

17th INTERNATIONAL CONFERENCE & EXHIBITION ON LIQUEFIED NATURAL GAS (LNG 17)



New markets for the LNG Industry



by: Domenico Dispenza, GIIGNL President
April 17, 2013



International Organizers



Host Association



GIIGNL: Worldwide Association of LNG Importers



GIIGNL's main objective is to study and promote the development of activities related to LNG : purchasing, importing, processing, transportation, handling, regasification and various uses of LNG.

GIIGNL members by zone and country (end of 2012)

Zone	Countries	total
AMERICAS	Argentina (1), Canada (1), Chile (1), U.S.A. (7),	10
ASIA	China (2), India (3), Japan (21), Korea (3), Taiwan (1)	30
EUROPE	Austria (1), Belgium (2), France (4), Germany (1), Greece (1), Italy (3), Norway (1), Portugal (2), Spain (3), The Netherlands (4), Turkey (1), United Kingdom (7)	30
		70

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GIIGNL Annual Report The LNG Industry



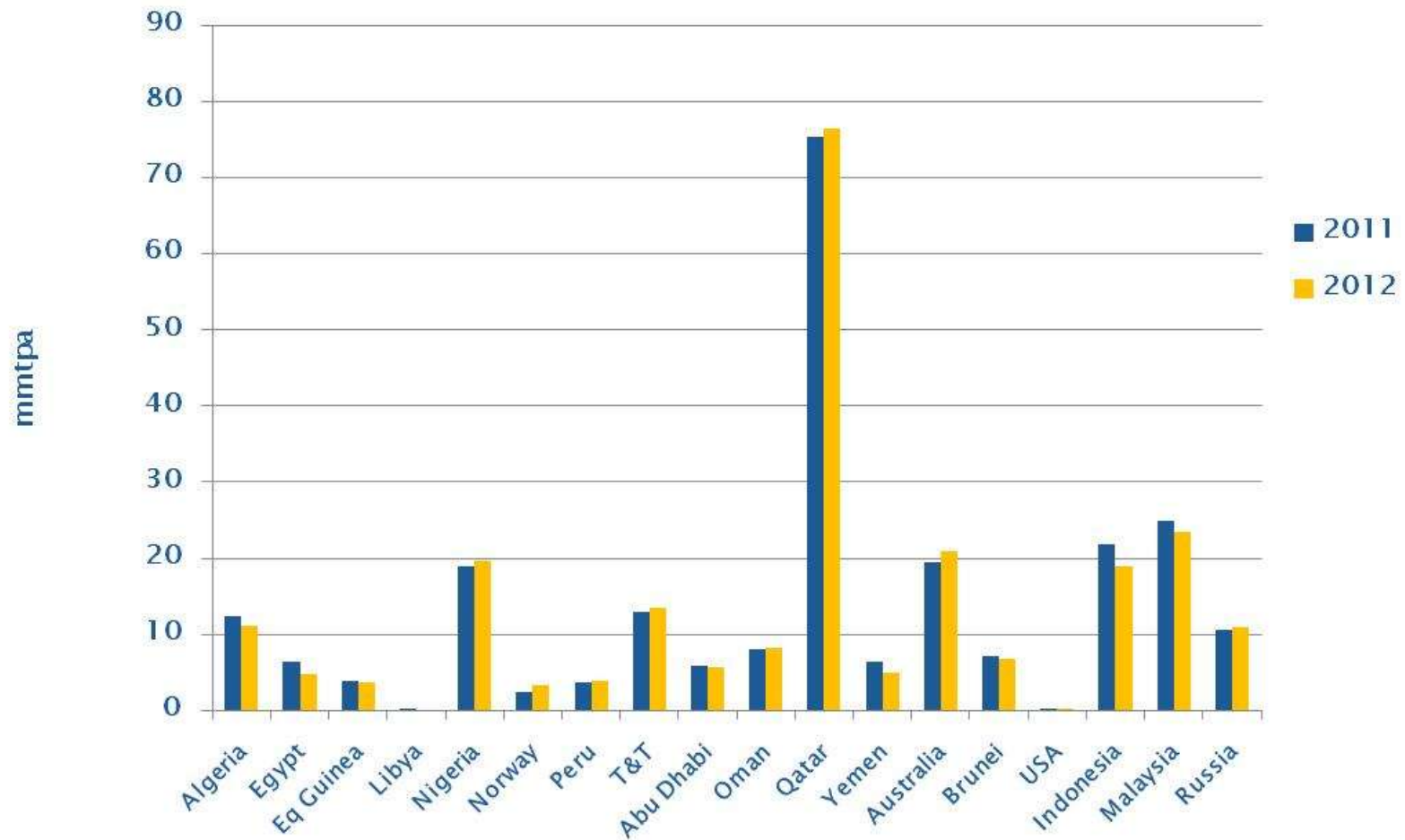
2012



The LNG Industry



LNG Exports

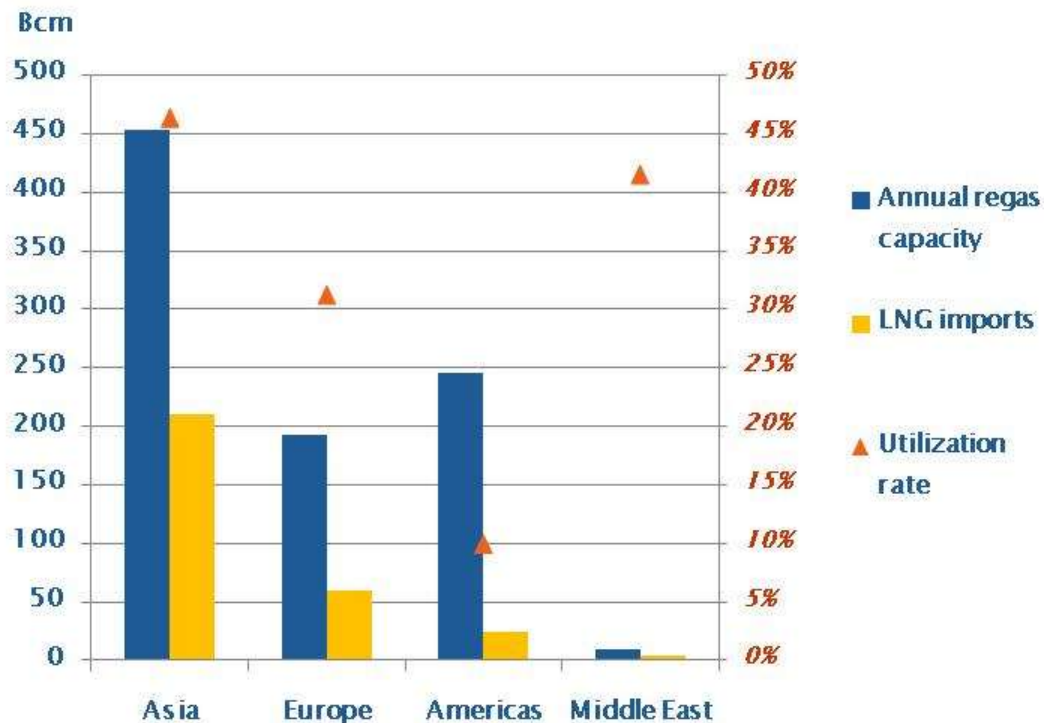


Source: GIIGNL

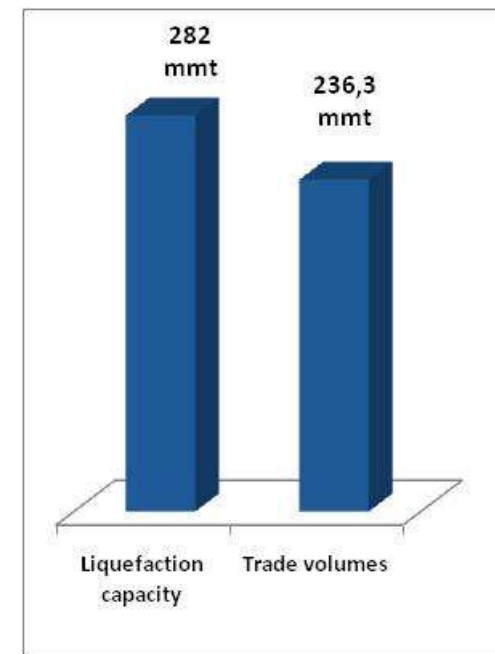
Utilisation of liquefaction and regasification capacities



