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Global LNG Capital Investment Analysis and Outlook to 2020 - Widening Industry Scope Offers Huge Investment and Business Opportunities

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Abstracts

LNGANALYSIS have published the 2014 series of “GLOBAL LNG CAPITAL INVESTMENTS AND INDUSTRY OUTLOOK TO 2020”. The report ensures that LNG companies do not fall behind in the race to invest in LNG and that their investments are diverted to right and prospective locations. The research work provides complete analysis and annual outlook of leading 26 liquefaction and 34 regasification markets worldwide. With annual forecasts of likely capital investments in LNG projects from 2012 to 2020, the report provides the key drivers and restraints of investment forecasts during the period. Further, all potential investment opportunities in the global LNG industry along with their complete details are provided in the report.

Further, amidst the rush towards the floating LNG projects, the report analyzes the actual potential of global FLNG liquefaction and regasification markets worldwide. Region wise forecasts of FLNG investments are provided from 2012 to 2020. In addition, the report provides information on planned LNG projects in 52 LNG markets worldwide.

Some of the key facts discussed in the report include:

Global LNG capital investment continues to increase year on year driven by new projects and robust rise in demand. Despite supply tightness in the market, most countries are planning new regasification plants to gain from the US and Australian supplies in long term. Driven by emerging markets, change in trade patterns, Baltic Sea investments, developments in Australian projects, contracts with US suppliers, we expect over $500 billion to be spent on LNG projects by 2020. Of this, 74% will be spent on liquefaction industry and the rest on Regasification industry.

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The investments in LNG industry will be driven largely by Asia Pacific in the medium term and North America in the long term. Further, African countries are also planning strong investments to monetize their gas reserves. Europe on the other hand, is likely to witness low progress in the medium term but will be forced to increase its investments in LNG infrastructure over the long term period. South and Central America is also rapidly witnessing surge in LNG demand with increasing economies and shift towards the clean fuel.

Global LNG capital investment continues to increase year on year, summing up to around $500 Billion between 2014 and 2020

Over $75 Billion to be spent on FLNG Industry between 2012 and 2020

Asia Pacific continues to be the leading LNG investor in both liquefaction and regasification industry

Australia and United States are the preferred investment destinations across the world in the medium to long term

Strong GDP growth in China and India will ensure that these markets will remain profitable and promising for LNG suppliers across the globe.

Despite slow growth economy, European markets focusing investments in Floating LNG industry

The scope of South and Central America regasification industry continues to widen year, with over $12 billion to be invested

Most of the International oil and gas companies are focusing investments in East African countries, after recent success in exploration

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Contents

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9 NORTH AMERICA LNG CAPITAL INVESTMENT INDUSTRY OUTLOOK TO 2020

10 SOUTH AND CENTRAL AMERICA LNG CAPITAL INVESTMENT INDUSTRY OUTLOOK TO 2020

11 INVESTMENT AND BUSINESS OPPORTUNITIES IN GLOBAL LNG MARKETS

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List Of Tables

LIST OF TABLES

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About

However, the LNG imports are expected to remain low during the near term future due to lower GDP growth rates and higher LNG prices. Accordingly, we expect the European LNG imports to decline to 43.2 million tonnes by 2014. Over the long term, economic recovery, availability of the US and Australian LNG supplies and emergence of new import markets will lead to higher LNG demand. Accordingly, we expect the European LNG imports to stand at 104.4 million tonnes in 2020.

Global LNG liquefaction capacity increased steadily between 2005 and 2012. From 178.6 mtpa in 2005, global liquefaction capacity increased to 285.9 mtpa in 2012 at an average annual growth rate of 6.4%. Further, between 2012 and 2020, the capacity is expected to increase from 285.9 mtpa to 721.8 mtpa at an AAGR of 11.2%.

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