CNG	Grand Total
INTERNAL CONSUMPTION GAS			277,741			**277,741**
TERMINAL FUEL GAS				121,255		**121,255**
Grand Total	**181,373**		**58.279,208**	**603,654**	**8,292**	**59.072,526**

8.3 Natural Gas Sales Volumes by License Holders to End Consumers

In 2025, sales of natural gas to end-users were carried out as follows: 39,77% by import license holders, 57,43% by distribution license holders, 2,48% by wholesale license holders, and 0,32% by compressed natural gas license holders. The volumes and shares of these sales on a company-by-company basis are presented in Tables 8.4, 8.5, 8.6, 8.7, and 8.8.

Table 8.4: Natural Gas Sales Volumes to End Consumers by Import License Holders in 2025 (Million Sm³)

Company Name	Sales Volume	Share(%)
BOTAŞ BORU HATLARI İLE PETROL TAŞIMA ANONİM ŞİRKETİ	23.307,76	99,88
GAZPORT DOĞALGAZ TOPTAN SATIŞ TİCARET VE SANAYİ ANONİM ŞİRKETİ	22,59	0,10
NATURELGAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	2,70	0,01
SHELL ENERJİ ANONİM ŞİRKETİ	1,26	0,01
ŞİŞECAM ENERJİ ANONİM ŞİRKETİ	0,40	0,00
Grand Total	**23.334,72**	**100**

Table 8.5: Natural Gas Sales Volumes to End-Consumers by Compressed Natural Gas License Holders in 2025 (Million Sm³)

Company Name	Sales Volume	Share(%)
NATURELGAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	122,20	64,79
OR-CAN DOĞAL GAZ TOPTAN SATIŞ DAĞITIM ANONİM ŞİRKETİ	11,43	6,06
ATAERK ENERJİ İNŞAAT ANONİM ŞİRKETİ	6,48	3,44
İNCİ ENERJİ LPG DOĞALGAZ VE AKARYAKIT SANAYİ TİCARET LİMİTED ŞİRKETİ	6,24	3,31
GENİA TURKEY ENERJİ YATIRIMLARI VE TURİZM ANONİM ŞİRKETİ	5,95	3,15
YILMAZLAR SINAİ VE TIBBİ GAZLAR PAZARLAMA SANAYİ VE TİCARET LİMİTED ŞİRKETİ	4,04	2,14

Company Name	Sales Volume	Share(%)
TEZ OKSİJEN SANAYİ VE TİCARET ANONİM ŞİRKETİ	3,68	1,95
ÇEKİCİ GAZ VE YANGIN EKİPMANLARI SANAYİ VE TİCARET ANONİM ŞİRKETİ	3,66	1,94
KARABÖRK GAZ PAZARLAMA VE TİCARET LİMİTED ŞİRKETİ	2,83	1,50
CNG GAZ SANAYİ VE TİCARET ANONİM ŞİRKETİ	2,83	1,50
ERD CNG ENDÜSTRİYEL GAZLAR SANAYİ VE TİCARET ANONİM ŞİRKETİ	2,82	1,49
CNGAZ PETROL ÜRÜNLERİ DAĞITIM VE TİCARET ANONİM ŞİRKETİ	2,59	1,37
METE TURİZM TİCARET SANAYİ İTHALAT İHRACAT LİMİTED ŞİRKETİ	2,34	1,24
AY-TEK DOĞALGAZ DÖNÜŞÜM SİSTEMLERİ MÜHENDİSLİK İNŞAAT VE TAAHHÜT SANAYİ VE TİCARET LİMİTED ŞİRKETİ	2,05	1,09
DOĞALHAYAT PETROL ÜRÜNLERİ, CNG, GAZ, İNŞAAT, GIDA SANAYİ VE TİCARET LİMİTED ŞİRKETİ	2,01	1,07
AKPET GAZ ANONİM ŞİRKETİ	1,93	1,02
ERZURUM ENERJİ ÜRETİM DAĞITIM DOĞALGAZ PETROL METAL TAŞIMACILIK SANAYİ VE TİCARET ANONİM ŞİRKETİ	1,55	0,82
HABAŞ SINAİ VE TIBBİ GAZLAR İSTİHSAL ENDÜSTRİSİ ANONİM ŞİRKETİ	1,43	0,76
KAYSERİ ULAŞIM TURİZM İNŞAAT TAAHHÜT PROJE MÜŞAVİRLİK TELEKOMÜNİKASYON SANAYİ VE TİCARET A.Ş.	1,19	0,63
SARP CNG ENDÜSTRİYEL GAZLAR SANAYİ VE TİCARET ANONİM ŞİRKETİ	1,00	0,53
ARAR PETROL ANONİM ŞİRKETİ	0,15	0,08
BEWER GRUP ENERJİ ANONİM ŞİRKETİ	0,09	0,05
TEZ ENERJİ SANAYİ TİCARET LİMİTED ŞİRKETİ	0,09	0,05
SERALGAZ SANAYİ GAZLARI TİCARET ANONİM ŞİRKETİ	0,01	0,00
TİNSA TIBBİ VE SINAİ GAZLAR SANAYİ VE TİCARET LİMİTED ŞİRKETİ	0,01	0,00
Grand Total	**188,60**	**100**

