New markets for the LNG Industry

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GIIGNL’s main objective is to study and promote the development of activities related to LNG: purchasing, importing, processing, transportation, handling, regasification and various uses of LNG.

GIIGNL members by zone and country (end of 2012)

<table>
<thead>
<tr>
<th>Zone</th>
<th>Countries</th>
<th>total</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMERICAS</td>
<td>Argentina (1), Canada (1), Chile (1), U.S.A. (7),</td>
<td>10</td>
</tr>
<tr>
<td>ASIA</td>
<td>China (2), India (3), Japan (21), Korea (3), Taïwan (1)</td>
<td>30</td>
</tr>
<tr>
<td>EUROPE</td>
<td>Austria (1), Belgium (2), France (4), Germany (1), Greece (1), Italy (3), Norway (1), Portugal (2), Spain (3), The Netherlands (4), Turkey (1), United Kingdom (7)</td>
<td>30</td>
</tr>
</tbody>
</table>

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Utilisation of liquefaction and regasification capacities

**Regasification capacity vs LNG imports in 2012**

- **Asia**: High regasification capacity with significant LNG imports.
- **Europe**, **Americas**, and **Middle East**: Lower regasification capacity compared to Asia.

**Worldwide liquefaction capacity vs LNG consumption in 2012**

- **Liquefaction capacity**: 282 mmt
- **Trade volumes**: 236.3 mmt

Equivalent to 84% use of the liquefaction capacity

**SOURCE: GIIGNL**
Spot, short-term & re-exports

Spot and Short-Term LNG Trade & Share of Total LNG Trade since 2000

- **Spot LNG trade (Mtpa)**
- **% of total LNG trade (right axis)**

*Note: Short-term trade denotes trades under contracts of a duration of 4 years or less.*

Re-exports received by receiving country (2012)

- Japan: 23%
- Argentina: 6%
- Brazil: 5%
- Spain: 7%
- India: 14%
- Korea: 17%
- Turkey: 3%
- Italy: 3%
- Other: 22%

Re-exports loaded by re-loading country (2012)

- Spain: 38%
- USA: 12%
- Belgium: 35%
- Portugal: 8%
Worldwide international gas trade – LNG vs gas pipe

Sources: GIIGNL, Cedigaz
LNG terminals in China (existing & planned)

Source: IEA
LNG terminals in India (existing & planned)

Source: PFC
Regasification terminals in LNG exporting countries incl. Indonesia, Malaysia, Egypt

Source: PFC
New LNG importers in emerging markets

South East Asia

Middle East & North Africa

Source PFC
FSRU projects

Source Höegh LNG
Europe 29 gas consumption
(including Switzerland & Turkey)

Source: Eurogas
Thank you all