

# Floating Liquefied Natural Gas (FLNG) Market Forecast 2014-2024

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## Abstracts

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 such as FLNG. The global market for floating liquefied natural gas (FLNG) can be divided into two distinct areas: LNG FPSOs (Liquefied Natural Gas Floating Production Storage and Offloading Vessels) and FSRUs (Floating Storage and Regasification Units). This report addresses both of these markets, quantifying the opportunity for growth expected over the next ten years.

Floating regasification vessels, in operation since 2005, allow for flexible transportation of LNG. Three companies: Excelerate Energy, Golar LNG and H2Tech LNG have taken the majority of ownership of floating regasification vessels thus far, although several other companies have begun to enter the market. There are currently 15 units operational in Asia, Europe, the Middle East, North America, South America, and Southeast Asia. Floating regasification vessels will be particularly useful in areas where there are, at present, major gas shortfalls (e.g. Egypt, India, Pakistan and Bangladesh). The introduction of further floating regasification vessels will continue throughout the world, however, since they are more economic and timely than land-based terminals.

Floating liquefaction has been proposed as an economical solution to monetising stranded and associated gas. As of 2014, there are no floating liquefaction plants in operation, though the Exmar and Pacific Rubiales vessel will commence operation off the northern coast of Columbia in mid 2015. Petronas' first vessel is also due to become commercially operational in late 2015 off the coast of Malaysia. However, the project garnering the most attention in the FLNG market is Shell's Prelude, due to come online by 2017 off the west coast of Australia. These three vessels represent the wide range of capacity floating liquefaction vessels can have: the Shell vessel is of the large variety,

producing over 3 million tonnes of LNG produced per annum (mmtpa). The Petronas vessel is of the medium-sized variety, and will produce 1-2 mmtpa, whereas the Exmar/Pacific Rubiales vessel will produce just 0.5 mmtpa. In addition to these three vessels, there are a number of conceptual designs at different stages of project development due to come online throughout the forecast period. Visiongain anticipates a handful of final investment decisions (FID) 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.

Visiongain values the global FLNG market at \$11.845bn in 2014. The FLNG market is forecast by visiongain to experience strong expansion over the next five years, reaching peak levels of CAPEX in 2018. In the second half of the 10-year forecast, visiongain forecasts that spending will decline slightly, but remain at similarly strong levels as the LNG value chain as a whole continues to grow.

### **Why you should buy Floating Liquefied Natural Gas (FLNG) Market Forecast 2014-2024: Prospects for Leading Companies in LNG FPSO & FSRU**

What is the future of the FLNG market? Visiongain's comprehensive analysis contains highly quantitative content delivering solid conclusions benefiting your analysis and illustrates new opportunities and potential revenue streams helping you to remain competitive. This definitive report will benefit your decision making and help to direct your future business strategy.

**We guarantee that you will receive key information which will benefit you in the following way:**

View global FLNG market forecasts and analysis from 2014-2024 to keep your knowledge ahead of your competition and ensure you exploit key business opportunities

The report provides detailed CAPEX projections of the market, the competitors, and the commercial drivers and restraints allowing you to more effectively compete in the market. In addition to market forecasts from 2014-2024, our new study shows current market data, market shares, original critical analysis, and revealing insight into commercial developments.

**Why struggle to find key market data? Why miss crucial information? Our comprehensive report provides instant market insight**

Our 228 page report provides 168 tables, charts, and graphs. Let our analysts present you with a thorough assessment of the current and future FLNG market prospects.

This analysis will achieve quicker, easier understanding. You will also gain from our analyst's industry expertise, allowing you to demonstrate your authority on the FLNG sector.

Visiongain is one of the few business intelligence companies that provides full transcripts of primary research company interviews. Be part of this knowledge. Learn what industry thought leaders are thinking. Leaders hold critical information

By reading the full transcript of exclusive expert opinion interview contained in the report you will keep up to speed with what is really happening in the industry. Don't fall behind. You will gain a thorough knowledge on the FLNG sector finding strategic advantages for your work and will learn how your organisation can benefit - allowing you to assess prospects for investments and sales:

EXMAR Marine NV

### **Discover CAPEX forecasts for the key submarkets from 2014-2024**

What are the dynamics driving the FLNG industry? How will the market expand? Which submarkets will see the greatest levels of growth? Use our forecasts and expert insight to grow your business and give you more industry influence. Find where you can gain and how your organisation can succeed. Stay informed about the potential for each of these FLNG submarkets with individual forecasts and analysis from 2014-2024:

LNG FPSO forecast 2014-2024

FSRU forecast 2014-2024

Understand the prospects for the leading regional and national FLNG markets - where will the highest CAPEX spending and opportunities occur?

