

LONDON – 28/NOV/2019

LNG TERMINALS TRENDS AND DEVELOPMENTS

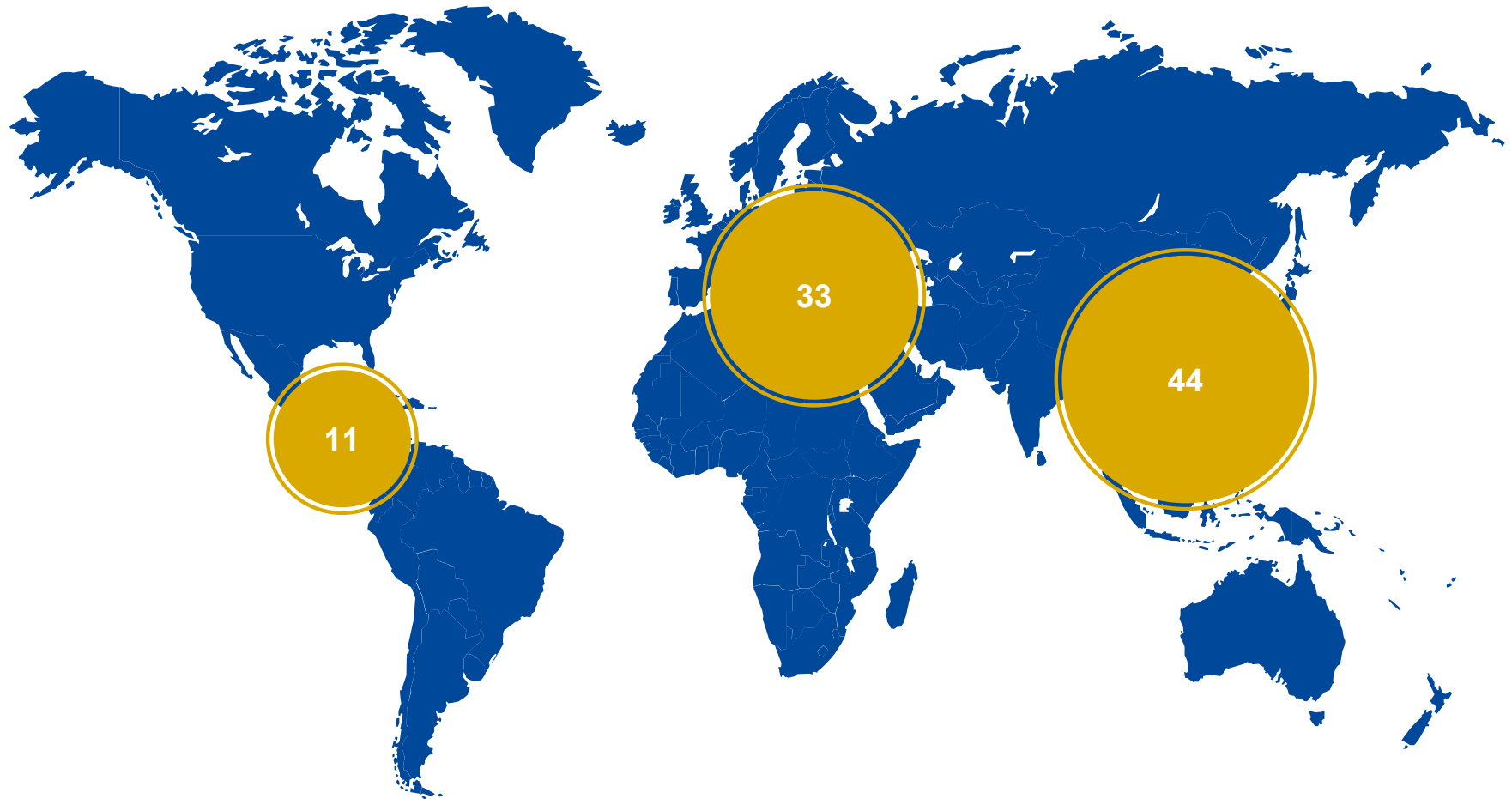
Vincent Demoury, General Delegate



GIIGNL

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

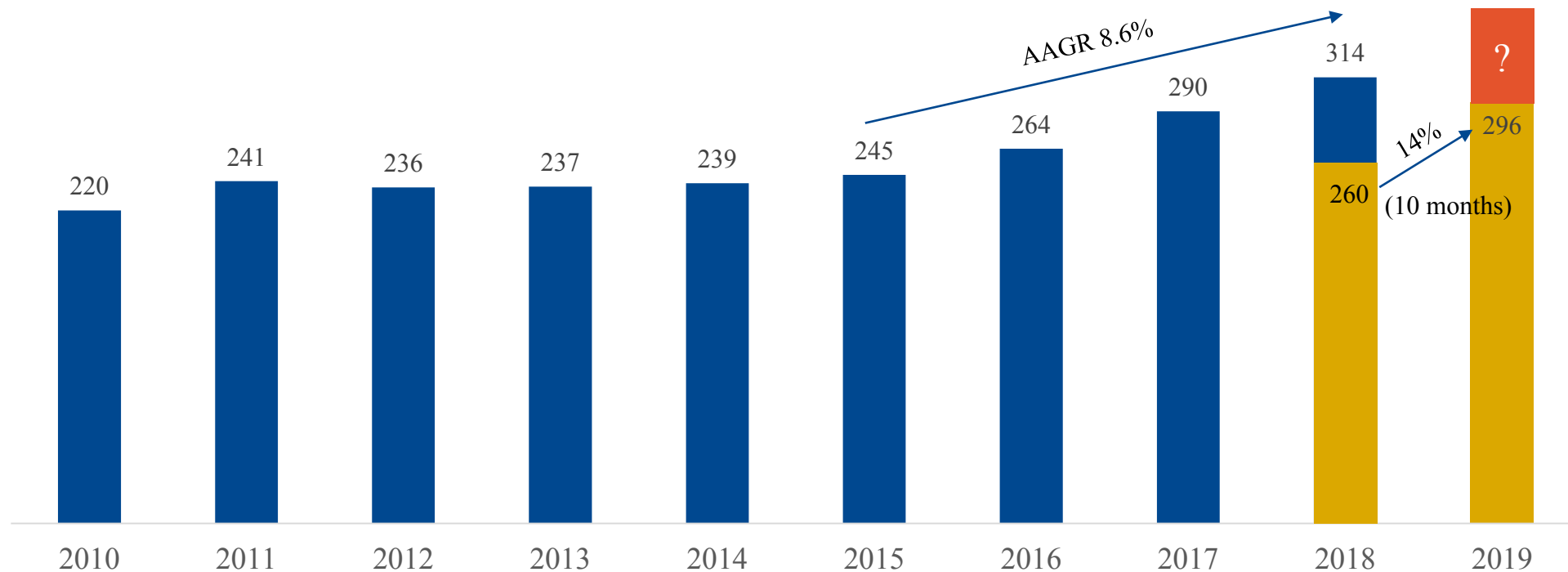
