

PARIS – DOHA – 07/09/2020

LNG DEMAND IN A POST-COVID AND DECARBONIZING WORLD

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GIIGNL

88 Members in 26 countries – LNG importers and LNG terminal owners and operators

*Promoting cooperation
between LNG importers*



SUMMARY

01

LNG IN 2019-2020 AND BEYOND

02

FUTURE LNG DEMAND IN THE
BALANCE

03

LEVERAGING TECHNOLOGY AND INNOVATION

04

CONCLUSIONS



THE LNG INDUSTRY IN 2019



354.7 MT

Imported

+13 %



34 %

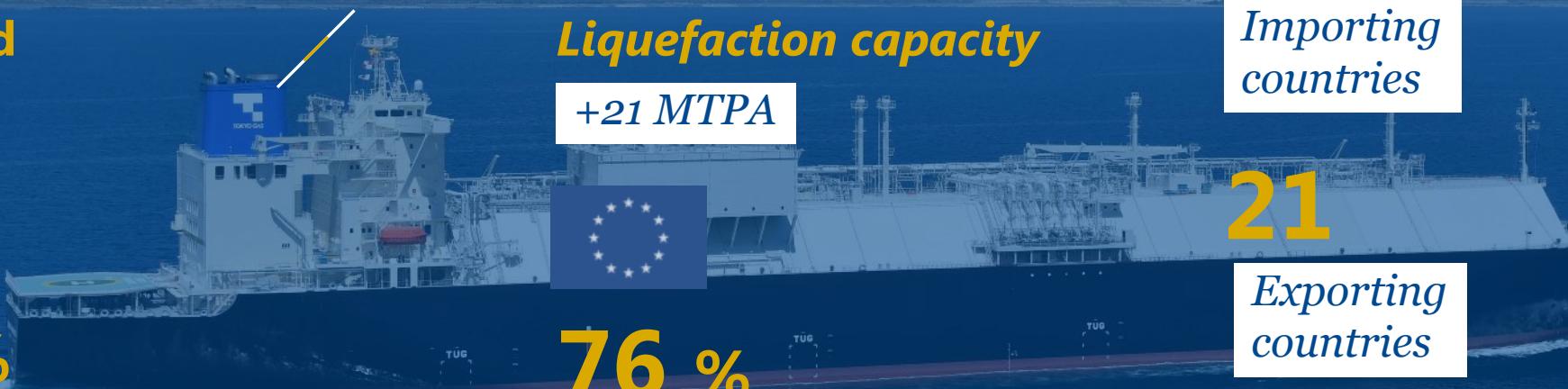
*Delivered
on Spot* or Short-term***



427 MTPA