Learn about the market potential for FLNG companies in the developed and developing

countries and regions, from 2014 onwards. You will see where and how opportunities exist with revealing individual market forecasts and analysis from 2014-2024 for 8 regional markets and 5 leading national and sub-regional markets:

Australasia forecast 2014-2024

Africa forecast 2014-2024

Asia forecast 2014-2024

Southeast Asia forecast 2014-2024

Europe forecast 2014-2024

Middle East forecast 2014-2024

South America forecast 2014-2024

North America and Caribbean forecast 2014-2024

Australia forecast 2014-2024

Malaysia forecast 2014-2024

Indonesia forecast 2014-2024

Brazil Asia forecast 2014-2024

Other South American Countries forecast 2014-2024

In addition to these markets, the outlook for FLNG in 30 other national markets is analysed within the regional forecasts.

You will be provided with 24 contract tables detailing the status of all current and potential FLNG projects, including information on costs and likely start dates.

For each of the regional markets you will be provided with a breakdown of CAPEX spending on the LNG FPSO and FSRU submarkets, as well as graphs forecasting

liquefaction and regasification capacities.

Explore the factors affecting project developers and constructors. Learn about the forces influencing market dynamics.

Explore the political, economic, social, and technological (PEST) issues assessing market advances. Discover what the present and future outlook for business will be. Learn about the following business critical issues:

Business strategy

Technological issues and constraints

Supply and demand dynamics

Increasing specialisation by leading players

Increasing industry consolidation

Analysis of barriers to entry

Demographic changes

### **Identify who the leading companies are in the FLNG industry**

Our report reveals the technologies and companies which hold the greatest potential. Prospects for advances in the FLNG industry are strong, and from 2014 it holds many opportunities for growth. View visiongain's assessment of the prospects for established competitors, rising companies, and new market entrants. Our work explains that potential, helping you stay ahead. Gain a thorough understanding of the competitive landscape with profiles of eight leading FLNG companies examining their positioning, capabilities, product portfolios, R&D activity, services, focus, strategies, M&A activity, and future outlook.

Excelerate Energy

Heqh LNG

Golar LNG

Shell

Petronas

Daewoo Shipbuilding and Marine Engineering (DSME)

Samsung Heavy Industries

Hyundai Heavy Industries

View market share breakdowns for the three leading companies in the FSRU submarket

Discover Information found nowhere else in this independent assessment of the FLNG market

The Floating Liquefied Natural Gas (FLNG) Market Forecast 2014-2024: Prospects for Leading Companies in LNG FPSO & FSRU report provides impartial FLNG sector analysis. With the independent business intelligence found only in our work, you will discover where the prospects are for profit. In particular, our new research provides you with key strategic advantages: Our informed forecasts, independent and objective analysis, exclusive interviews and revealing company profiles will provide you with that necessary edge, allowing you to gain ground over your competitors.

With this report you are less likely to fall behind in knowledge or miss crucial business opportunities. You will save time and receive recognition for your market insight. See how this report could benefit and enhance your research, analysis, company presentations and ultimately your individual business decisions and your company's prospects.

### **What makes this report unique?**

Visiongain consulted widely with leading industry experts and a full transcript from an exclusive interview with EXMAR Marine is included in the report. Visiongain's research methodology involves an exclusive blend of primary and secondary sources providing informed analysis. This methodology allows insight into the key drivers and restraints

behind market dynamics and competitive developments. The report therefore presents an ideal balance of qualitative analysis combined with extensive quantitative data including global, submarket, regional and national market forecasts from 2014-2024

### **Why choose visiongain business intelligence?**

Visiongain's increasingly diverse sector coverage strengthens our research portfolio. The growing cross-sector convergence of key verticals and the interplay of game changing technologies across hitherto unrelated industries are creating new synergies, resulting in new business opportunities for you to leverage.

As such, visiongain's team of London based in-house analysts offer a wealth of knowledge and experience to inform your strategic business decisions. Let visiongain guide you.

How the Floating Liquefied Natural Gas (FLNG) Market Forecast 2014-2024: Prospects for Leading Companies in LNG FPSO & FSRU report can benefit you

Visiongain's report is for anyone requiring analysis of the FLNG market. You will discover market forecasts, technological trends, predictions and expert opinion providing you with independent analysis derived from our extensive primary and secondary research. Only by purchasing this report will you receive this critical business intelligence revealing where revenue growth is likely and where the lucrative potential market prospects are. Don't miss this key opportunity to gain a competitive advantage.

Avoid falling behind your competitors, overlooking critical business opportunities or losing industry influence. In our new report you will discover forecasts from 2014-2024 at the global, submarket, regional and national level. The report also assesses technologies, competitive forces and expected product pipeline developments.

If you buy our report today your knowledge will stay one step ahead of your competitors. Discover how our report could benefit your research, analyses and strategic decisions, saving you time. To gain an understanding of how to tap into the potential of this market and stay one step ahead of the competition you must order now our report Floating Liquefied Natural Gas (FLNG) Market Forecast 2014-2024: Prospects for Leading Companies in LNG FPSO & FSRU. Avoid missing out - order our report now.



