GIIGNL Annual Report
2016 Edition

Vincent Demoury – General Delegate, GIIGNL
GIIGNL Members as of 2016

76 Members located in 25 countries

2 new members in 2015:
• Dominion Cove Point
• GSPC LNG
Key Figures 2015

- Record year for global LNG imports
- Fastest growth in 4 years
- Stable share of spot and short-term trade

245.2 million tons imported or a 2.5% increase vs. 2014
68.4 million tons traded on a spot or short-term basis or 28% of total trade
72% of global LNG demand in Asia

THE LNG INDUSTRY
GIIGNL ANNUAL REPORT 2016 EDITION

3 NEW IMPORTING COUNTRIES
7 NEW LNG REGASIFICATION TERMINALS

34 IMPORTING COUNTRIES
777 MTPA TOTAL REGASIFICATION CAPACITY

19 EXPORTING COUNTRIES
308 MTPA TOTAL NAMEPLATE LIQUEFACTION CAPACITY
LNG Imports in 2015 (in MT)

- Japan and South Korea losing market share
- Europe back on the stage
- Latin American demand difficult to predict
LNG Supply in 2015 (in MT)

- Pacific Basin responsible for new supply
- Qatar maintains market share
- Australia 2nd largest exporter
LNG Flows: towards de-globalization?

- Intra-Pacific flows prevail
- Middle-East to Pacific flows decline
- Qatar remains most diversified supplier
Spot and Short-Term vs Total LNG Trade

• Stable share of spot & short-term (28-29%)

• Decrease in M.E supply volumes offset by Pacific

• Middle-East rising as importer of spot and short-term LNG

• Asian imports down from 74% to 68% of total spot and short-term imports

*Note: Short-term trade denotes trades under contracts of a duration of 4 years or less.*
Re-exports: an epiphenomenon?
Regasification Outlook
Regasification capacity under construction

- China (40%)
- Philippines (21%)
- Pakistan (14%)
- Lithuania (7%)
- France (5%)
- Poland (4%)
- Korea (4%)
- Egypt (3%)
- Jordan (2%)
- India
- Colombia
- Panama
- Uruguay
- Singapore
- Thailand
- Netherlands
- Israel
- Dubai

Technical & Commercial Study Groups

**COMMERCIAL STUDIES**

- Annual Report
- LNG Voyage Charter Party « LNGVOY »
- Commercial aspects related to the Retail LNG handbook
- Key criteria for the emergence of an LNG trading hub

**TECHNICAL STUDIES**

- Incident Identification
- Retail LNG Handbook
- Roll-Over Report update
- Import facilities / Power plant integration
- Recommendations to operate receiving terminal in low send-out periods
- CTHB : 4th edition

Dedicated Poster Session
Thursday 14 (15:00 to 17:30) in BelleVue Ballroom 1