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The Floating Liquefied Natural Gas (FLNG) Market 2013-2023

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Abstracts

Floating Liquefied Natural Gas (FLNG) is composed of two segments: Floating Storage and Regasification Units (FSRUs) and LNG Floating Production Storage and Offloading Vessels (LNG FPSOs). The second segment is often referred to as the production side of the FLNG market.

Traditionally, LNG facilities have been built onshore, but this has become increasingly expensive in recent years, leading to the development of more cost effective solutions. Since 2005, Excelerate Energy, Golar LNG and H?egh LNG have taken ownership of FSRUs, and there are currently units operational in Europe, North America, South America, South East Asia and the Middle East. The introduction of further FSRUs will continue throughout the world, but particularly in areas where there are, at present, major gas shortfalls (e.g. India, Pakistan and Bangladesh). Strong, consistent CAPEX is expected throughout.

Floating liquefaction has been proposed as an economical solution to monetising stranded and associated gas, as well as a solution for the processing and liquefaction of onshore natural gas supplies. The latter proposal has arisen in answer to escalating onshore liquefaction costs and environmental, land use and royalty issues faced by onshore terminals. As of 2013, there are no floating liquefaction plants in operation, though Shell and Petronas have taken final investment decisions on projects for Australia and Malaysia. There is also a 0.5 million tonnes per annum floating liquefaction, regasification, storage and offloading vessel (FLRSU) approved for construction to be based offshore Colombia.

Despite only three vessels having received their final investment decisions, there are also a large number of designs at different stages of project development and visiongain

anticipates a number of final investment decisions will be taken over the next three years. The technical intricacies of constructing FLNG production facilities will ensure a build time of between three and five years depending on the design. There are more limitations on the LNG FPSO segment because of the unproven nature of the technology, high CAPEX and doubts about scalability. But assertions about the viability of the concept, from some of the most reputable companies in the oil and gas industry, represent an offer of assurance about the future.

Visiongain has determined that the value of the FLNG market in 2013 will reach $9.5bn.

What makes this report unique?

Visiongain consulted widely with industry experts and full transcripts from these exclusive interviews are included in the report. As such, the report has a unique blend of primary and secondary sources providing informed opinion. The report provides insight into key drivers and restraints behind the FLNG market, while also identifying current projects and future growth areas. The report also provides a unique blend of qualitative analysis combined with extensive quantitative data including global, submarket and national market forecasts from 2013-2023 - all highlighting key business opportunities.

Why you should buy The Floating Liquefied Natural Gas (FLNG) Market 2013-2023

- 209 pages of comprehensive analysis
- 2 Exclusive Visiongain interviews with experts from
  - Marsh
  - Linde
- 161 tables, charts, and graphs
- Global FLNG market forecasts between 2013-2023
- 2 Sub-Market Forecasts for 2013-2023:
  - LNG FPSOs
  - FSRUs

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8 Regional Forecasts for 2013-2023:

- Australasia
- South East Asia
- North America and the Caribbean
- Middle East
- South America
- Europe
- Asia
- Africa

5 Leading National Market Forecasts for 2013-2023:

- Australia
- Papua New Guinea
- Brazil
- Indonesia
- Malaysia

Within the regional market forecasts, analysis is conducted regarding the future outlook for FLNG in 31 different countries.

48 detailed tables of significant contracts, projects & programmes

A PEST analysis

3 leading companies (for FSRUs) and 2 leading groupings of companies (for LNG FPSOs) identified and profiled -

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H?egh LNG

Golar LNG

Excelerate Energy

Shell and Associates

Associates include: Samsung Heavy Industries (SHI) and Technip

Daewoo Shipbuilding and Marine Engineering (DSME) and Associates

Associates include: H?egh LNG, Petronas, KBR

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Gain an understanding of how to tap into the potential of this market by ordering The Floating Liquefied Natural Gas Market 2013-2023