## Contents

### **1. EXECUTIVE SUMMARY**

- 1.1 Global FLNG Market Overview
- 1.2 Benefits of This Report
- 1.3 Who is This Report For?
- 1.4 Methodology

### **2. INTRODUCTION TO THE FLNG MARKET**

- 2.1 FLNG Market Structure Overview
- 2.2 FLNG Vessels
  - 2.2.1 Regasification Vessels
  - 2.2.2 Liquefaction Vessels
- 2.3 FLNG Technology
  - 2.3.1 Brief History of FLNG
  - 2.3.2 Regasification
  - 2.3.3 Liquefaction
- 2.4 FLNG's Increasing Preferability

### **3. GLOBAL FLNG MARKET FORECAST 2014-2024**

- 3.1 Summary of Global FLNG Market Determinants
- 3.2. FLNG Market Drivers & Restraints
  - 3.2.1 Drivers in the FLNG Market
    - 3.2.1.1 Increasing Demand for Natural Gas
    - 3.2.1.2 Arbitrage Opportunity
    - 3.2.1.3 Desire to Increase Energy Security
    - 3.2.1.4 Avoid Security Challenges
    - 3.2.1.5 Nuclear Phase Out
    - 3.2.1.6 Monetisation of Stranded and Unused Gas
    - 3.2.1.7 LNG versus Pipeline Economics
    - 3.2.1.8 Economic Flexibility of LNG
    - 3.2.1.9 FLNG Deployment Speed and Cost
    - 3.2.1.10 Improvements in Subsea Technologies
    - 3.2.1.11 Deeper Water
  - 3.2.2 Restraints in the FLNG Market
    - 3.2.2.1 Securing Contracts, Insurance and Project Finance



- 3.2.2.2 High Capital Expenditure
- 3.2.2.3 Shipyard Capacity
- 3.2.2.4 FLNG Complexity
- 3.2.2.5 Unconventional Gas Reserves
- 3.2.2.6 Logistics and Extreme Weather
- 3.2.2.7 No Universal Gas Pricing Index

## **4. FLNG SUBMARKETS 2014-2024**

- 4.1 FLNG Submarket Forecasts 2014-2024
  - 4.1.1 Submarket Comparison and Analysis
- 4.2 LNG FPSO Submarket Forecast 2014-2024
  - 4.2.1 LNG FPSO Market Drivers & Restraints
  - 4.2.2 LNG FPSO Projects
  - 4.2.3 LNG FPSO Production Capacity Forecast
- 4.3 FSRU Submarket Forecast 2014-2024
  - 4.3.1 FSRU Market Drivers & Restraints
  - 4.3.2 FSRU Projects - Operational and Potential
  - 4.3.3 FSRU Regasification Capacity Forecast

## **5. LEADING REGIONAL AND NATIONAL FLNG MARKETS 2014-2024**

- 5.1 Regional FLNG Market Share Forecast 2014-2024
- 5.2 FLNG Market Barriers to Entry Analysis
- 5.3 The Australasian FLNG Market Forecast 2014-2024
  - 5.3.1 The Australian FLNG Market Forecast 2014-2024
    - 5.3.1.1 Australian FLNG Projects
    - 5.3.1.2 Australian FLNG Market Drivers & Restraints
    - 5.3.1.3 Australian FLNG Political Considerations
  - 5.3.2 Other Countries in the Australasian FLNG Market
  - 5.3.3 Australasian LNG FPSO Production Capacity Forecast
- 5.4 The African FLNG Market Forecast 2014-2024
  - 5.4.1 Equatorial Guinean FLNG Outlook
  - 5.4.2 Other West African FLNG Outlook
  - 5.4.3 South African FLNG Outlook
  - 5.4.4 Tanzanian FLNG Outlook
  - 5.4.5 African FLNG Market Drivers & Restraints
  - 5.4.6 African FLNG Projects
  - 5.4.7 African LNG FPSO Production Forecast

