



Update on OIL AND GAS SECURITY

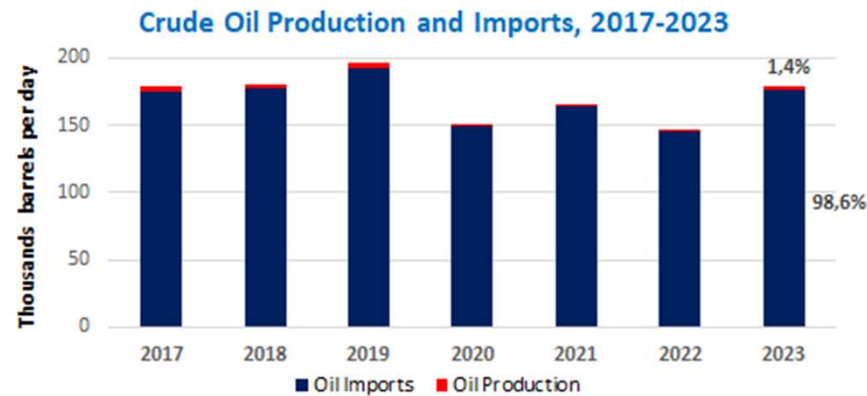
CHILE

The 8th APEC Oil and Gas Security Network Forum
Hong Kong, China

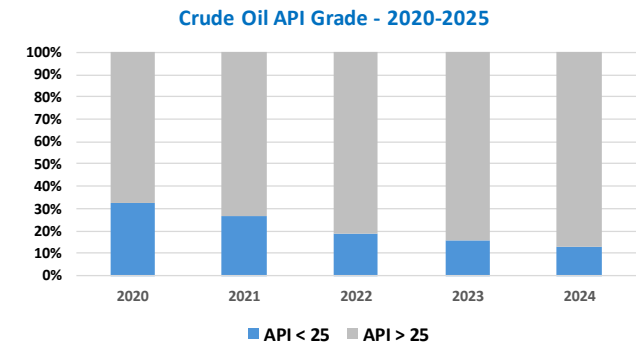
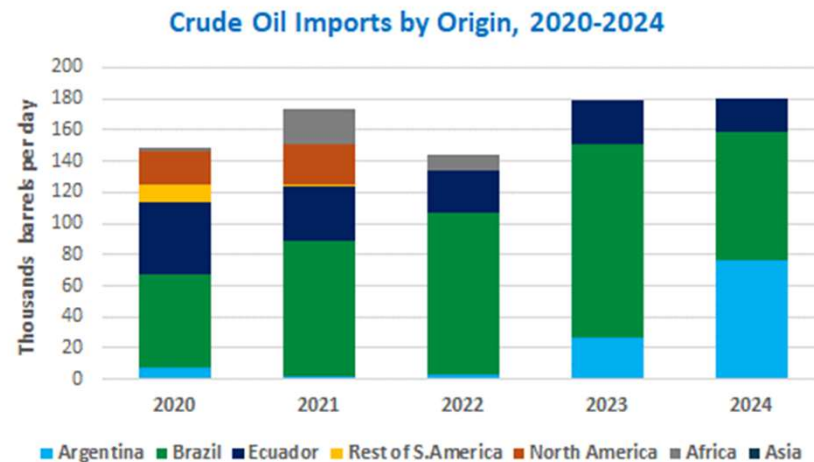
Fuels and New Energies Division
Ministry of Energy
Chile