Regasification capacity vs LNG imports in 2012



Worldwide liquefaction capacity vs LNG consumption in 2012



Equivalent to 84 % use of the liquefaction capacity

Spot, short-term & re-exports

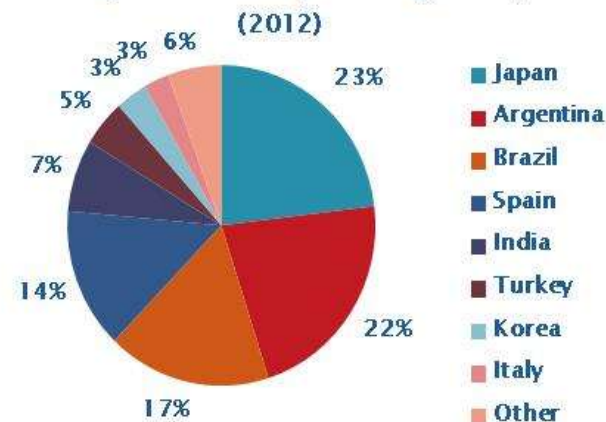


Spot and Short-Term LNG Trade & Share of Total LNG Trade since 2000

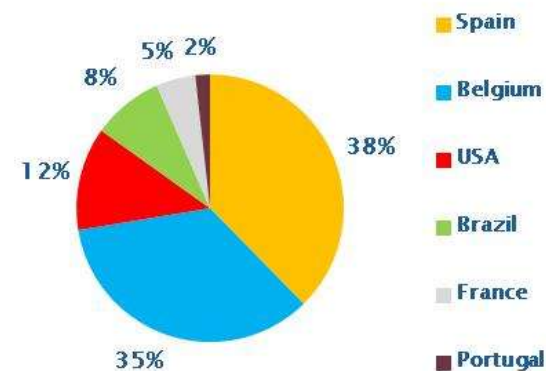


*Note: Short-term trade denotes trades under contracts of a duration of 4 years or less.

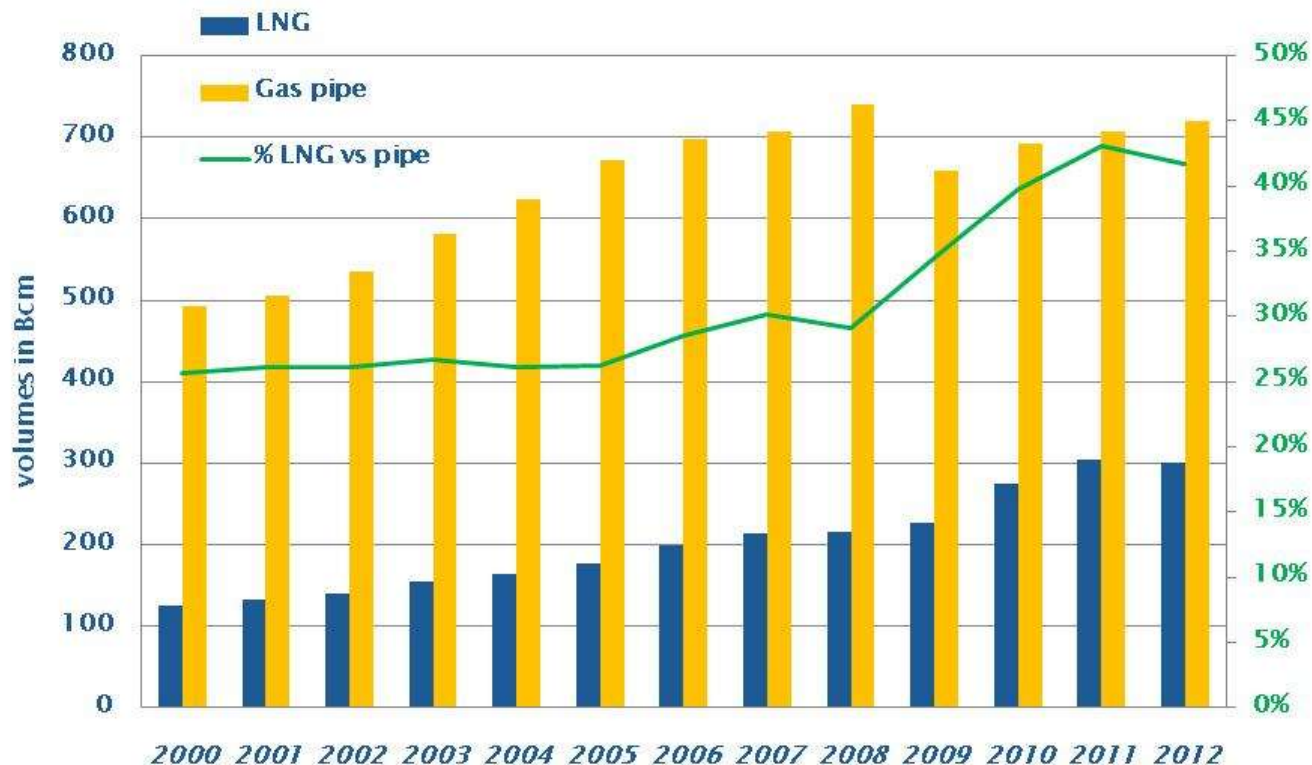
Re-exports received by receiving country