- 5.5 The Asian FLNG Market Forecast 2014-2024
  - 5.5.1 Bangladesh FLNG Outlook
  - 5.5.2 Chinese FLNG Outlook
  - 5.5.3 Indian FLNG Outlook
  - 5.5.4 Pakistani FLNG Outlook
  - 5.5.5 Sri Lankan FLNG Outlook
  - 5.5.6 Asian FLNG Market Drivers & Restraints
  - 5.5.7 Asian FLNG Projects
  - 5.5.8 Asian FSRU Regasification Capacity Forecast
- 5.6 The Southeast Asian FLNG Market Forecast 2014-2024
  - 5.6.1 The Malaysian FLNG Market Forecast 2014-2024
    - 5.6.1.1 Malaysian FLNG Market Drivers & Restraints
    - 5.6.1.2 Malaysian FLNG Projects
  - 5.6.2 The Indonesian FLNG Market Forecast 2014-2024
    - 5.6.2.1 Indonesian FLNG Market Drivers & Restraints
    - 5.6.2.2 Indonesian FLNG Projects
  - 5.6.3 Other Countries in the Southeast Asian FLNG Market
    - 5.6.3.1 Vietnamese FLNG Outlook
    - 5.6.3.2 Filipino FLNG Outlook
    - 5.6.3.3 Other Southeast Asian FLNG Projects
- 5.7 The European FLNG Market Forecast 2014-2024
  - 5.7.1 Cypriot FLNG Outlook
  - 5.7.2 Greek FLNG Outlook
  - 5.7.3 Italian FLNG Outlook
  - 5.7.4 Lithuanian FLNG Outlook
  - 5.7.5 Turkish FLNG Outlook
  - 5.7.6 UK FLNG Outlook
  - 5.7.7 Ukraine FLNG Outlook
  - 5.7.8 European FLNG Market Drivers & Restraints
  - 5.7.9 European FLNG Projects
  - 5.7.10 European FSRU Regasification Capacity Forecast
- 5.8 The Middle Eastern FLNG Market Forecast 2014-2024
  - 5.8.1 Egyptian FLNG Outlook
  - 5.8.2 Israeli FLNG Outlook
  - 5.8.3 Jordanian FLNG Outlook
  - 5.8.4 Kuwaiti FLNG Outlook
  - 5.8.5 Lebanese FLNG Outlook
  - 5.8.6 UAE FLNG Outlook
  - 5.8.7 Middle Eastern FLNG Market Drivers & Restraints

- 5.8.8 Middle Eastern FLNG Projects
- 5.8.9 Middle Eastern FSRU Regasification Capacity Forecast
- 5.9.10 Middle Eastern LNG FPSO Production Capacity Forecast
- 5.9 The South American FLNG Market Forecast 2014-2024
  - 5.9.1 The Brazilian FLNG Market Forecast 2014-2024
    - 5.9.1.1 Brazilian FLNG Market Drivers & Restraints
    - 5.9.1.2 Brazilian FLNG Projects
  - 5.9.2 Other South American FLNG Markets
    - 5.9.2.1 Argentine FLNG Outlook
    - 5.9.2.2 Chilean FLNG Outlook
    - 5.9.2.3 Colombian FLNG Outlook
    - 5.9.2.4 Uruguay FLNG Outlook
    - 5.9.2.5 Other South American FLNG Market Drivers & Restraints
    - 5.9.2.6 Other South American FLNG Market Projects
  - 5.9.3 South American FSRU Regasification Capacity Forecast
- 5.10 The North American and Caribbean FLNG Market Forecast 2014-2024
  - 5.10.1 Canadian FLNG Outlook
  - 5.10.2 Guadeloupe and Martinique FLNG Outlook
  - 5.10.3 Jamaican FLNG Outlook
  - 5.10.4 Puerto Rican FLNG Outlook
  - 5.10.5 US FLNG Outlook
  - 5.10.6 North American and Caribbean FLNG Market Drivers & Restraints
  - 5.10.7 North American and Caribbean FLNG Projects
  - 5.10.8 North American LNG FPSO Production Capacity Forecast

## **6. PEST ANALYSIS OF THE FLNG MARKET 2014-2024**

## **7. EXPERT OPINION**

### **7.1 EXMAR**

- 7.1.1 EXMAR and the FLNG Market
- 7.1.2 Floating Regasification versus Floating Liquefaction
- 7.1.3 Large and Small Scale FLNG
- 7.1.4 Important Regions for FLNG
- 7.1.5 The FLNG Market: Risks and Challenges
- 7.1.6 FLNG Market Restraints
- 7.1.7 Vessel Costs

