



THE INDUSTRIAL GASES BUSINESS IN KAZAKHSTAN

*A multi-client report
2008*

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[1.0] INTRODUCTION

[1.1] Background

Spiritus is the leading provider of knowledge on the global industrial gases business. Our consultants average 25 years experience within the industry and have a wealth of knowledge and understanding of various disciplines of the industrial gases business – including onsite supply schemes, bulk and cylinder gases, as well as country and strategic/business development roles.

This report has been prepared by Spiritus and relevant consultants who have had direct involvement in the country being researched and will provide the subscriber with a good overview of the size and structure of the gases business in Kazakhstan.

This report provides a “high level” or “senior management level” of understanding of the current state and size of the business. Spiritus recommends that deeper analysis will be required to identify future opportunities that may exist in the country or to address specific issues or topics of interest.

[1.2] Objectives

The objective of the study is to provide the subscriber with an independent overview of the structure of the industrial gases business in Kazakhstan. This will be achieved by the following:

- Providing an overview of the supply structure in Kazakhstan;
- Providing company profiles on the main gas companies in the country;
- Providing an overview of the demand for gases in the country.

[1.3] Definitions

1.3.1 Size of Market

Our definition of the size of the industrial gases business is based on the value of the supply of industrial gases and related services to the end-user and does not include third party equipment sales or plants owned and operated by the end-user. We have also attempted to address the possible double-counting that occurs with some wholesaling business and so the data we have provided should represent the retail market.


















1.3.2 Exchange Rates

The base year for the report and the market data used within is 2008 (where not stated otherwise). We have used the following exchange rate for this year:

Kazakhstan Tenge (KZT) 122.3 : US\$ 1

1.3.3 Symbols

We have used the following symbols to represent gas companies and gas production assets:

 AP	 ASU	 Special gas facility
 Messer	 CO ₂	 Distribution Centres
 AL	 Helium	 N ₂ /O ₂ Generators
 Praxair	 Helium Trans-fill	 H ₂ Plants
 TN Sanso	 Acetylene	 Independent Merchant
 Linde		 Captive

We have also used the following abbreviations in the report:

OSP	Onsite supply and pipeline supply mode	LOX/GOX	Liquid/Gaseous Oxygen
Bulk	Bulk liquid mode	LIN/GAN	Liquid/Gaseous Nitrogen
JV	Joint Venture	LAr/GAr	Liquid/Gaseous Argon
SB	Plant on Stand-by	LCO ₂	Liquid Carbon Dioxide
NK	Detail not known	LHe	Liquid Helium
OP	Plant operating	LNG	Liquid Natural Gas
CL	Plant closed	H ₂	Hydrogen
UC	Plant under construction	O ₂	Oxygen
PL	Plant confirmed and planned	N ₂	Nitrogen
Tpd	Metric tonnes per day	CO ₂	Carbon Dioxide
Nm ³ /hr	Normal cubic metres per hour	m	million
		Bn	billion

[2.0] THE INDUSTRIAL GASES BUSINESS IN KAZAKHSTAN (SUMMARY)

Total Value:
US\$64 million

Merchant Gases Demand, 2008
(tons per day)