*Promoting
cooperation
between leading
players in the
LNG industry*



LNG IMPORT GROWTH ACCELERATING

LNG trade has grown consistently and more LNG flows into the world

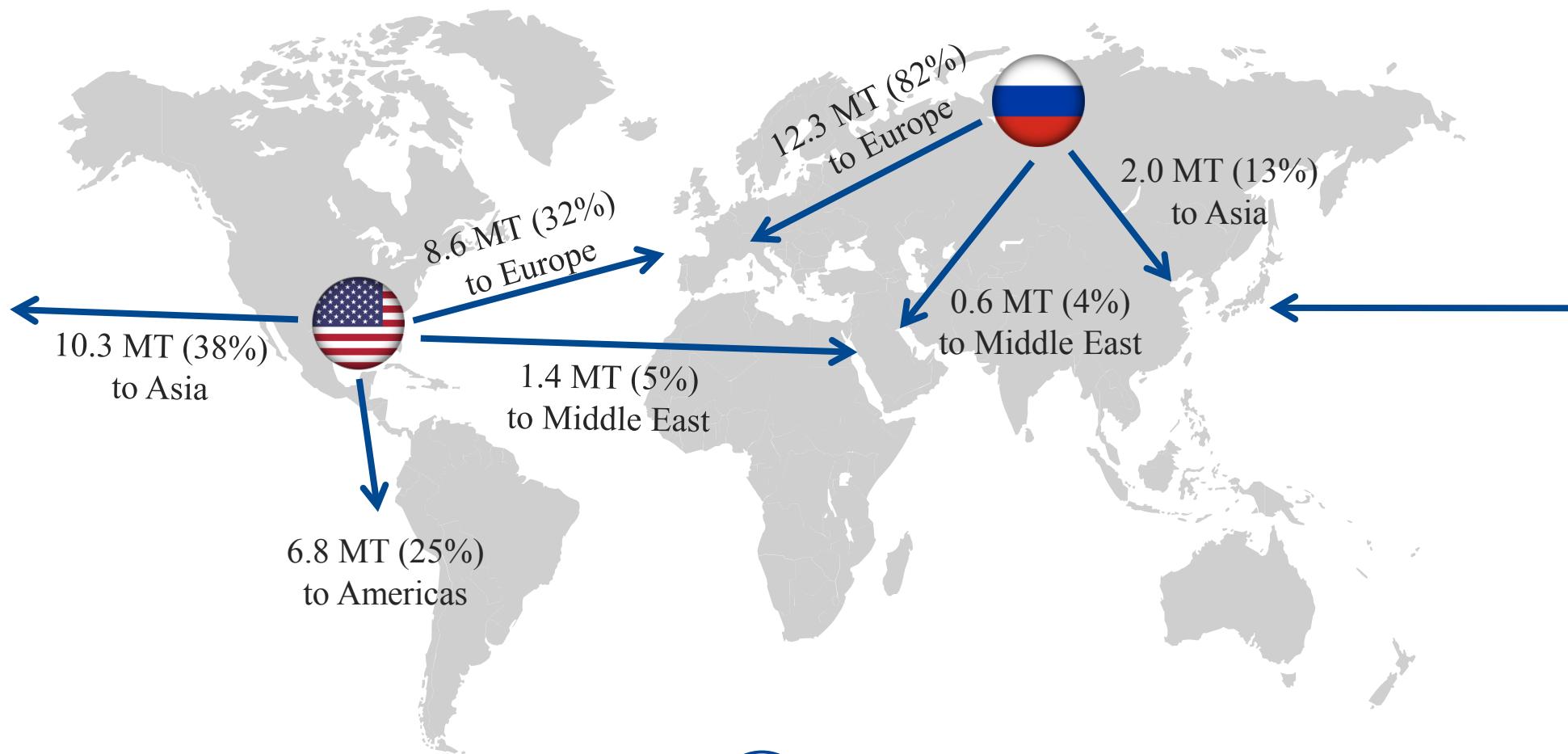
LNG imports 2010-2019 (MT)