Table 8.6: Natural Gas Sales Volumes by Wholesale License Holders to End Consumers in 2025 (Million Sm^3)

Company Name	Sales Volume	Share(%)
SOCAR ENERJİ TİCARET ANONİM ŞİRKETİ	754,47	51,79
İPRAGAZ ANONİM ŞİRKETİ	143,85	9,87
TÜRKİYE PETROLLERİ ANONİM ORTAKLIĞI	131,34	9,02
OMV ENERJİ TİCARET ANONİM ŞİRKETİ	125,69	8,63

Company Name	Sales Volume	Share(%)
AYGAZ DOĞAL GAZ TOPTAN SATIŞ ANONİM ŞİRKETİ	81,88	5,62
THRACE BASIN NATURAL GAS (TÜRKİYE) CORPORATION TÜRKİYE-ANKARA ŞUBESİ	58,28	4,00
AKPET GAZ ANONİM ŞİRKETİ	41,31	2,84
HABAŞ SINAİ VE TIBBİ GAZLAR İSTİHSAL ENDÜSTRİSİ ANONİM ŞİRKETİ	40,51	2,78
OR-CAN DOĞAL GAZ TOPTAN SATIŞ DAĞITIM ANONİM ŞİRKETİ	39,80	2,73
HAS-GAZ LPG DAĞITIM VE METAL SANAYİ TİCARET ANONİM ŞİRKETİ	19,34	1,33
ENERJİ GRUP SIVI DOĞAL GAZ LNG AKARYAKIT PETROL ÜRÜNLERİ TOPTAN SATIŞ ANONİM ŞİRKETİ	14,40	0,99
LİKİTGAZ DAĞITIM VE ENDÜSTRİ ANONİM ŞİRKETİ	6,05	0,42
Grand Total	**1.456,93**	**100**

Table 8.7: Natural Gas Sales Volumes by Natural Gas Distribution License Holders to End Consumers in 2025 (Million Sm^3)

Company Name	Sales Volume	Share(%)
İGDAŞ İSTANBUL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	7.296,35	21,66
BAŞKENT DOĞALGAZ DAĞITIM GAYRİMENKUL YATIRIM ORTAKLIĞI ANONİM ŞİRKETİ	3.233,05	9,60
İZMİR DOĞALGAZ DAĞITIM TİCARET VE TAAHHÜT ANONİM ŞİRKETİ	1.457,27	4,33
PALGAZ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	1.406,08	4,17
BURSA ŞEHİRİÇİ DOĞAL GAZ DAĞITIM TİCARET VE TAAH. ANONİM ŞİRKETİ	1.158,32	3,44
TRAKYA BÖLGESİ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.082,50	3,21
AKSA ÇUKUROVA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.057,87	3,14
GAZDAŞ GAZİANTEP DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	984,33	2,92
İZGAZ İZMİT GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	945,94	2,81
ENERYA KONYA GAZ DAĞITIM ANONİM ŞİRKETİ	839,21	2,49
AKSA BİLECİK BOLU DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	733,01	2,18
KAYSERİGAZ KAYSERİ DOĞALGAZ DAĞITIM PAZARLAMA VE TİCARET ANONİM ŞİRKETİ	690,63	2,05
AKSA SAKARYA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	608,55	1,81
ESGAZ ESKİŞEHİR ŞEHİRİÇİ DOĞAL GAZ DAĞITIM TİCARET VE TAAH. ANONİM ŞİRKETİ	510,55	1,52