## **8. LEADING COMPANIES IN THE FLNG MARKET**

## 8.1 Leading Companies in the FSRU Market

### 8.1.1 Excelerate Energy

#### 8.1.1.1 Excelerate Products and Services

#### 8.1.1.2 Analysis of Excelerate Energy within the FLNG Market

#### 8.1.1.3 Excelerate M&A Activity

#### 8.1.1.4 Future Outlook for Excelerate Energy

#### 8.1.1.5 Excelerate LNG FPSO Projects

### 8.1.2 Golar LNG

#### 8.1.2.1 Golar Products and Services

#### 8.1.2.2 Analysis of Golar LNG within the FLNG Market

#### 8.1.2.3 Future Outlook for Golar LNG

#### 8.1.2.4 Golar Projects

### 8.1.3 Hegh LNG

#### 8.1.3.1 Hegh Products and Services

#### 8.1.3.2 Analysis of Hegh LNG within the FLNG Market

#### 8.1.3.3 Hegh M&A Activity

#### 8.1.3.4 Future Outlook for Hegh

#### 8.1.3.5 Hegh Projects

## 8.2 Leading Companies in the LNG FPSO Market

### 8.2.1 Shell and Associates

#### 8.2.1.1 Analysis of Shell and Associates in the FLNG Market

#### 8.2.1.2 Future Outlook of Shell and Associates

#### 8.2.1.3 Shell and Associates Projects

### 8.2.2 Petronas

#### 8.2.2.1 Analysis of Petronas in the FLNG Market

#### 8.2.2.2 Petronas LNG FPSO Projects

### 8.2.3 Other Noteworthy LNG FPSO Developers

## 8.3 Leading FLNG Constructors

### 8.3.1 DSME and Associates

#### 8.3.1.1 Analysis of DSME in the FLNG Market

#### 8.3.1.2 DSME and Associates Future Outlook

#### 8.3.1.3 DSME and Associates Projects

### 8.3.2 Samsung Heavy Industries (SHI)

#### 8.3.2.1 Samsung Heavy Industries Future Outlook

#### 8.3.2.2 Samsung Heavy Industries Projects

### 8.3.3 Hyundai Heavy Industries (HHI)

#### 8.3.3.1 Hyundai Heavy Industries Future Outlook

#### 8.3.3.2 Hyundai Heavy Industries Projects

## 8.4 Leading Service Providers in the FLNG Market

8.4.1 Black & Veatch

8.4.2 JGC Corporation

8.4.3 KBR

8.4.4 Saipem

8.4.5 Technip

8.4.6 Wison Offshore & Marine

## 8.5 Other Companies in the FLNG Market

# 9. CONCLUSIONS

## 9.1 Global FLNG Market Outlook

## 9.2 Key Findings

9.2.1 LNG FPSO Submarket

9.2.2 FSRU Submarket

9.2.3 Regional and Leading National FLNG Markets

# 10. GLOSSARY

## List Of Tables

### LIST OF TABLES

Table 2.1 FSRUs in Operation, 2014 (Owner, Location)
Table 3.1 Global FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 3.2 Regional & Leading National FLNG Markets Forecast 2014-2024 (\$m, AGR %)
Table 3.3 FLNG Market Drivers & Restraints 2014-2024
Table 4.1 FLNG Submarket Forecasts 2014-2024 (\$m, AGR %)
Table 4.2 LNG FPSO Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 4.3 LNG FPSO Market Drivers & Restraints
Table 4.4 Planned LNG FPSO Projects (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))
Table 4.5 FSRU Submarket Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 4.6 FSRU Market Drivers & Restraints
Table 4.7 Current FSRU Fleet (Owner, Constructor/Converter, MMTPA, Location, Vessel Name, Cost (\$m))
Table 4.8 Planned FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$m))
Table 4.9 Scheduled FSRU Deliveries with No Specified Destination (Main Sponsor(s), Constructor/Converter, MMTPA, Earliest Operation, Location, Est. Cost (\$m))
Table 5.1 Regional & Leading National FLNG Markets Forecast 2014-2024 (\$m, AGR %)
Table 5.2 Australasian FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 5.3 Australian FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 5.4 Australian FLNG Market Drivers & Restraints
Table 5.5 Australian LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Cost (\$bn))
Table 5.6 African FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)
Table 5.7 African FLNG Market Drivers & Restraints
Table 5.8 Planned African FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))
Table 5.9 Planned African LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 5.10 Asian FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.11 Asian FLNG Market Drivers & Restraints

Table 5.12 Current Asian FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 5.13 Planned Asian FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.14 Southeast Asian FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.15 Malaysia FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.16 Malaysia FLNG Market Drivers & Restraints

Table 5.17 Current Malaysian FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name)

Table 5.18 Planned Malaysian LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 5.19 Indonesian FLNG Market Forecast 2013-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.20 Indonesia FLNG Market Drivers & Restraints

Table 5.21 Current Indonesian FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name)

Table 5.22 Planned Indonesian FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.23 Planned Other Southeast Asian FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.24 European FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.25 European FLNG Market Drivers & Restraints

Table 5.26 Current European FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 5.27 Planned European FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.28 Planned European LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 5.29 Middle East FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.30 Middle East FLNG Market Drivers & Restraints

Table 5.31 Current Middle Eastern FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))



Table 5.32 Planned Middle Eastern FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.33 Planned Middle Eastern LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 5.34 South American FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.35 Brazilian FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.36 Brazilian FLNG Market Drivers & Restraints

Table 5.37 Current Brazilian FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 5.38 Planned Brazilian FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.39 Other South American FLNG Markets Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.40 Other South American FLNG Markets Drivers & Restraints

Table 5.41 Current Other South American FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 5.42 Planned Other South American FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.43 Planned Other South American LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 5.44 North American and Caribbean FLNG Market Forecast 2014-2024 (\$m, AGR %, CAGR%, Cumulative)

Table 5.45 North American and Caribbean FLNG Market Drivers & Restraints

Table 5.46 Current North American FSRUs (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 5.47 Planned North American FSRU Projects (Owner (Main Sponsor), MMTPA, Earliest Operation, Location, Vessel Name, Estimated Cost (\$m))

Table 5.48 Planned North American LNG FPSO Projects (Sponsor, Constructor, MMTPA, Status, Earliest Operation, Location, Estimated Cost (\$bn))

Table 6.1 PEST Analysis of the FLNG Market 2014-2024

Table 8.1 Leading 3 FSRU Companies (Company, 2013 CAPEX on FSRUs (\$m), 2013 FSRU CAPEX Market Share (\$m))