Source: [GIIGNL](#), Kpler

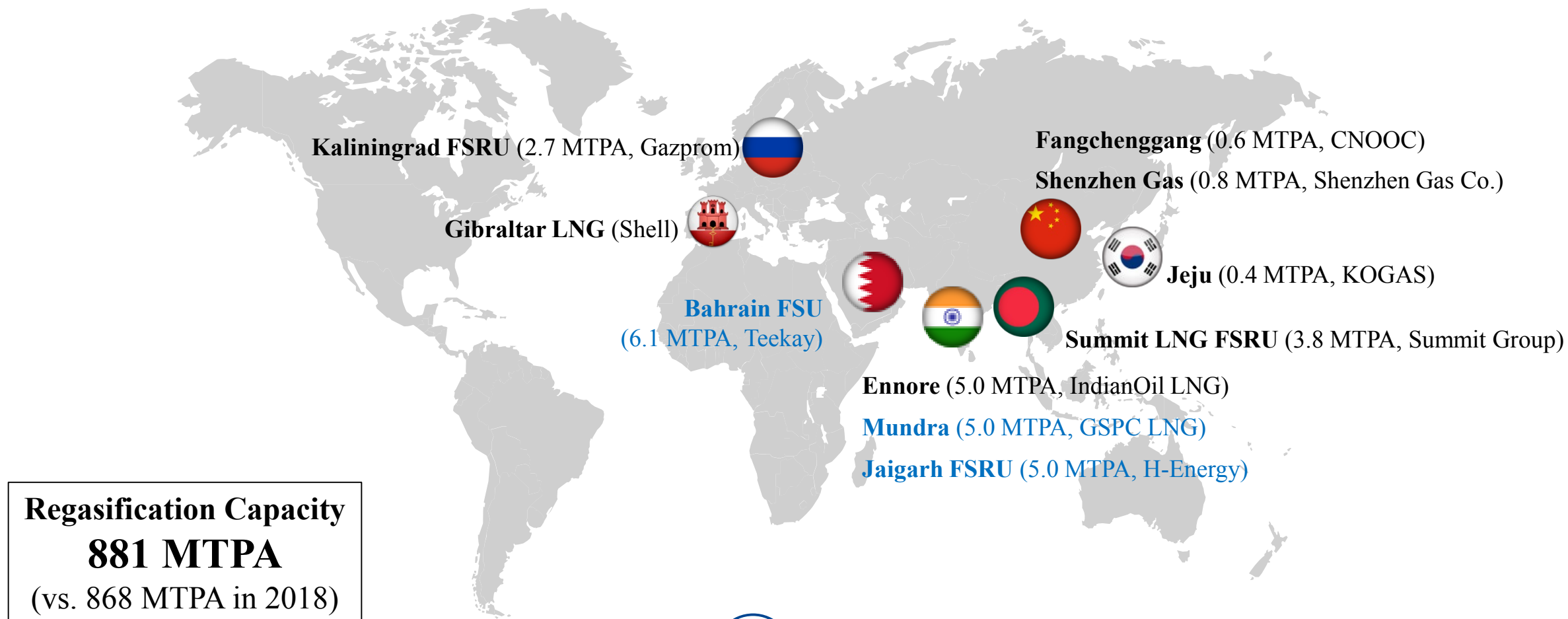
US AND YAMAL ADD LIQUIDITY

US exported 27 MT of LNG to 30 countries, Yamal did 15 MT to 19 countries (first 10 months)



