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Political paradox: Turkey shuns gas growth as it draws Russia close

Between the turn of the millennium and 2014 Turkey was one of the world's fastest-growing natural gas markets. Consumption went from 13.9 Bcm to 46.6 Bcm – a compound annual growth rate (CAGR) of 9.0%. This made gas not just the biggest component of the nation's primary energy mix, but also the dominant fuel in electricity generation.

Since then consumption has stagnated and gone into decline. Between 2014 and 2018 gas use rose only marginally, from 46.6 Bcm to 47.3 Bcm, a CAGR of less than 0.4%. Last year coal overtook gas as the dominant electricity fuel. Its share rose from 33% in 2017 to 39%, while the share of gas fell from 37% to 31%. A substantial proportion of coal consumption is highly polluting lignite, development of which is a policy priority because most hard coal is imported.

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