Table 8.2 Excelerate Energy Overview (FSRU CAPEX, \$m (new orders 2013), Global FSRU CAPEX Share % (2013), Headquarters, Contact, Website)

Table 8.3 Excelerate Products and Services (Product/Service, Notes)

Table 8.4 Current FSRU Owned by Excelerate (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 8.5 Excelerate's Planned FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost

Table 8.6 Excelerate's Planned FSRU Newbuilds and Conversions without Destination (Future Owner, MMTPA, Est. Cost (\$m), Earliest Commission/Status,

Table 8.7 Planned LNG FPSO Projects Involving Excelerate (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.8 Golar LNG Overview (FSRU CAPEX, \$m (new orders 2013), Global FSRU CAPEX Share % (2013), Total Revenue (2013), Headquarters, Ticker, IR Contact, Website)

Table 8.9 Golar Products and Services (Product/Service, Notes)

Table 8.10 Current FSRU Owned by Golar (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 8.11 Golar's Planned FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost

Table 8.12 Golar's Planned FSRU Newbuilds and Conversions without Destination (Main Sponsor, Constructor, MMTPA, Earliest Operation, Location, Vessel Name/Note, Estimated Cost (\$m)

Table 8.13 Hgh LNG Overview (FSRU CAPEX, \$m (new orders 2013), Global FSRU CAPEX Share % (2012), Total Revenue (2011), Headquarters, Ticker, IR Contact, Website)

Table 8.14 Hgh Products and Services (Product/Service, Notes)

Table 8.15 Current FSRU Owned by Hgh (Owner, Constructor, MMTPA, Location, Vessel Name, Estimated Cost (\$m))

Table 8.16 Hgh's Planned FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost

Table 8.17 Hgh's Planned FSRU Newbuilds and Conversions without Destination (Main Sponsor, Constructor, MMTPA, Earliest Operation, Location, Vessel Name/Note, Estimated Cost (\$m)

Table 8.18 Planned LNG FPSO Projects Involving Hgh (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.19 Shell and Associates Revenue (2013), Shell Headquarters, Shell Ticker, Shell IR Contact, Shell Website)

Table 8.20 Shell and Associates Planned LNG FPSO Projects (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.21 PETRONAS Revenue (2013), PETRONAS Headquarters, PETRONAS Ticker, PETRONAS IR Contact, PETRONAS Website)

Table 8.22 PETRONAS Planned LNG FPSO Projects (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.23 DSME and Associates Revenue (2011), DSME Headquarters, DSME Ticker,

DSME IR Contact, DSME Website)

Table 8.24 Current FSRU Fleet Built by DSME and Associates (Owner, Constructor/Converter, MMTPA, Location, Vessel Name, Cost (\$m))

Table 8.25 Planned DSME and Associates FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.26 Scheduled DSME FSRU Deliveries with No Specified Destination (Main Sponsor(s), Constructor/Converter, MMTPA, Earliest Operation, Note, Est. Cost (\$m))

Table 8.27 Planned DSME LNG FPSO Projects (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.28 SHI Revenue (2013), Headquarters, Ticker, IR Contact, Website

Table 8.29 Current FSRU Fleet Built by SHI (Owner, Constructor/Converter, MMTPA, Location, Vessel Name, Cost (\$m))

Table 8.30 Planned SHI FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.31 Scheduled SHI FSRU Deliveries with No Specified Destination (Main Sponsor(s), Constructor/Converter, MMTPA, Earliest Operation, Note, Est. Cost (\$m))

Table 8.32 Planned SHI LNG FPSO Projects (Main Sponsor(s), Constructor, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.33 Revenue (2012), HHI Headquarters, HHI Ticker, DSME IR Contact, DSME Website)

Table 8.34 Planned HHI FSRU Newbuilds and Conversions (Main Sponsor(s), Constructor/Converter, MMTPA, Status, Earliest Operation, Location (Field), Est. Cost (\$bn))

Table 8.35 Scheduled HHI FSRU Deliveries with No Specified Destination (Main Sponsor(s), Constructor/Converter, MMTPA, Earliest Operation, Location, Est. Cost (\$m))

Table 8.36 Other Companies in the FLNG Market (Company Name, Product/Service)

## List Of Figures

### LIST OF FIGURES

Figure 2.1 Global FLNG Market Structure Overview

Figure 2.2 Simplified Flow Diagram of the Liquefaction Process

Figure 2.3 LNG Price \$/mmbtu, January-December 2013; US, EU & Japan (HH, LNG Import Price, LNG Import Price)

Figure 2.4 LNG Price \$/mmbtu, January 2007-January 2012; US, UK & Japan (HH, NBP, LNG Import Price)

Figure 2.5 Flaring by Country and Worldwide (bcm), 2007-2011

Figure 3.1 Global FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 3.2 Global FLNG Market and Submarket CAGRs (%) 2014-2019, 2019-2024 and 2014-2024