Re-exports loaded by re-loading country



Worldwide international gas trade – LNG vs gas pipe



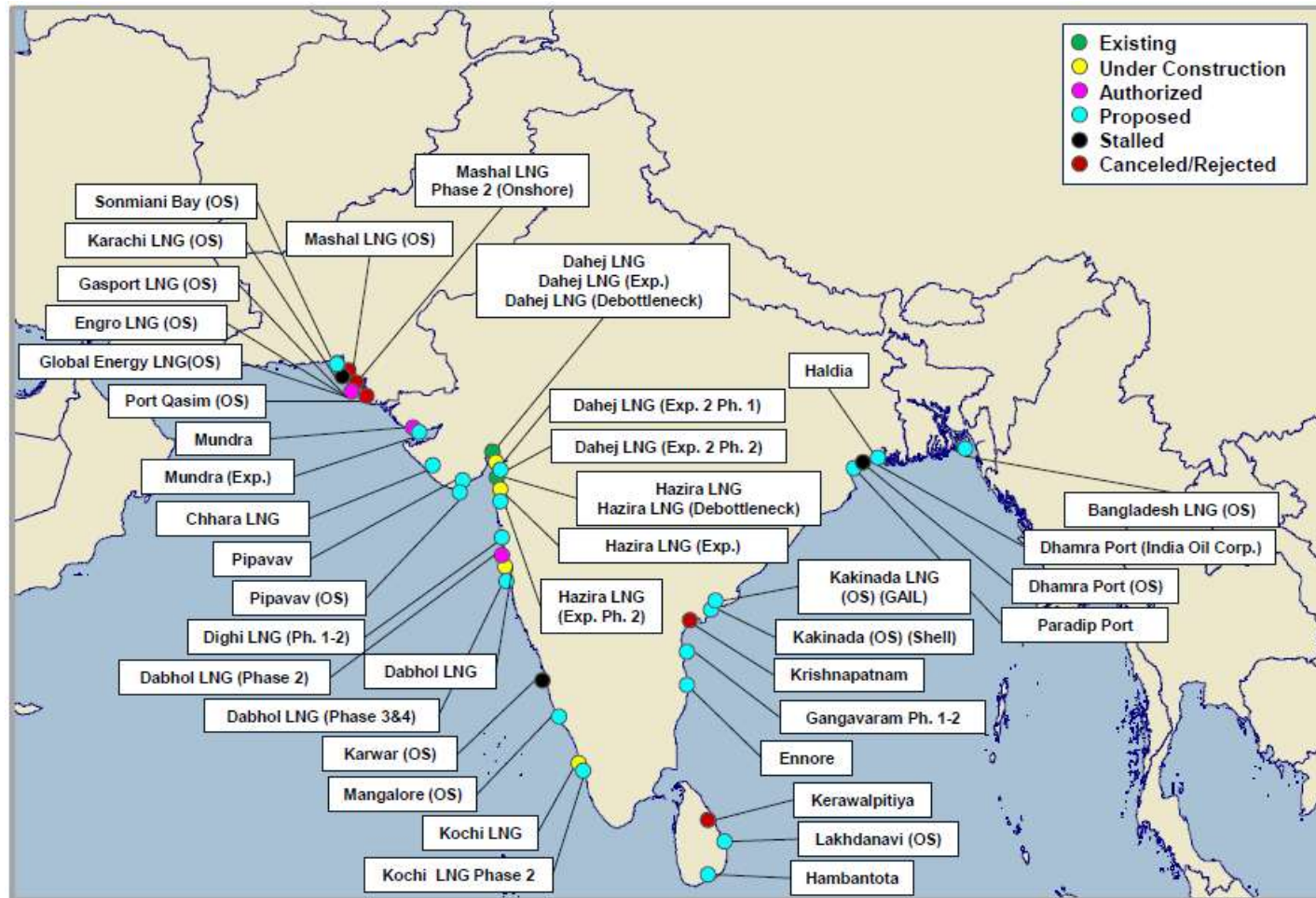


LNG terminals in China (existing & planned)