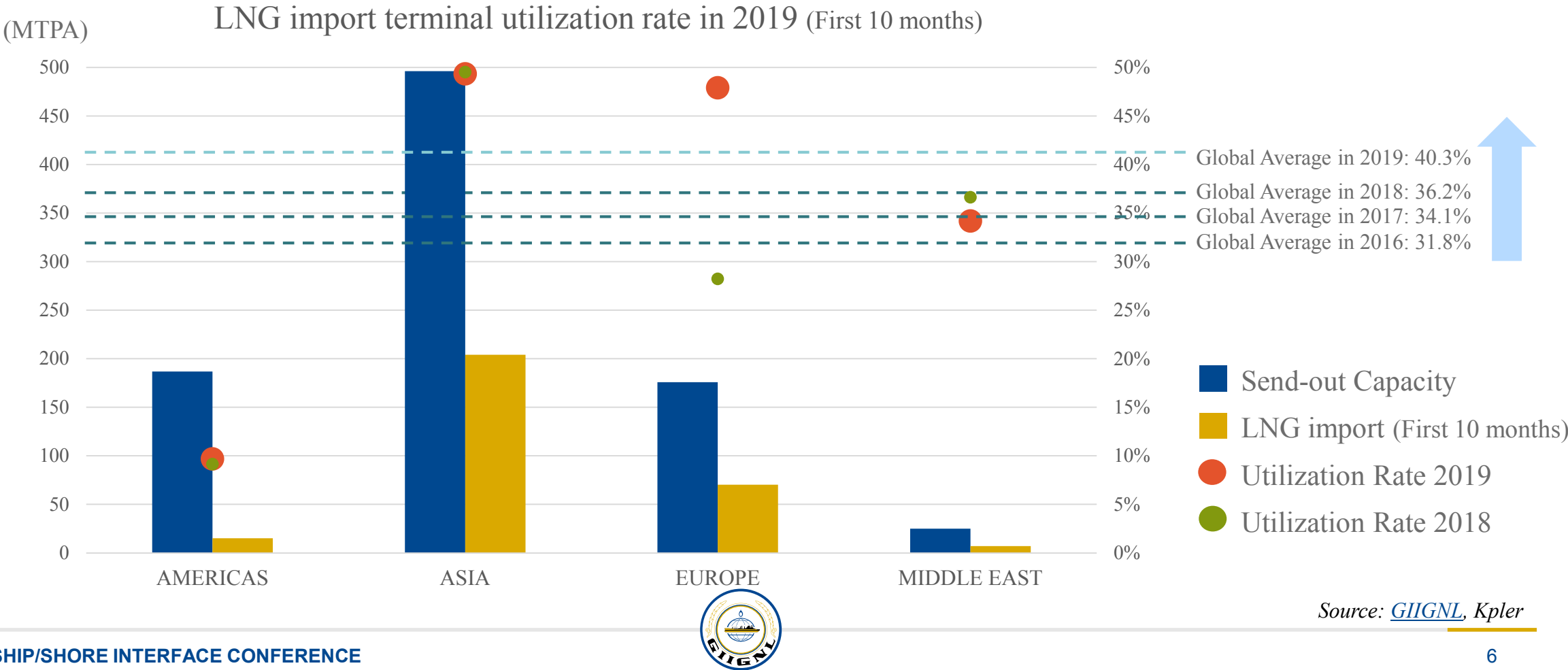
REGASIFICATION TERMINALS IN 2019

7 new terminals were commissioned, adding a combined 13 MTPA of new regasification capacity