Company Name	Sales Volume	Share(%)
KARGAZ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	466,26	1,38
ENERYA DENİZLİ GAZ DAĞITIM ANONİM ŞİRKETİ	436,71	1,30
AKSA DÜZCE EREĞLİ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	411,53	1,22
AKSA ORDU GİRESUN DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	409,04	1,21
ARMADAŞ ARSAN MARAŞ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	381,49	1,13
PALEN ENERJİ DOĞAL GAZ DAĞITIM END. VE TİCARET ANONİM ŞİRKETİ	371,59	1,10
SAMGAZ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	370,31	1,10
DİYARBAKIR DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	366,91	1,09
AKSA KARADENİZ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	347,70	1,03
AKSA MANİSA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	340,67	1,01
AKSA MALATYA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	335,66	1,00
AKSA TOKAT AMASYA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	316,50	0,94
AKSA BALIKESİR DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	308,68	0,92
AKSA VAN DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	307,30	0,91
MARMARA YALOVA GAZ DAĞITIM ANONİM ŞİRKETİ	300,64	0,89
TOROSGAZ KÜTAHYA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	297,84	0,88
AKSA ELAZIĞ DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	279,90	0,83
TOROSGAZ ISPARTA BURDUR DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	276,45	0,82
ENERYA AYDIN GAZ DAĞITIM ANONİM ŞİRKETİ	265,92	0,79
AKSA SİVAS DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	259,94	0,77
ENERYA KAPADOKYA GAZ DAĞITIM A.Ş.	250,02	0,74
ENERYA ANTALYA GAZ DAĞITIM A.Ş.	246,81	0,73
KIRGAZ KIRIKKALE-KIRŞEHİR DOĞAL GAZ DAĞITIM PAZ. VE TİCARET ANONİM ŞİRKETİ	241,08	0,72
AKSA ŞANLIURFA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	230,70	0,68
MARMARA ÇORLU GAZ DAĞITIM ANONİM ŞİRKETİ	230,07	0,68
AKSA AFYON DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	216,19	0,64
ÇORUM DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	213,62	0,63
AKSA ÇANAKKALE DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	200,59	0,60
AKMERCAN BATIKAR DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	198,89	0,59
DOĞUGAZ BİTLİS MUŞ DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	188,62	0,56
AKSA SİİRT BATMAN DOĞALGAZ DAĞITIM A.Ş.	182,86	0,54
SÜRMELİ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	161,24	0,48

Company Name	Sales Volume	Share(%)
T DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	138,97	0,41
ENERYA AKSARAY GAZ DAĞITIM A.Ş.	138,09	0,41
AKMERCAN ADIYAMAN DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	128,37	0,38
AKSA MUSTAFAKEMALPAŞA SUSURLUK KARACABEY DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	126,49	0,38
UDAŞ UŞAK DOĞALGAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	124,05	0,37
AKSA BANDIRMA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	120,26	0,36
DOĞUGAZ KARS ARDAHAN DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	116,46	0,35
ENERYA ERZİNCAN GAZ DAĞITIM ANONİM ŞİRKETİ	115,75	0,34
AKMERCAN DELTA DOĞALGAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	107,06	0,32
AKMERCAN MUĞLA DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	105,39	0,31
AKMERCAN MARDİN DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	103,59	0,31
AKSA AĞRI DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	101,66	0,30
ENERYA KARAMAN GAZ DAĞITIM ANONİM ŞİRKETİ	96,76	0,29
AKSA GEMLİK DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	91,38	0,27
SELÇUK DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	81,93	0,24
AKSA GÜMÜŞHANE BAYBURT DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	79,76	0,24
ENERYA EREĞLİ GAZ DAĞITIM ANONİM ŞİRKETİ	79,50	0,24
ARH BİNGÖL DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	75,33	0,22
AKMERCAN HAKKARİ ŞIRNAK DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	63,48	0,19
POLGAZ POLATLI DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	62,38	0,19
AKMERCAN SİNOP DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	53,89	0,16
DOĞUGAZ IĞDIR DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	43,23	0,13
AKMERCAN GEPA DOĞALGAZ DAĞITIM SAN.VE TİC.LTD.ŞTİ.	38,49	0,11
BAHÇEŞEHİR GAZ DAĞITIM ANONİM ŞİRKETİ	31,10	0,09
AKMERCAN ARTVİN DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	23,50	0,07
AKMERCAN TUNCELİ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	21,61	0,06
KIZILCAHAMAM DOĞALGAZ DAĞITIM ANONİM ŞİRKETİ	9,40	0,03
Grand Total	**33.693,28**	**100**