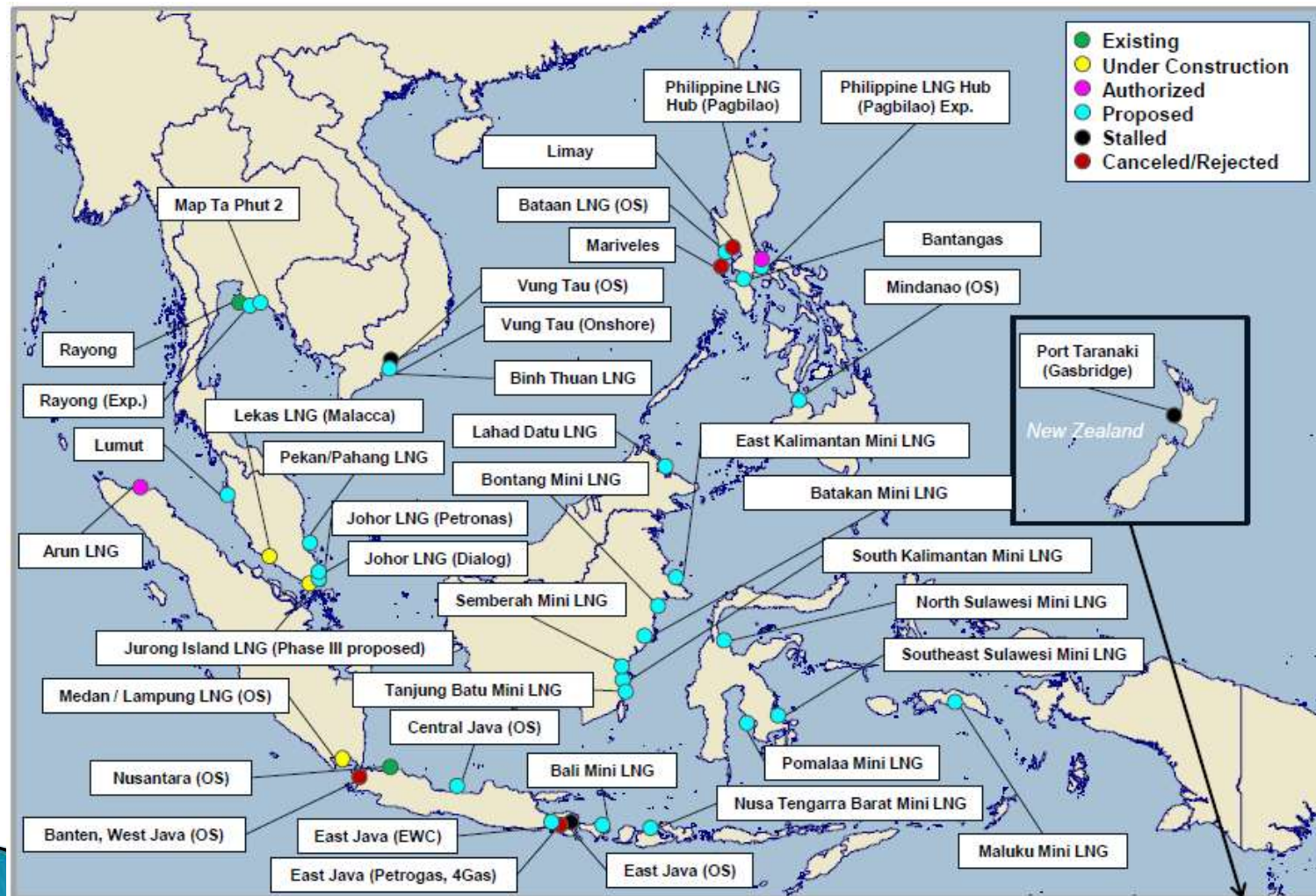
This map is without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

LNG terminals in India (existing & planned)

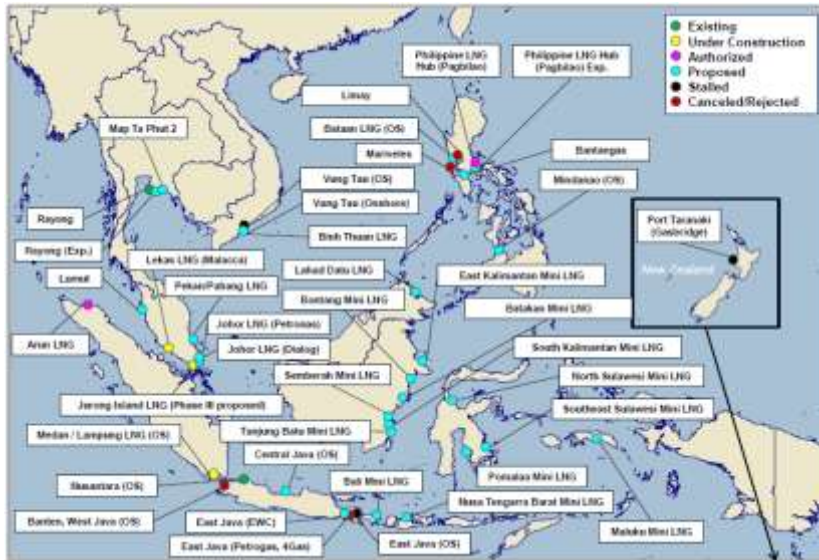




Regasification terminals in LNG exporting countries incl. Indonesia, Malaysia, Egypt