EUROPEAN TERMINALS ARE BUSIER IN 2019

Asian countries such as China, India, Taiwan and Pakistan need more capacity



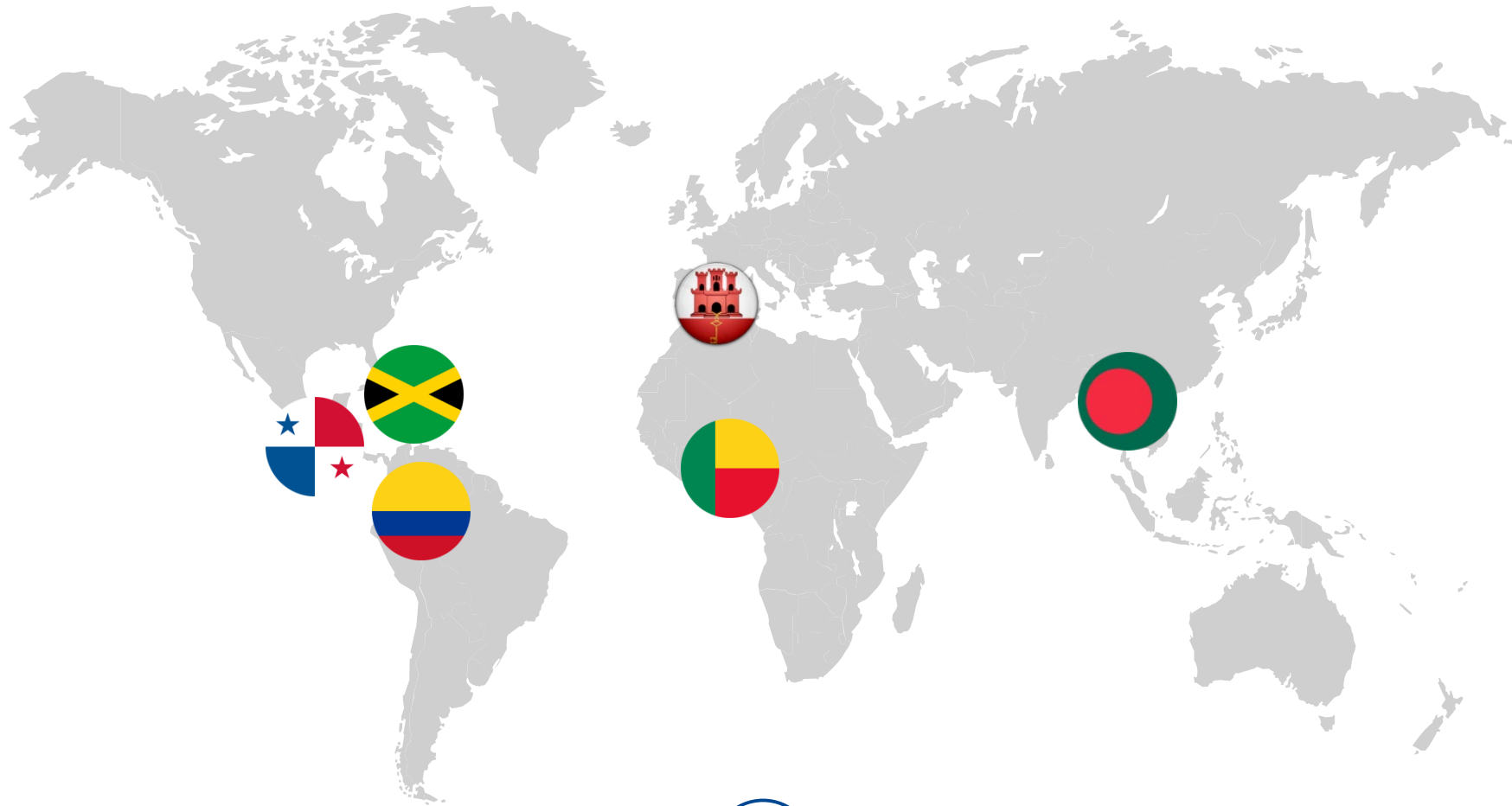
DIVERSIFYING NATURAL GAS SOURCES

But European dependence on Russian gas is remaining due to the increasing LNG imports from Yamal LNG