Petroleum Security: Oil Supply

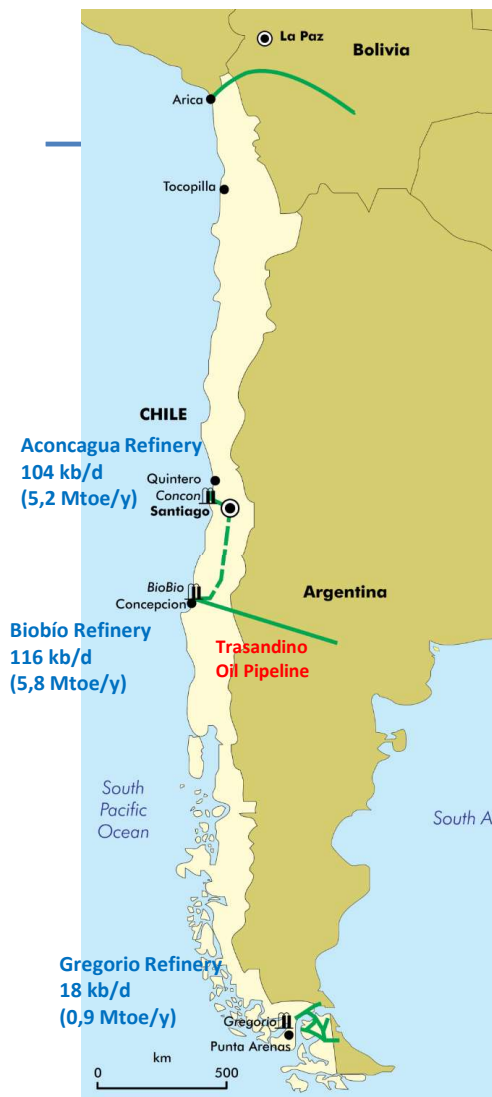
High dependency on petroleum imports



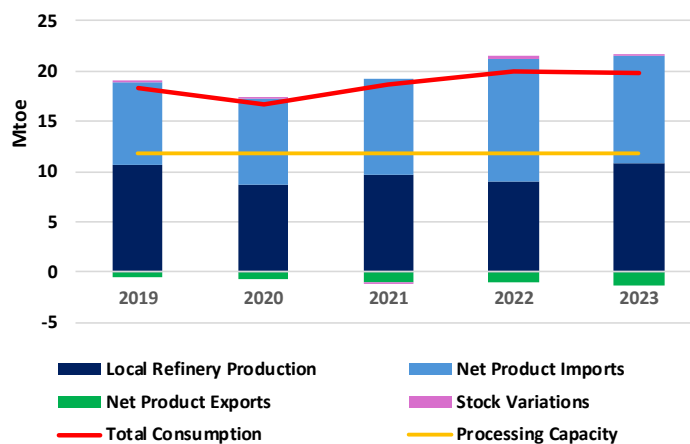
Argentina's new role in Chile's petroleum supply