Table 8.8: Sales Shares of the Top 10 Companies Selling the Most Natural Gas to End-Consumers Nationwide in 2025 (Million Sm^3)

Company Name	Sales Volume	Share(%)
BOTAŞ BORU HATLARI İLE PETROL TAŞIMA ANONİM ŞİRKETİ	23.307,76	39,72
İGDAŞ İSTANBUL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	7.296,35	12,44
BAŞKENT DOĞALGAZ DAĞITIM GAYRİMENKUL YATIRIM ORTAKLIĞI ANONİM ŞİRKETİ	3.233,05	5,51
İZMİR DOĞALGAZ DAĞITIM TİCARET VE TAAHHÜT ANONİM ŞİRKETİ	1.457,27	2,48
PALGAZ DOĞAL GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	1.406,08	2,40
BURSA ŞEHİRİÇİ DOĞAL GAZ DAĞITIM TİCARET VE TAAH. ANONİM ŞİRKETİ	1.158,32	1,97
TRAKYA BÖLGESİ DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.082,50	1,84
AKSA ÇUKUROVA DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	1.057,87	1,80
GAZDAŞ GAZİANTEP DOĞAL GAZ DAĞITIM ANONİM ŞİRKETİ	984,33	1,68
İZGAZ İZMİT GAZ DAĞITIM SANAYİ VE TİCARET ANONİM ŞİRKETİ	945,94	1,61
Total	**41.929,48**	**71,46**

Transportation services are provided by the natural gas distribution company in the relevant city to eligible consumers located within the distribution zone who purchase natural gas from suppliers. The annual transportation volumes handled by the distribution companies are shown in Table 8.9.

Table 8.9: Gas Volumes Transported by Distribution Companies (Million Sm^3)

Year	Transported Quantity
2021	26.987,96
2022	20.337,17
2023	18.927,38
2024	19.075,41
2025	21.154,99

Figure 8.5 presents a comparison of the natural gas sales volumes made by natural gas distribution companies to their subscribers and eligible consumers in 2025 against the natural

gas transportation volumes provided to customers located within their distribution zones who purchase natural gas from other suppliers.

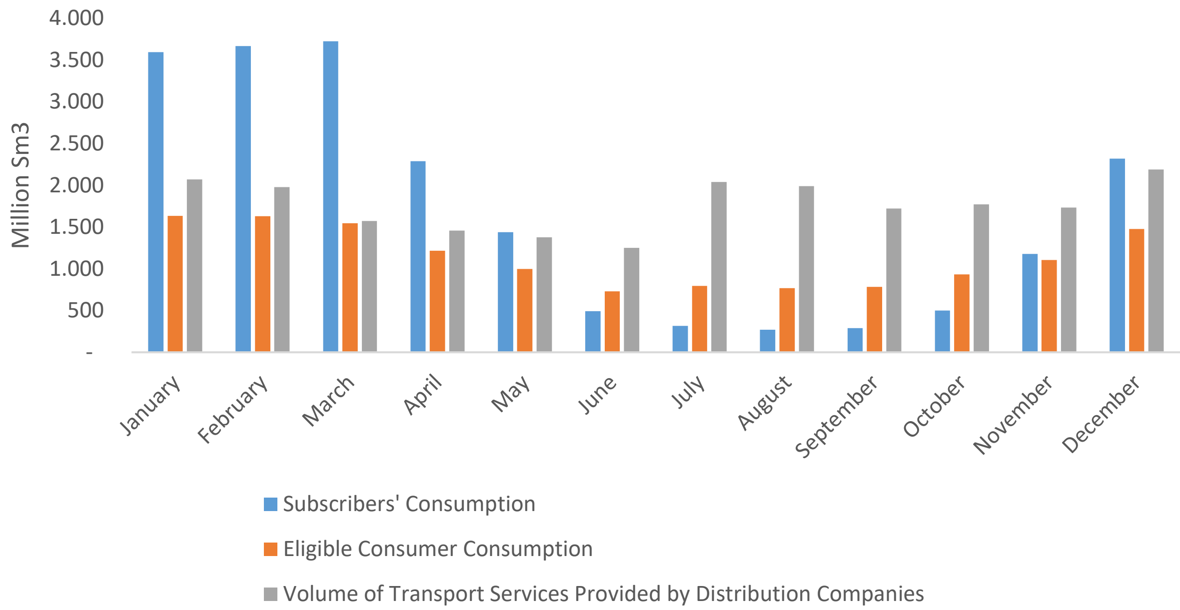

Figure 8.5: Total Pipeline Gas Consumption Volume in Natural Gas Distribution Zones for the Year 2025 (Million Sm³)

9. Tariff and Pricing

9.1 Türkiye

Table 9.1 presents the average unit prices of natural gas sold by distribution and supply companies to residential and industrial consumers in 2025, as well as the components constituting these average unit prices.