Figure 3.3 FLNG Regions, Total Market CAPEX (\$m), 2014-2024

Figure 3.4 FLNG Market Forecast (\$m) by Regional Market (2014-2024)

Figure 3.5 FLNG Market Forecast (\$m) by Regional Market (without Australia) (2014-2024)

Figure 3.6 FLNG Market Share Percentage Change (%), 2014-2024

Figure 3.7 Henry Hub & Alberta (AECO-C) Natural Gas Spot Price (\$/MMBtu), 2003-2013

Figure 3.8 Top 10 LNG Exporter Countries (Million Tons), 2012

Figure 3.9 World Natural Gas Consumption Forecast, 2010-2040 (Trillion Cubic Feet)

Figure 3.10 World Energy-Related Carbon Dioxide Emissions by Fuel Type, 1990-2040 (Billion Metric Tons)

Figure 3.11 Greenhouse Gases and Harmful Emissions: Coal and Natural Gas Compared (Parts per Million)

Figure 3.12 Global Shale Gas Resources by Region (Trillion Cubic Feet)

Figure 3.13 Average Gas Prices in the US, Europe and Japan, 1990-2011 (\$/mmbtu)

Figure 4.1 Global FLNG Market and Submarket CAPEX Forecast (\$m, AGR%), 2014-2024

Figure 4.2 FLNG Submarket CAPEX Share Forecast 2014 (%)

Figure 4.3 FLNG Submarket CAPEX Share Forecast 2019 (%)

Figure 4.4 FLNG Submarket CAPEX Share Forecast 2024 (%)

Figure 4.5 FLNG Submarket CAPEX Forecast (\$m), 2014-2024

Figure 4.6 LNG FPSO Forecast 2014-2024 (\$m, AGR%)

Figure 4.7 LNG FPSO Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 4.8 LNG FPSO Fleet Production Capacity, 2014-2019 (mmtpa), Very Likely and Potential

Figure 4.9 FSRU Submarket Forecast 2014-2024 (\$m, AGR%)

Figure 4.10 FSRU Submarket Share Forecast 2014, 2019 and 2024 (% Share)

Figure 4.11 US LNG Import, January 2003 - December 2013 (mmcf per month)

Figure 4.12 FSRU Fleet Regasification Capacity, 2014-2019 (mmtpa), Very Likely and Potential

Figure 5.1 Regional FLNG Markets Forecast 2014-2024 (\$m)

Figure 5.2 Regional FLNG Markets Share Forecast 2014 (%)

Figure 5.3 Regional FLNG Markets Share Forecast 2019 (%)

Figure 5.4 Regional FLNG Markets Share Forecast 2024 (%)

Figure 5.5 Barriers to Entry vs. Regional Market Size vs. CAGR% 2014 (\$m, CAGR%)

Figure 5.6 Australasian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.7 Australasian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.8 Australian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.9 Australian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.10 Australasian LNG FPSO Fleet Production Capacity, 2014-2024 (mmtpa)

Figure 5.11 African FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.12 African FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.13 African LNG FPSO Fleet Production Capacity, 2014-2024 (mmtpa)

Figure 5.14 Asian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.15 Asian FLNG Market Share Forecast 2019, 2019 and 2024 (% Share)

Figure 5.16 Asian FSRU Fleet Regasification Capacity, 2014-2019 (mmtpa)

Figure 5.17 Southeast Asian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.18 Southeast Asian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.19 Malaysian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.20 Malaysian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.21 Indonesian FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.22 Indonesian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.23 European FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.24 European FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.25 European FSRU Fleet Regasification Capacity, 2014-2019 (mmtpa)

Figure 5.26 Middle East FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.27 Middle East FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.28 Middle Eastern FSRU Fleet Regasification Capacity, 2014-2019 (mmtpa)

Figure 5.29 Middle Eastern LNG FPSO Fleet Production Capacity, 2014-2019 (mmtpa)

Figure 5.30 South American FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.31 South American FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.32 Brazilian FLNG Market Forecast 2014-2024 (\$m, AGR%)



Figure 5.33 Brazilian FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.34 Other South American FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.35 Other South American FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.36 South American FSRU Fleet Regasification Capacity, 2014-2019 (mmtpa)

Figure 5.37 North American and Caribbean FLNG Market Forecast 2014-2024 (\$m, AGR%)

Figure 5.38 North American and Caribbean FLNG Market Share Forecast 2014, 2019 and 2024 (% Share)

Figure 5.39 North American LNG FPSO Fleet Production Capacity, 2014-2024 (mmtpa)

Figure 8.1 Leading 3 Companies in the FSRU CAPEX Market Share 2013 (% Share)

## **COMPANIES LISTED**

4Gas Asia

AB Klaipedos Nafta

AES Gener

Air Products and Chemicals Inc

Anadarko

Andhra Pradesh Gas Distribution Corporation (APGDC)