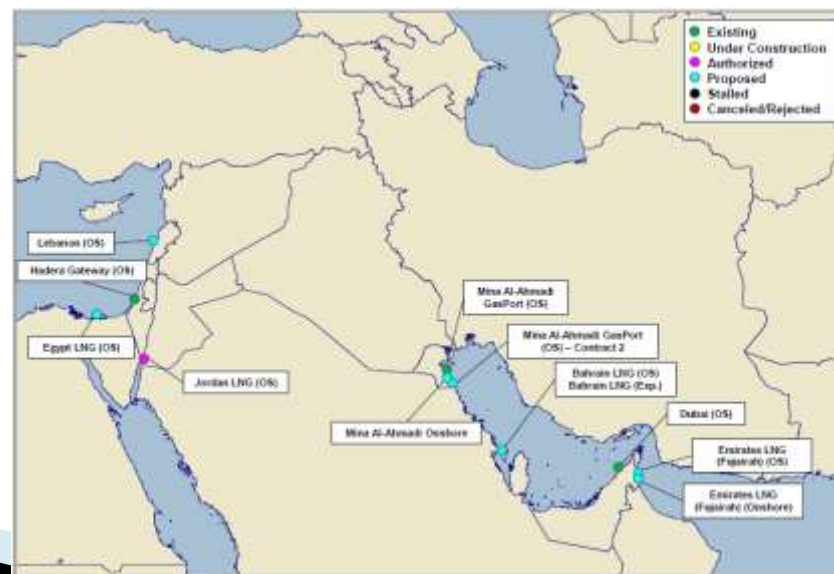


New LNG importers in emerging markets



South America

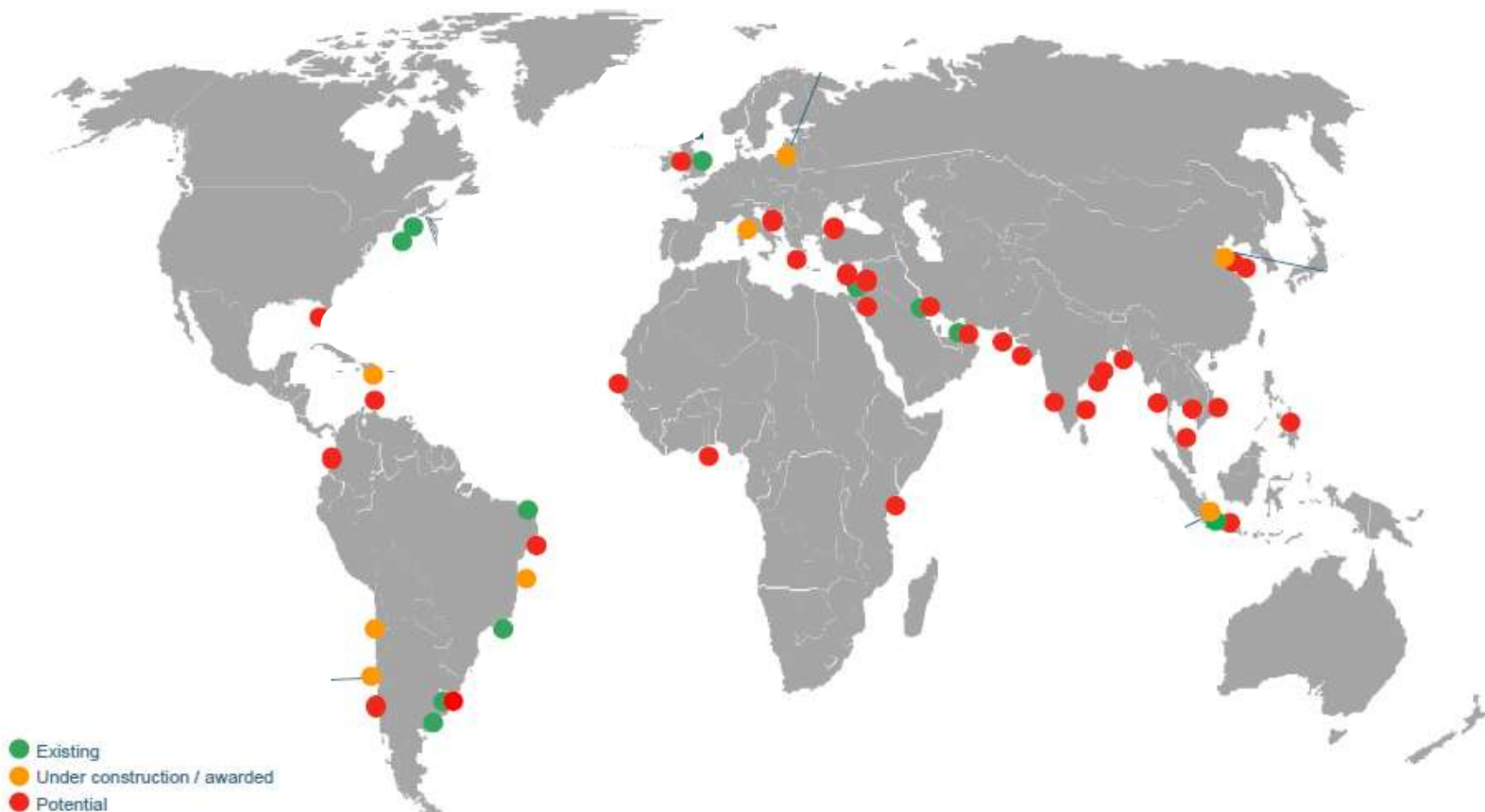