Petroleum Security: Refinery Production

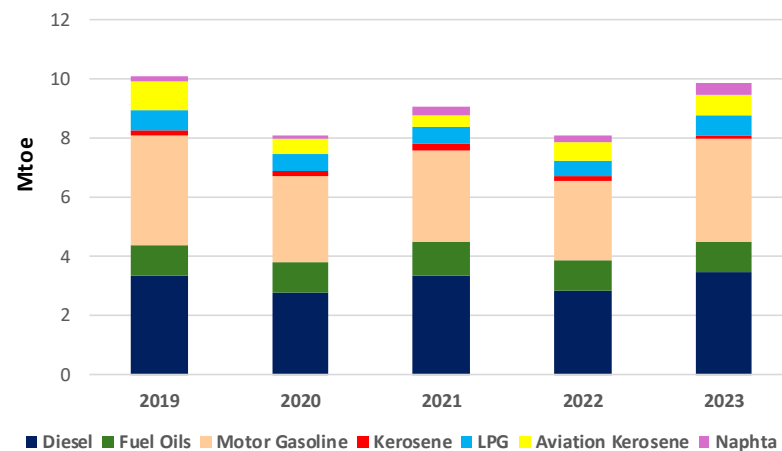


Refinery Products: Consumption and Production, 2019-2023



Relevance of Fuels Imports to satisfy local demand

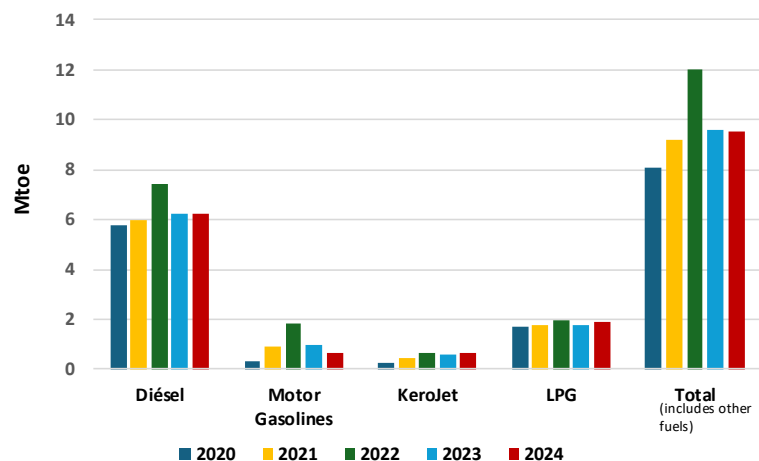
Refinery Production, 2019-2023



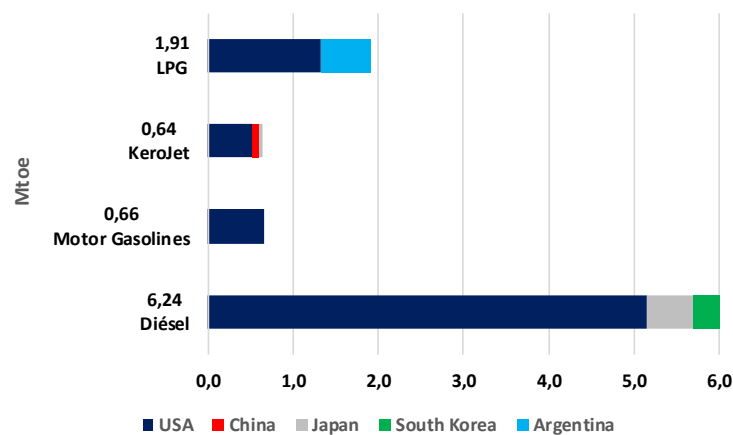
Strategic role of State-owned ENAP

Petroleum Security: Fuels Imports

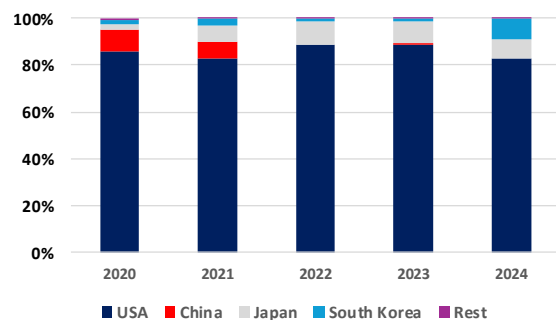
Oil Products Imports, 2020-2024



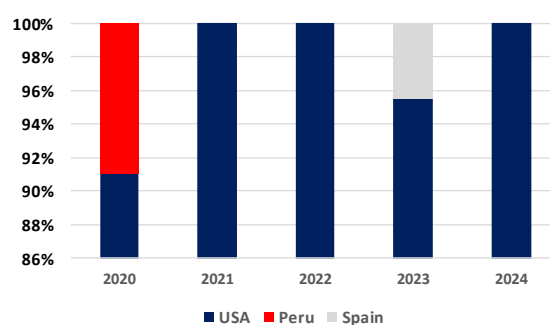
Oil Products Imports by Origin, 2024



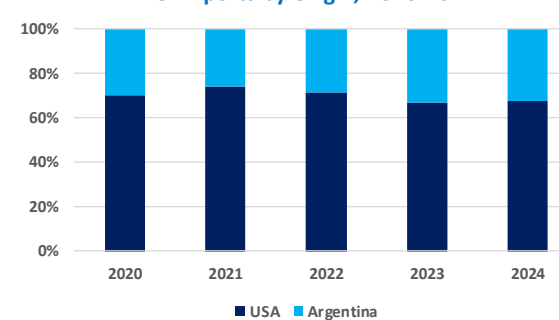
Diesel Imports by Origin, 2020-2024



Motor Gasoline Imports by Origin, 2020-2024