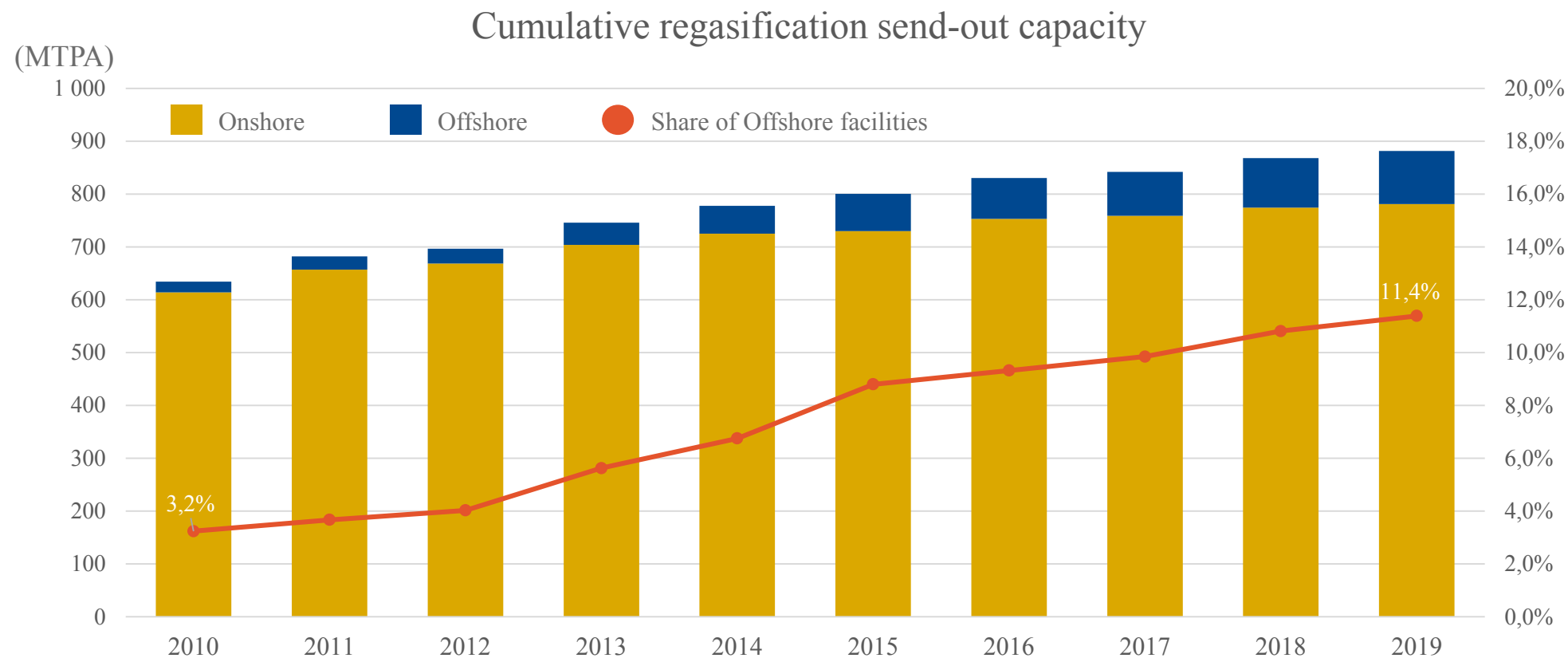
LNG TO PLAY KEY ROLE IN POWER

Financing and infrastructure development challenges remain



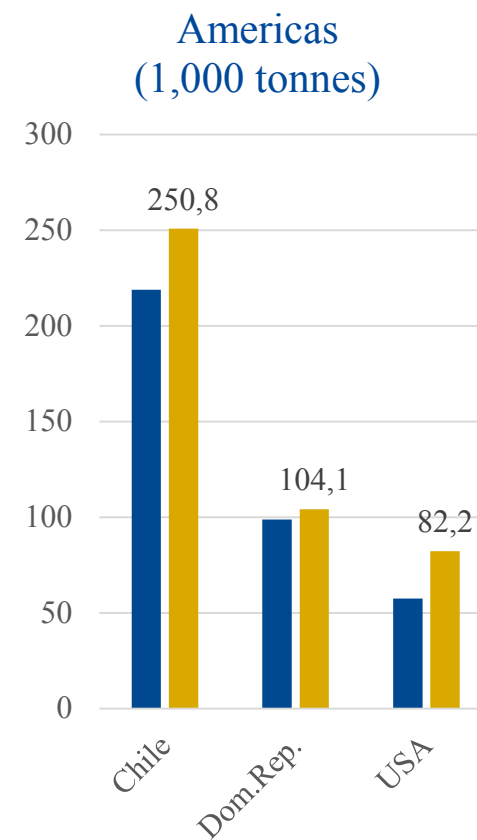
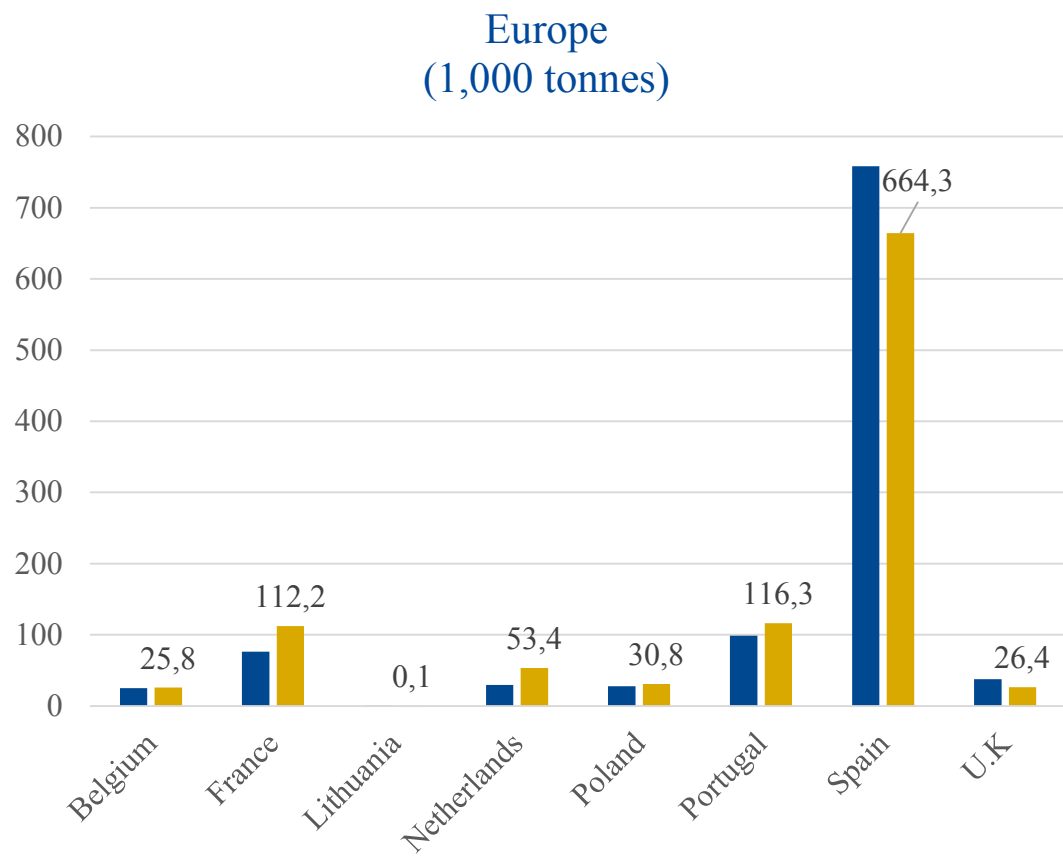
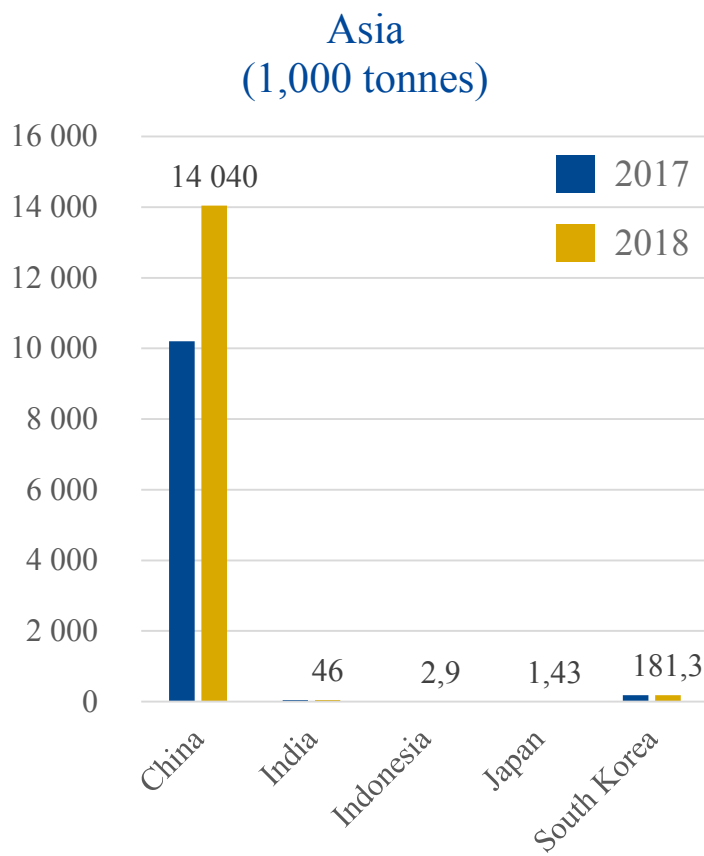
FSRU: FAST AND FLEXIBLE OPTION

Offshore facilities account for 46% of total send-out capacities newly added from 2015 to 2018



EXPANDING ACCESS TO LNG VIA TRUCKS

LNG terminals will be a regional focal point for the clean energy but volumes remain marginal



NEW AREAS FOR LNG TERMINALS

Many terminals provide various LNG-related services and expanding their areas to new business

- In last 3 to 5 years, many European terminals have added various services such as LNG storage, Reloading, Transshipment, Truck loading, Cooling down in addition to their traditional services.
- Truck-to-Ship LNG bunkering operations take place in the ports of Belgium, France, Germany, Japan, Netherlands, South Korea, Spain, UK.