South East Asia



Middle East & North Africa

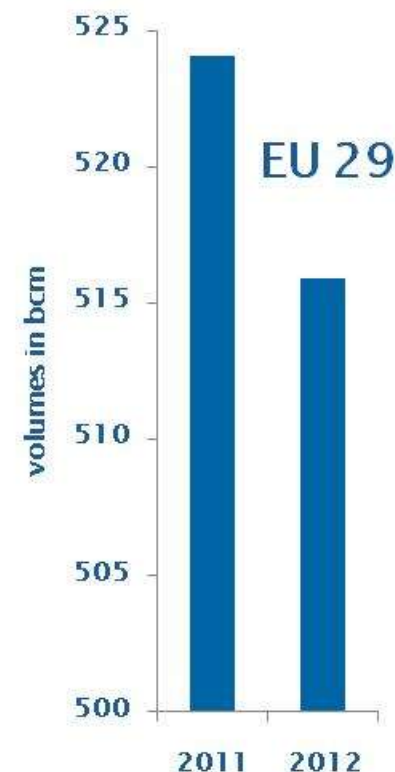
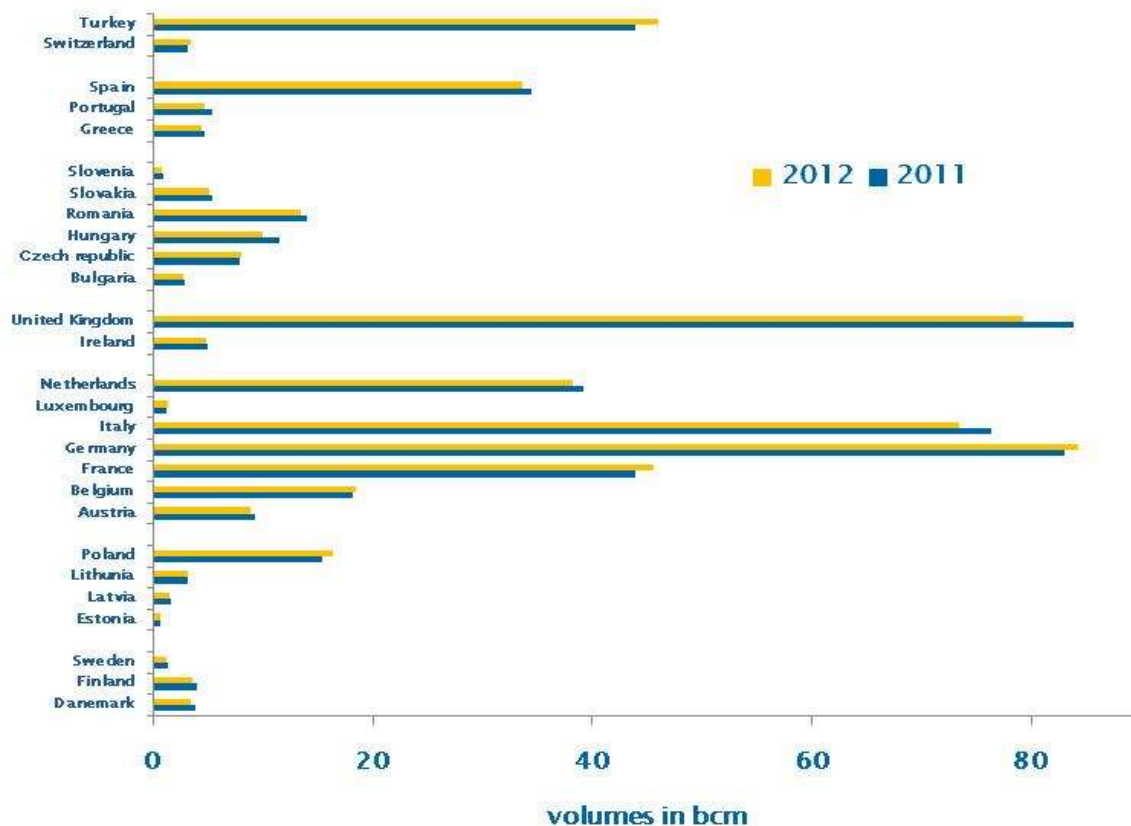
Source PFC