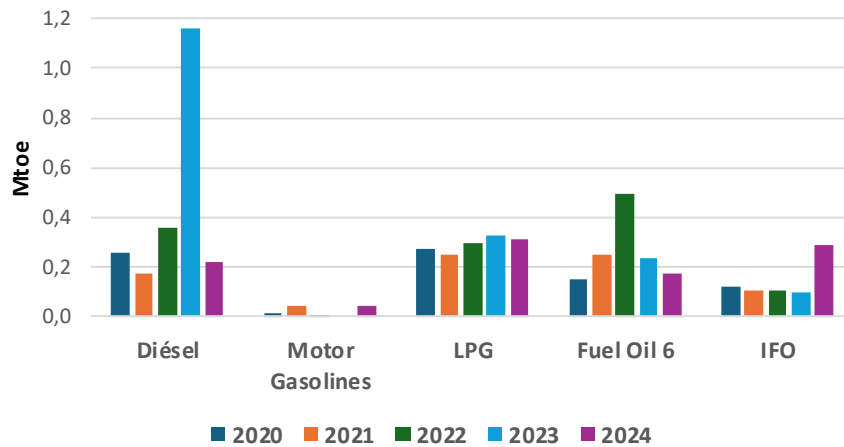


LPG Imports by Origin, 2020-2024

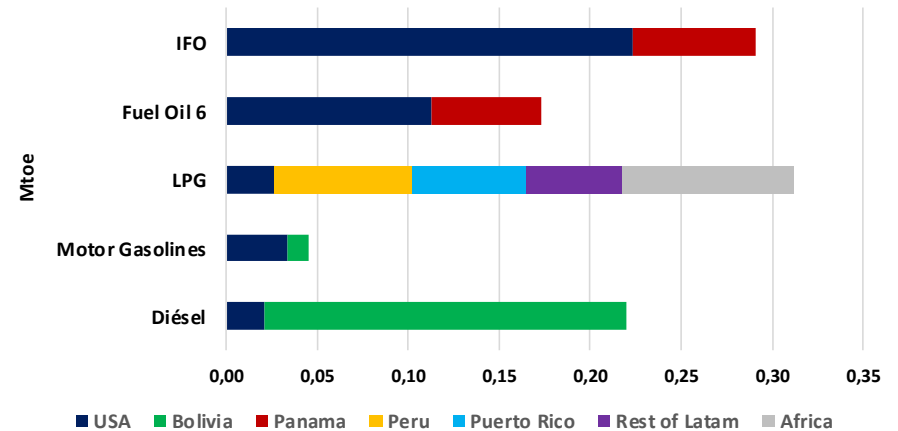


Petroleum Security: Exports

Petroleum Products Exports, 2020-2024



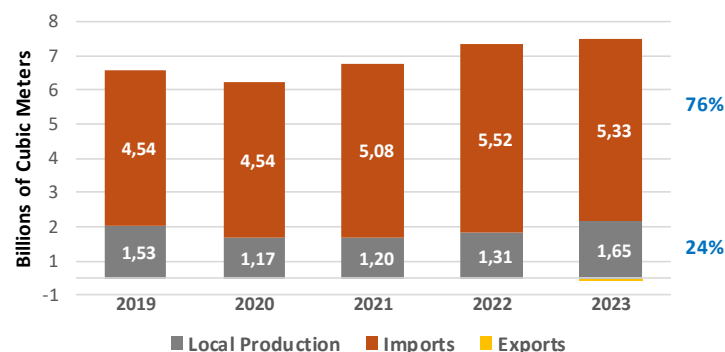
Oil Products Exports by Destination, 2024



Natural Gas Security: Infrastructure and Supply



Natural Gas Production, Imports, Exports 2019-2023



LNG Regasification Terminals

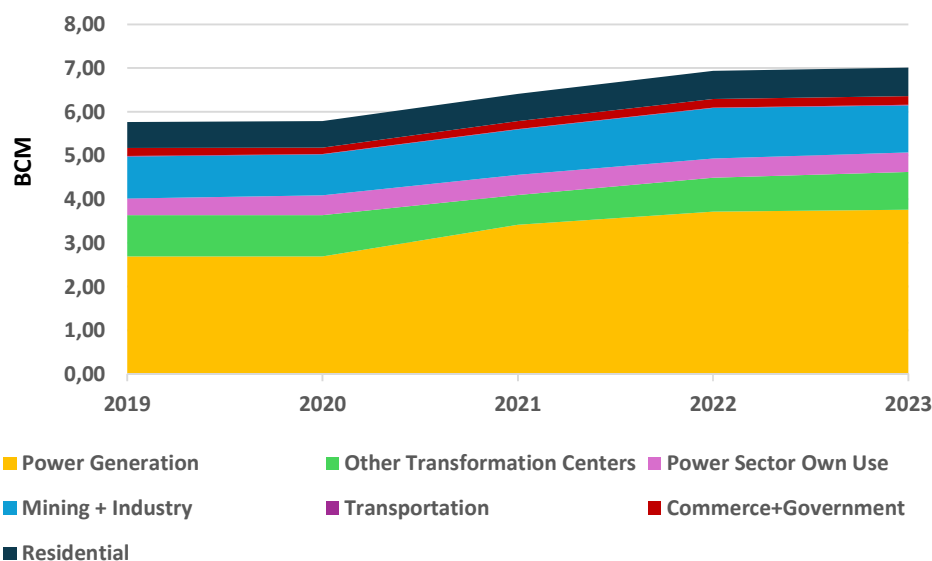
Terminal	Region	Regasif. Capacity [Mcm/d]	Utilization Rate 2024 (%)	LNG Storage Capacity [cu. m]
GNL Mejillones	Antofagasta	5,5	24,3%	168.000
GNL Quintero	Valparaíso	15	21,8%	334.000