Truck-to-Ship LNG bunkering for *ECONURI* by KOGAS at Incheon port



Truck-to-Ship LNG bunkering for *Sakigake* by Tokyo Gas at Yokohama port



Guidelines for Reloading, GIIGNL

Source: KOGAS, Tokyo Gas

LATEST DEVELOPMENTS IN EUROPE

Operators continue upgrading their terminal for services such as truck loading, bunkering and transshipment

Fluxys

- Additional compressor and a 5th storage tank for transshipment
- Two truck loading stations in parallel in Zeebrugge
- Constructing an LNG bunkering pontoon for the Antwerp port

Dunkerque LNG

- Truck loading bay completed (3,000 trucks per year)
- Works to adapt the jetty for small vessels from 5,000 m³

Polskie LNG

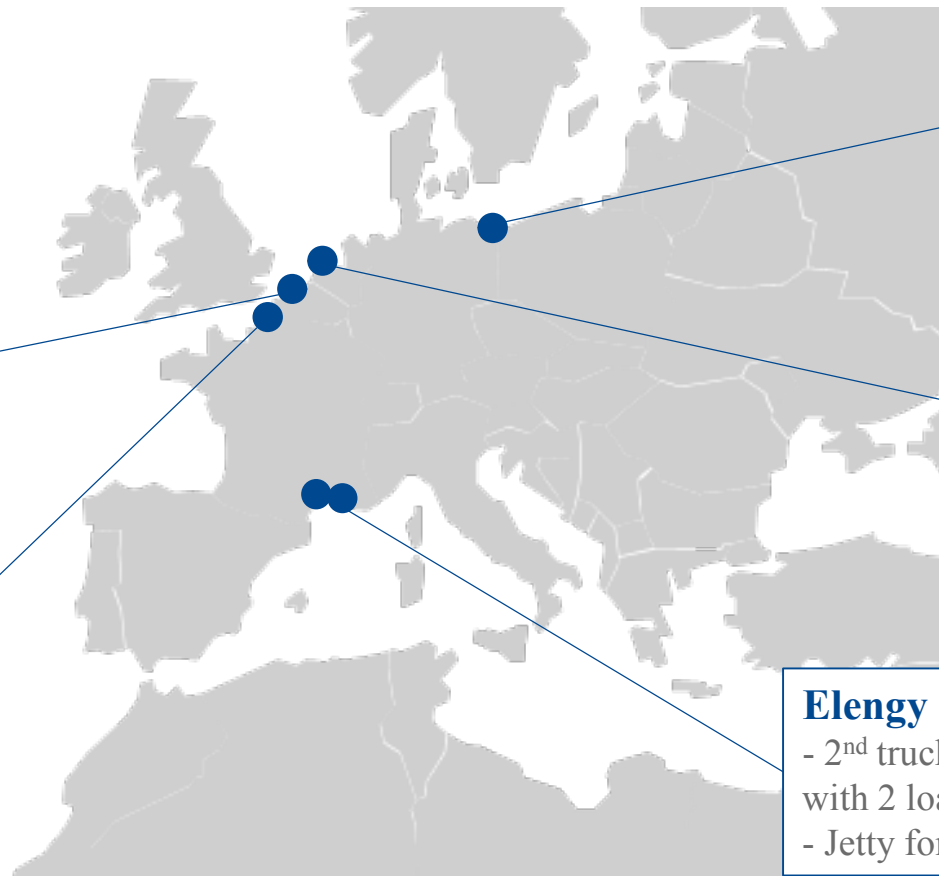
- Expansion program inc. LNG-to-rail transshipment installation and additional jetty for SS-LNG

Gate

- Truck-loading facility incorporating 3 loading bays
- Third Jetty for small vessels with a capacity from 1,000 m³
- ship loading flow rate increased from 2300 m³/hour to 4000 m³/hour

Elengy

- 2nd truck loading bay in Fos Tonkin & new station with 2 loading bays at Fos Cavaou
- Jetty for small vessels from 5,000 m³ at Fos Cavaou



CONCLUSIONS

- Additional LNG import infrastructure still needed in many parts of the world
- LNG terminals will be a focal point for future energy systems by re-distributing LNG via small-scale vessels or LNG tanker trucks
- Terminal operators are expanding their businesses beyond their traditional role to LNG related services
- Decarbonizing strategies will be key for the sustainability of operations



THANK YOU