Liquefaction capacity

+21 MTPA

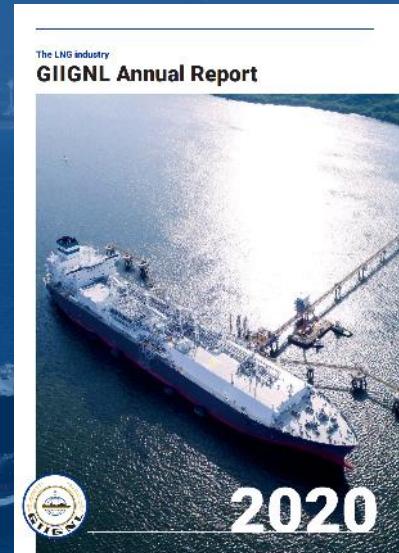


42

Importing countries

21

Exporting countries



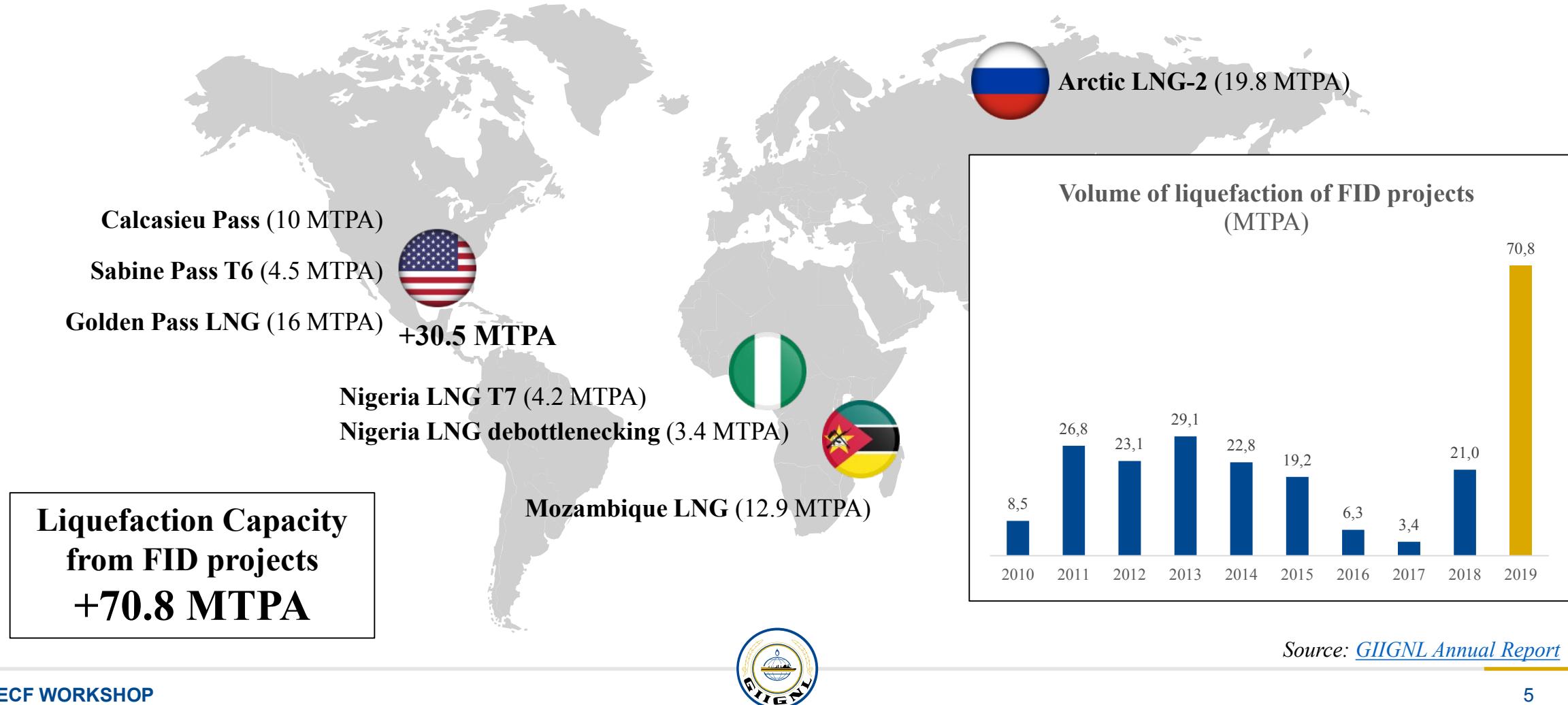
*Spot: Trades under which LNG cargoes are delivered within 90 days from the transaction date

**Short-term: Trades under which LNG cargoes are delivered between 90 days and 4 years from the transaction date

Source: [GIIGNL Annual Report](#)

WILL WE SEE A YEAR LIKE 2019 AGAIN?

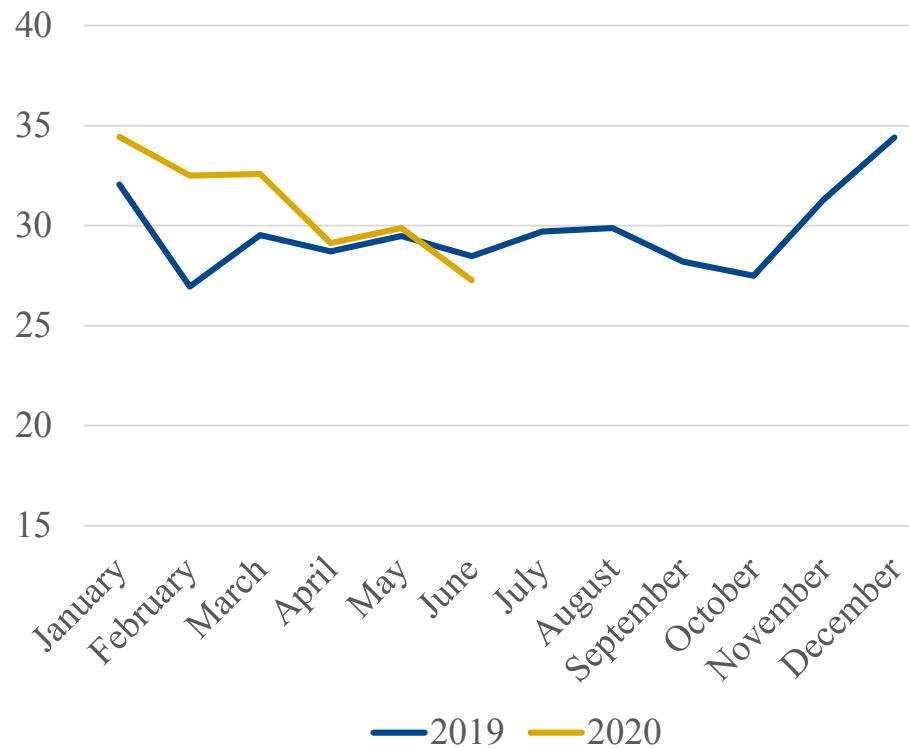
6 FIDs have been taken in 2019, the highest volume of liquefaction of all time