International Gas Transportation Pipelines

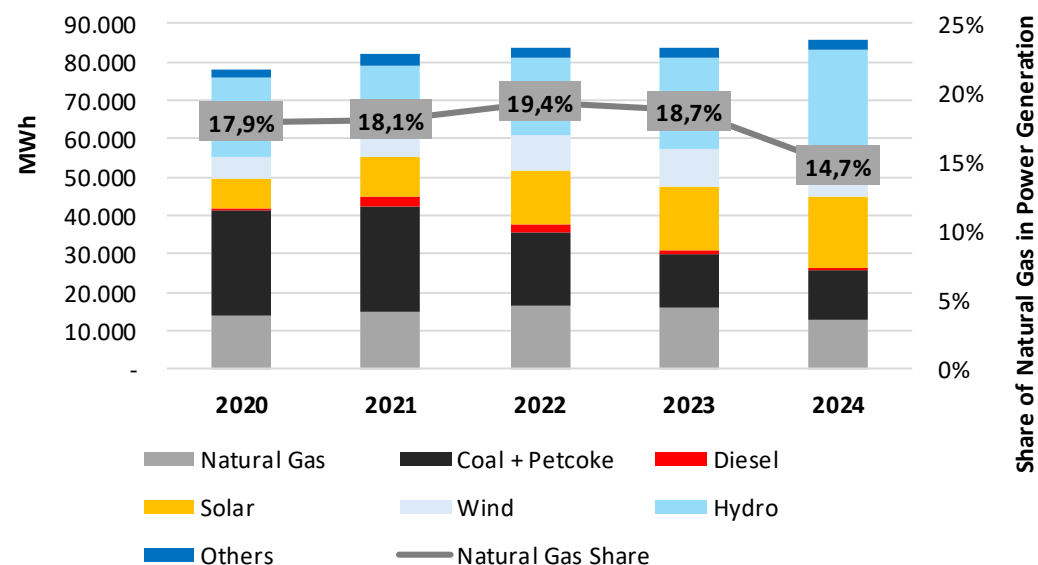
Pipeline	Capacity [Mcm/d]	Length [km]	Operational Status
Norandino	7,8	1060 (Chile 680)	Sporadic imports/exports operations from/to Argentina
Atacama	4,7	941 (Chile 411)	Inactive
GasAndes	10,8	536	Importing gas from Argentina
Gas Pacífico	6,0	676	Importing gas from Argentina
Cóndor-Posesión	2,0	9	Imports during the warm season
Cóndor-Posesión 2	2,5	9	Imports during the warm season

