Global LNG Markets (2012) - Trends, Outlook and Business Prospects to 2020

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Abstracts

The global LNG industry continues to face high level of uncertainty in supply and demand forecasts. Rapid changes in the industry in the recent past including Japanese nuclear outage, recession in Europe, delays in Australian and African supply, the US liquefaction plans, raising concerns of shale gas, Europe nuclear phase out plans coupled with emergence of new markets are forcing companies and investors to reformulate their investment and LNG strategies.

Actual LNG imports exceeded forecasts in 2011 driven by increased imports from traditional importers and developing economies. Coupled with this, relatively higher LNG prices over 2010 led to a rise in revenues for most LNG exporters. However, despite increase in revenues, sustainability of high revenues in near to medium future is yet un-certain.

High prospects of LNG have encouraged most reserve rich countries, companies and investors to invest in liquefaction infrastructure. Globally, 12 countries including Australia, Papua New Guinea, the US, Russia and Venezuela are planning new terminals. If all the planned liquefaction terminals are realized, the industry will have large supply capacity, of 555 mtpa by 2020. Whereas LNG demand from existing markets will be much lower than this, which can lead to surplus LNG capacity. However, emergence of new imports markets will nullify the excess LNG. 17 new markets are likely to enter LNG trading, adding up to a regasification capacity of 65 mtpa.

Further, uncertainty continues to prevail over LNG prices, probability of commencement of terminals and the impact of shale gas. Current recession in Europe coupled with lowered GDP growth rate in developing economies like India is also expected to impact LNG demand.

Amidst such uncertainties, the new report from LNGReports-“Global LNG Trends, Outlook and Business Prospects to 2020” provides realistic forecasts of supply and demand in near to long term future. It offers clear understanding of market dynamics, shift in trade flows, contracting patterns and LNG company strategies. It evaluates the pros and cons of investing in new projects and identifies potential investment markets. Further, opportunities in small and medium scale LNG and Floating LNG are evaluated.

Backed up by strong quantitative data, insights in the report aid you in formulation of your expansion, retention strategies and in merger and acquisition decisions. Feasibility of new terminals, latest trends and challenges along with short and long term outlook of all exporting and importing countries is discussed in detail.

Research and Analysis Highlights

Delays in realization of liquefaction capacity and widening scope of regasification will lead to a demand- supply gap of over 75 million tonnes in 2020.

17 regasification countries will foray into LNG trade by 2020, resulting in a total capacity increase of 65 mtpa

Of 100 LNG terminals scheduled for operation between 2012 and 2020, 23% will be floating in offshore seas.

Increasing LNG trade mandates addition of over 200 LNG carriers by 2020.

C3MR, optimized cascade, APX processes continue to be the dominating liquefaction technologies used in planned terminals in the near future.

Baltic and Black Seas, South East Asia, Emerging gas hubs, large geographies and export oriented markets to witness strong flow of investments in small and medium scale LNG industry

Strong demand from China and India along with traditional importers ensures that Asia Pacific markets will remain profitable and promising for LNG suppliers across the globe.

Over 316 mtpa of LNG is still available for sale purchase contracts in 2020

Qatar Petroleum and Korea Gas Corporation continue to dominate the global LNG industry.

Global cumulative LNG Capital Expenditure to exceed $300 billion between 2012 and 2015.

Scope

Global LNG report details 70 leading qualitative trends and challenges in 6 regional LNG markets backed up quantitative data forecasts in short to long term future

Detailed review of key events in 2011 LNG industry, with emphasis on impact of Japan nuclear shut down, European recession, shifting trade patterns, gas cartel plans, shale gas production, price fluctuations, investment & contracting patterns, supply-demand balance and others

Annual Quantitative and qualitative forecasts of liquefaction/regasification capacity, LNG exports and imports (supply-demand), contracted/spare capacity, fleet number and count, capital investment and competitive landscape from 2000 to 2020

Current status, investment details, start up of all planned LNG along with other details of operator, ownership, construction cost and period, capacity and location

Planned annual capital investment forecast for global, six regional and 25 countries from 2011 to 2015

Details of all active and planned contracts including vendor, purchaser, volume and importing and exporting countries to 2025

Competitive landscape and market structure including company wise LNG capacity forecasts to 2020 for top five companies in each region

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Scope of small scale LNG along with the impact of MARPOL act and also identifies potential growth markets

Emerging liquefaction and regasification markets along with probable entry, likely impact on existing companies

Reasons To Purchase

The report enables you to:

Gain clear understanding of current and future industry structure under current uncertain conditions through demand, supply, investment, infrastructure and competition forecasts

Analyze the impact of recent LNG dynamics on global, regional markets, companies, trade and investments

Make strategic decisions through more than 70 trends and outlook statements provided in the report

Identify potential opportunities for gas procurement, capacity reservations and asset investments

Evaluate key challenges and drivers of investing in each of the largest and emerging LNG markets

Evaluate planned projects using our feasibility analysis of planned projects and capital investment

Identify how new sectors like FLNG, small LNG, technologies and investments will emerge in near to medium future

Understand the demand and supply patterns of traditional markets along with the impact of upcoming markets

Stay ahead of competition by understanding business strategies, existing competitive landscape and futuristic statements of each LNG industry

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