LNG DEMAND: A BUMP IN THE ROAD?

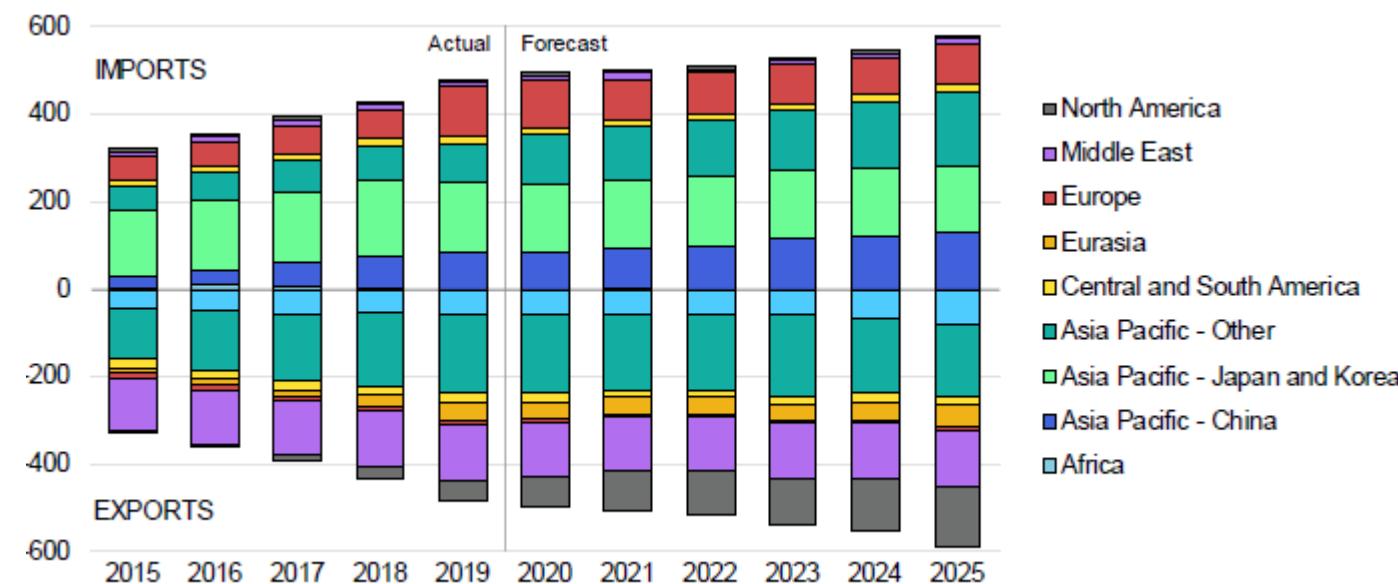
Subtitle of the slide

Monthly global LNG Imports 2019 vs 2020 (MT)



Source: GIIGNL, Kpler

World LNG Imports and Exports by region 2015-2025 (BCM)



Source: IEA



FUTURE LNG DEMAND IN THE BALANCE

Subtitle of the slide

Uncertainties

- Economic growth
- Volatility
- Affordability
- Environmental Policies



Source: GIIGNL Covid-19 Impact Survey

LEVERAGING TECHNOLOGY AND INNOVATION TO IMPROVE COMPETITIVENESS AND SUSTAINABILITY

Subtitle of the slide

- Methane emissions monitoring, reporting, verification and mitigation
- CCUS
- Electric Liquefaction
- Boil-off and methane slip reduction
- LNG carbon-offsetting



CONCLUSIONS

Subtitle of the slide

- LNG demand poised to grow, mostly driven by emerging Asian markets
- Existing and new projects could face acceptability, affordability and profitability issues
- Energy prices, public and private capital availability and strong policies will be essential
- Suppliers, buyers and policy makers should partner to realize LNG's full potential and achieve a sustainable energy future



THANK YOU

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