Apache Corporation

API Group

API Nova Energia

Astra Oil

Avner Oil & Gas Exploration

BG Group Plc

BGT Limited

BHP Billiton

Black and Veatch

BP

Browse Joint Venture

BW Group

BW Maritime

Cambridge Energy Group

CB&I Lummus

CE LNG - Cambridge Energy LNG

Chevron

Citadel Capital

CNOOC (China National Offshore Oil Corporation)

Colbourn SA  
ConocoPhillips  
Costain  
Cove Energy  
Daewoo Shipbuilding and Marine Engineering (DSME)  
DEFA, Cyprus  
DEPA (Dimosia Epichirisi Paroxis Aeriou) - Greek Public Natural Gas Corporation  
Delek Drilling  
Delphin LNG  
DorGas Exploration  
Doris Engineering  
Douglas Channel Energy Partnership (DCEP)  
DCEP Gas Management Ltd.  
Douglas Channel LNG Assets Partnership  
Drydocks World  
EDF (Electricit  de France)  
ENI Group  
Excelerate Energy  
Excelerate Liquefaction Solutions  
Exmar NV  
ExxonMobil  
Fairwood Group  
FLEX LNG  
FMC Technologies  
Freeport-McMoRan Energy (FME)  
Frontline  
GAIL - Indian State Owned Natural Gas Processing and Distribution Company  
Gas Sayago  
Gasfin  
Gasol Plc  
Gastrade  
Gazprom  
Gazprom Marketing and Trading  
GDF Suez  
GE Oil & Gas  
Golar LNG  
Golar LNG Partners  
Granherne  
Haisla Nation Limited Partnership (HNLP)



Hiranandani Electricity  
Hegh LNG  
Hegh LNG Holdings  
Hudong Zhonghua  
Hyundai Heavy Industries (HHI)  
IHI Shipbuilding (IHI)  
INPEX Corporation (INPEX)  
Interoil  
Israel Electricity Corporation  
Isramco Negev 2 Limited Partnership  
JGC Corporation  
Jordanian National Electricity and Power Company  
KANFA Aragon  
KBR  
Keppel Offshore and Marine (Keppel)  
KNPC (Kuwait National Petroleum Company)  
Kogas  
Leif Hegh & Co  
Linde Group  
Liquid Niugini Gas Ltd.  
LNG BargeCo BVBA  
LNG Partners  
LTL Group (Lanka Transformer Ltd Group)  
Marsh  
Meridian Holdings Co.  
MIMI - Mitsubishi and Mitsui's Japan Australia LNG joint venture  
Mitsubishi  
Mitsui Japan Australia LNG  
Mitsui O.S.K. Lines (MOL)  
MISC  
MODEC  
Mubadala Petroleum  
Murphy Oil  
Nexus Energy  
Noble Energy  
Oil and Natural Gas Corp. Ltd  
OLT Offshore  
Ophir Energy Plc  
Osaka Gas

Pacific LNG  
Pacific Rubiales  
Pacific Midstream Holding Corp  
Pangea LNG  
Paradip Port Trust  
Pertamina - State Oil Company of Indonesia  
PGN (Perusahaan Gas Negara PGN)  
Peninsula Group  
Petrobangla - National Oil Company of Bangladesh  
Petrobras  
Petromin PNG Holdings Limited  
Petronas  
PetroSA  
Petrovietnam  
Pinsent Masons LLP  
Port Meridian Energy Ltd.  
PT EMP Energi Indonesia  
PTT  
PTTEP (Exploration and Production Division of the National Oil Company of Thailand)  
PV Gas (Gas Division of PetroVietnam)  
Ratio Oil Exploration  
Reliance Industries Limited  
Royal Dutch Shell  
Royal Haskoning  
RWE  
Saipem  
Samsung C&T  
Samsung Heavy Industries (SHI)  
Santos  
Sasol  
SBM Offshore  
Sembawang  
Shell Developments Australia  
Statoil  
Swan Energy  
Technip  
Teekay Corporation  
TGE Gas Engineering  
TGE Marine Engineering

Total  
Toyo Engineering  
United LNG  
VGS Group Inc (Vessel Gasification Solutions)  
Wison Group  
Wison Offshore and Marine  
Woodside Petroleum  
Worley Parsons  
Yantai Port Group Ltd

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European Commission  
Filipino Department of Energy  
Greek Public Gas Corporation (DEPA)  
Haisla Nation  
International Court of Justice  
Jordan Ministry of Energy  
Lebanon Ministry of Energy and Water  
LNG Allies  
Ministry of State Enterprises - Portal Nasional Indonesia  
National Gas Public Company of Cyprus (DEFA)  
NOAA (National Oceanic and Atmospheric Administration)  
OECD (Organisation for Economic Co-operation and Development)  
Pakistan Government Payment Guarantees  
RAE - Greek Energy Regulator  
State Agency for Investment and National Projects of Ukraine  
US Department of Energy  
US Energy Information Administration (EIA)  
US Federal Energy Regulatory Commission (FERC)  
World Bank

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