Table 9.1: Average Unit Prices of Natural Gas Sold by Distribution and Supply Companies to Residential and Industrial Consumers in 2025 (TL/Sm³)

		Gas Price	System Usage Fee	SCT Amount	VAT Amount	Total
2025 1st Half	**Residential**	5,631275	2,623598	0,118700	1,674715	10,048287
	Industrial	12,609483	0,848122	0,118700	2,715261	16,291566
2025 2nd Half	**Residential**	7,771789	3,083730	0,137300	2,198564	13,191382
	Industrial	15,000000	0,936735	0,137300	3,214807	19,288842

* Calculation is based on the average system usage fees applicable to the 0–100.000 Sm³ consumption tier for residential use and the 1.000.001–10.000.000 Sm³ tier for industrial use..

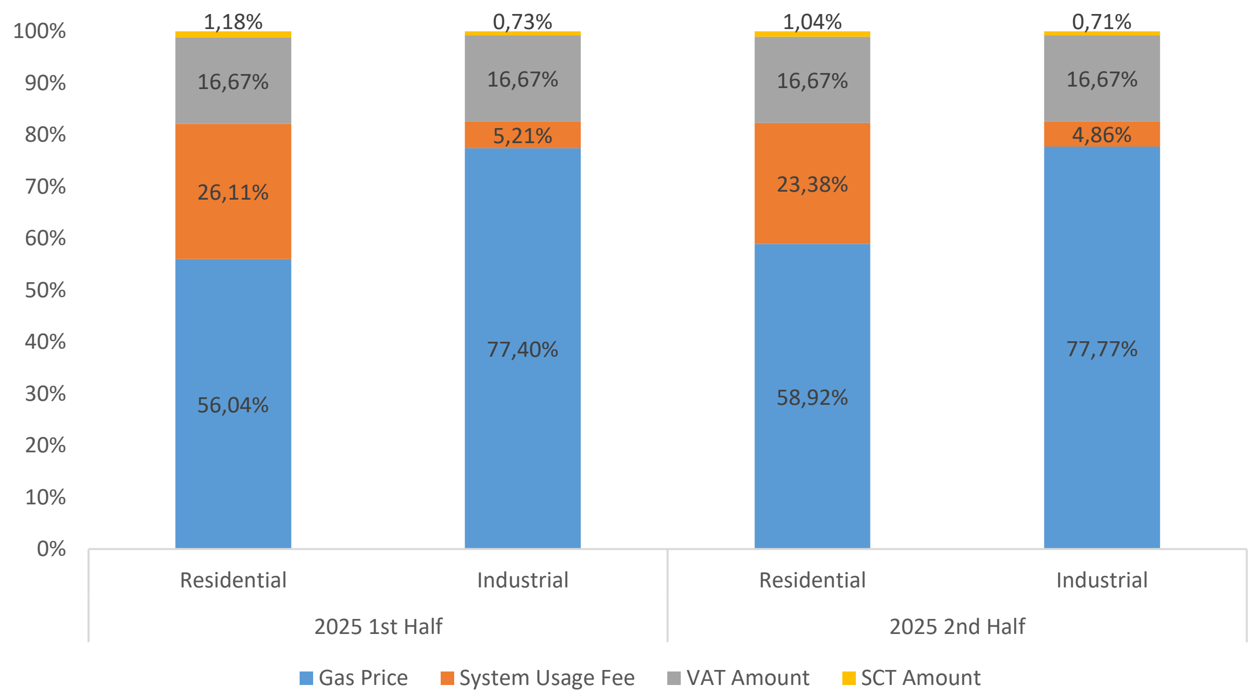

Figure 9.1: Price Formation of Natural Gas Sold to Residential and Industrial Consumers by Distribution and Supply Companies in 2025