

# Power Generation: Liquefied natural gas is changing global power generation

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## Abstracts

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### SUMMARY

Liquefied Natural Gas (LNG) is beginning to change the nature of power generation in many countries around the world. No longer do two countries need to be joined by a pipeline - often accompanied by a litany of geopolitical issues, such as those involving Gazprom and Ukraine - for gas to be purchased and sold internationally. New importers of gas have popped up, along with new exporting nations, such as Australia. Transportable by ship, LNG provides a degree of flexibility to power mixes not previously possible. Now colossal sums of money are being put into large infrastructure projects to enable the full potential of LNG to be realized.

### KEY HIGHLIGHTS

Fundamental to fossil fuels such as gas and oil are the problems of how to transport vast quantities within a reasonable time frame and cost constraints. Solutions require the construction of pipelines; transportation via ship ramps up costs, limiting usage. But the development of LNG as a commercially viable alternative power source means the power mix of many countries around the world now has flexibility that has not previously been possible. Although many governments have made overtures towards reducing drastically the reliance upon fossil fuels for power, the reality many find themselves in requires an interim solution before renewables reach a sufficiently high stage of development for wider use.

During the last election, Mr. Moon, who would go on to be victorious, announced the intention to expand usage to 27% by 2030. (Renewables were set the target of 20% by 2030, up from 5% today). Success in South Korea has emboldened major producers to target countries that have previously enjoyed little or no gas supplies. However, the supermajors have been accused of attempting to create dependency in these new markets where none previously existed. The need to access new markets is being pushed by growth in production; global supplies are predicted to rise significantly during the coming years, conjuring the need for new markets.

Most gas importing nations have very limited options regarding the source of gas. Eastern Europe, for instance, is heavily dependent upon Russia and the state-owned Gazprom company. Even developed economies in Western Europe are exposed; many available gas fields in the local area have been operational for decades and are aging fast. For such areas of the globe, LNG solves that problem, at least partially.

## **SCOPE**

Examine what's happening in the power generation industry at present.

See how different technologies are adapting to a new business environment.

Learn which energy generation technologies are the strongest at present and the best option for countries.

Analyse the big trends in the industry and the players capitalising on them.

## **REASONS TO BUY**

What is happening in the power generation industry?

What are the most important new technologies?

Which countries are pushing new developments?

What power sources are most attractive at present?

How can countries meet their carbon emissions targets?

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Catalyst

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Liquefied Natural Gas is changing global power generation

Spread of LNG opens gas to new markets, causing major shifts in power generation

Entry of China as major importer is helping expansion of LNG as a source of power generation

Expansion of LNG opens global power generation industry to fresh players

Creation of trading hubs improves supply security, aiding growth in usage

Demand for LNG is expanding, requiring fresh infrastructure investment

Rising demand reveals future of LNG in global power generation is becoming more secure

Infrastructure development must continue at speed if LNG potential is to be realized

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