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Figure 9.1 Global FLNG Market and Submarket CAPEX Forecast ($m, AGR%), 2013-2023

COMPANIES LISTED

4GasAsia
AES Gener
Air Products and Chemicals Inc
Anadarko
Andhra Pradesh Gas Distribution Corporation (APGDC)
API Group
API Nova Energia
BGT Limited
Black & Veatch
BP
BW Group
BW Maritimes
Cambridge Energy Group
CB&I Lummus
CH-IV International
Chevron
Citadel Capital
CNOOC
Colb·n
ConocoPhillips
Costain
Daewoo Shipbuilding and Marine Engineering (DSME)
Delek
Doris Engineering
Drydocks World
EDF (?lectricit? de France)
ENAGAS
ENI Group
EON Ruhrgas
Excelerate Energy
Exmar
ExxonMobil
FLEX LNG
FMC Technologies

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Frontline
GAIL - Indian State Owned Natural Gas Processing and Distribution Company
Gas Sayago
Gasfin
Gasol
Gastrade
Gazprom Marketing and Trading
GDF Suez
GE Oil and Gas
Golar LNG
Golar LNG Partners
Granherne
Hiranandani Electricity
H?egh LNG
H?egh LNG Holdings
Hudong Zhonghua
Hyundai Heavy Industries (HHI)
IHI Shipbuilding (IHI)
INPEX Corporation (INPEX)
Interoil
Isramco
Israel Electricity Corporation
Japan Australia LNG
JGC Corporation
Jordanian National Electricity and Power Company
KANFA Aragon
KBR
Keppel Offshore and Marine (Keppel)
Keppel Shipyard
KOGAS
Leif H?egh & Co
Levant LNG Marketing
Linde Group
Linde Process Plants Inc.
Liquid Niugini Gas Ltd.
LTL Group
Marsh
Marsh & McLennan Companies
Meridian Holdings Co.

Meta Petroleum Corporation
MISC
MODEC
Mubadala
Murphy Oil
Nexus Energy
Niche LNG
Noble Energy
OLT Offshore
Osaka Gas
Pacific LNG
Pacific Rubiales
Pangea LNG
PERTAMINA - State Oil Company of Indonesia
Perusahaan Gas Negara (PGN)
Petrobangla - National Oil Company of Bangladesh
Petrobras
PetroChina
Petromin PNG Holdings Limited
PETRONAS
PetroSA
PetroVietnam
Pinsent Masons LLP
PNG Floating LNG
Port Meridian Energy Ltd.
PT EMP Energi Indonesia
PT Tiara
PTT
PTTEP (Exploration and Production Division of the National Oil Company of Thailand)
PV Gas (Gas Division of PetroVietnam)
Qatargas
QInvest
Reliance Industries
RINA
Royal Dutch Shell
Royal Haskoning
RWE
Saipem
Samsung C&T

Samsung Heavy Industries (SHI)
Santos
Sasol
SBM Offshore
Sembawang
Shell Developments Australia
Sithe Global Power
State Oil Company of Azerbaijan Republican (SOCAR)
Statoil
Swan Energy
Tamar Partners
Technip
Teekay Corporation
TGE Gas Engineering
TGE Marine Engineering
Total
Toyo Engineering
Tractabel Engineering
Trans-European Energy B.V.
Wison Group
Wison Offshore and Marine
Woodside
WorleyParsons
Yantai Port Group Ltd

GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT

Ceylon Electricity Board
Exeter University
EU (European Union)
European Commission
Greek Public Gas Corporation (DEPA)
Jordan Ministry of Energy
Lebanon Ministry of Energy
National Gas Public Company of Cyprus (DEFA)
NOAA (National Oceanic and Atmospheric Administration)
OECD (Organisation for Economic Co-operation and Development)
Panama Energy Department

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RAE - Greek Energy Regulator
US Department of Energy
US Energy Information Administration (EIA)
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