FSRU projects



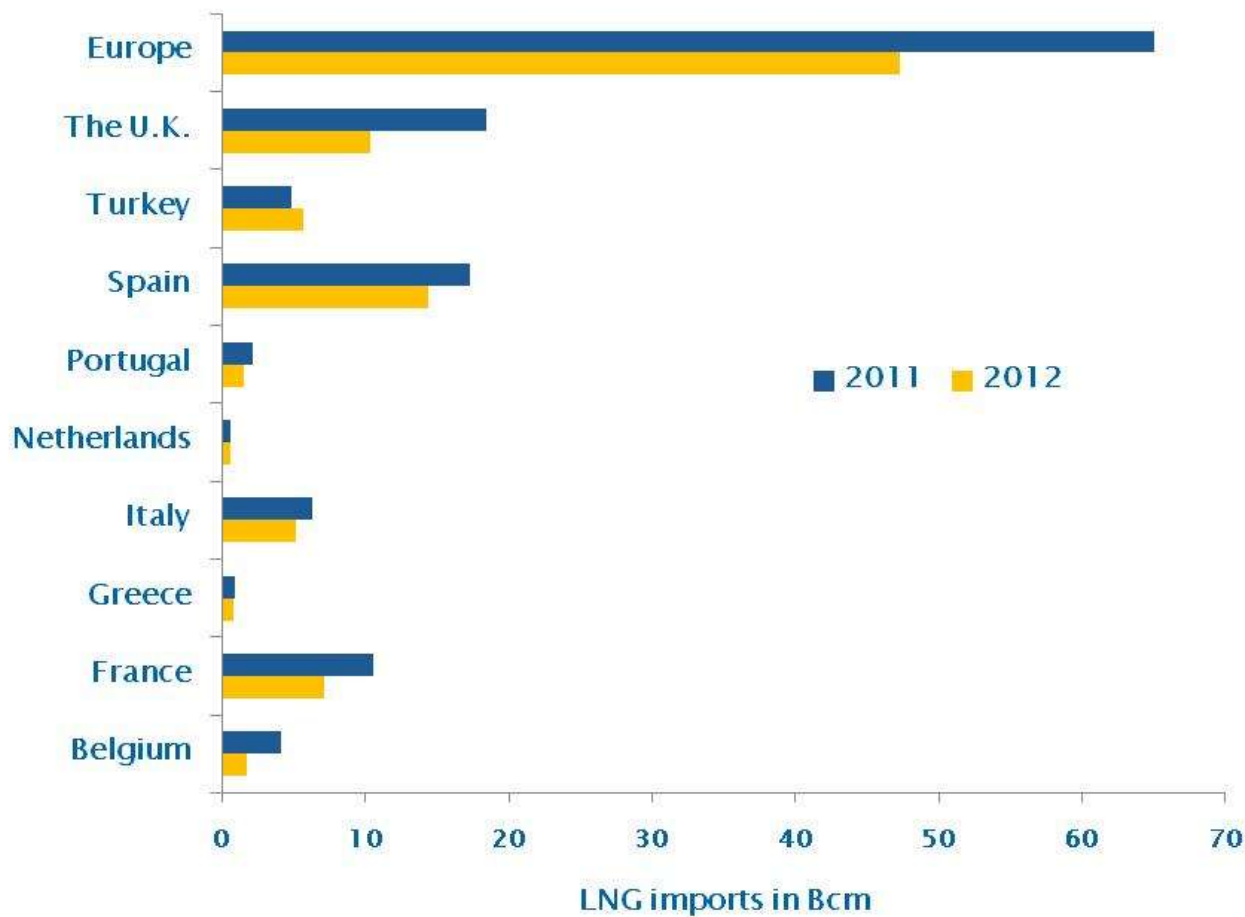
Europe 29 gas consumption

(including Switzerland & Turkey)



Source: Eurogas

LNG imports in Europe



Source: GIIGNL

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Thank you all



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