Natural Gas Security: Evolution of Use

Natural Gas Use by Sector

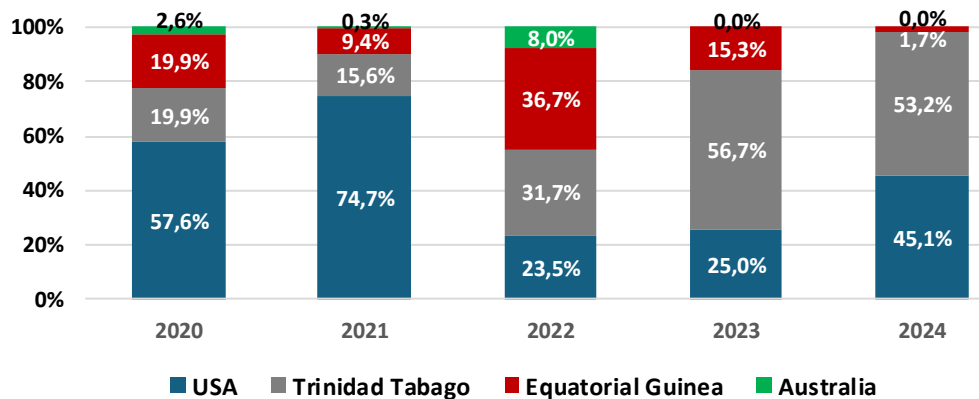


Natural Gas in Chile's Power Generation Mix: 2020-2024

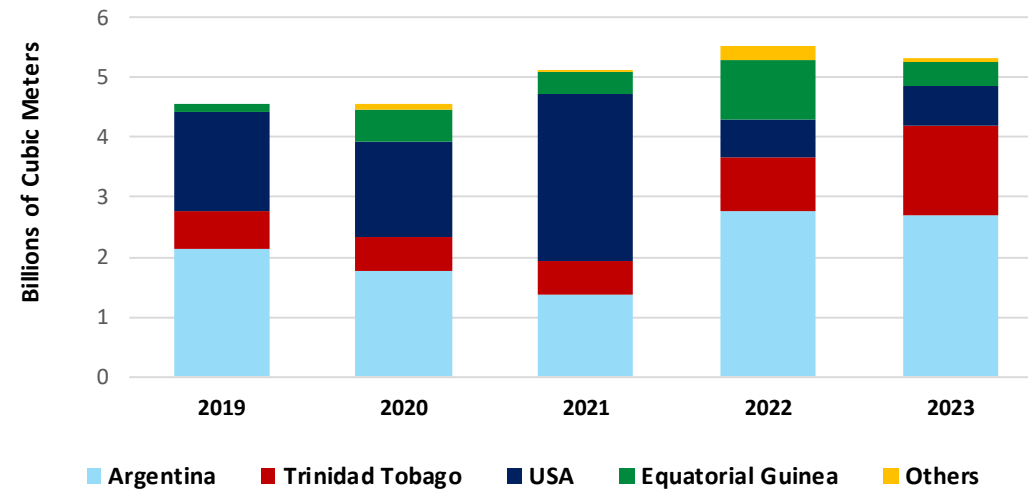


Natural Gas Security: Imports

LNG Imports by Country of Origin 2020-2024



Natural Gas Imports by Country (LNG+NG), 2019-2023



- No LNG stockholding mandate.
- Natural Gas exports must be informed to the Ministry of Energy and can be blocked or suspended in case of emergency.

Chile Fuel Security Measures



Some New Fuel Security Developments:

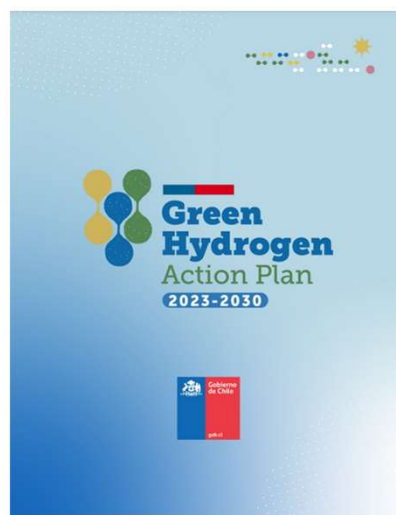
- Currently, in the process of updating the emergency communications protocols in the energy sector.
- 2023-2024: Trasandino Oil Pipeline restart.
- July 2024: “Climate Crisis Adaptation Strategy for the Energy Sector”: Energy Security as one of its principles (example: storm surges as a disruption to the fuels ports security).
- December 2024: “Climate Change Mitigation and Adaptation Plan for the Energy Sector”. Goal: Include risk management in the Fuels Sector: assess the vulnerability of fuels infrastructure
- March 2025: OLADE-CAF study on Chile-Argentina Natural Gas Integration.
- Expected for 2025: development of the “Energy Sector Plan for the Management of the Disasters Risk”, mandated by Law.

Fuels of the Future: Chile's Policy Framework



National Green Hydrogen Strategy

Published 2020



Green Hydrogen Action Plan

Published 2023



Chile SAF Roadmap

Published 2024



Chile Maritime Fuels Roadmap

Programmed for 1st semester 2025

Chile Fuel Security Measures

Thank You For Your Attention!

Questions?

