



# Mapping the EU LNG Terminal Landscape

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**Gas Infrastructure Europe**

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# GIE – the European association for gas infrastructure operators



We represent the entire gas infrastructure business with  
**70 members in 26 European countries:**



GIE holds the  
secretariat for  
the LNG Protocol

# Meet our GLE members



16  
member  
companies

9  
countries

1  
observer

90%  
of the EU LNG  
import capacity



# GIE is committed to contributing to the EU Commission Paris Targets



**Paris Agreement COP21** - 195 countries agreed to limit global warming to well below 2C of 1990 temps

**Challenge** - net-zero carbon emissions by 2050

**Problem** – EU responsible for 10% global GHG emissions and energy responsible for 75% GHG emissions (and demand is growing)

**Solution** – decarbonised energy (gas and elec)



**PARIS2015**  
UN CLIMATE CHANGE CONFERENCE  
**COP21·CMP11**



**Affordable decarbonisation cannot be achieved without using gases and the gas infrastructure**

# I. LNG makes economic sense; key figures in international LNG sector

## DEMAND (2018)

**42 importing countries** (+2 vs. 2017)  
→ 29 in the EU

**868 MT regas capacity** (+18 vs. 2017)  
→ 20% is in the EU  
→ 10% are FSRUs (24 FSRUs)

**Biggest five consumers: MT, (% share):**

1. Japan: 82.5 (26%)
2. China: 54 (17%)
3. South Korea: 44 (14%)
4. India: 22 (7%)
5. Taiwan: 17 (5%)



## SUPPLY (2018)

**20 importing countries** (+1 vs. 2017)

**406 MT liquefaction capacity** (+41 vs. 2017)

**Biggest five producers: MT, (% share):**

1. Qatar: 77 (25%)
2. Australia: 67 (21%)
3. Malaysia: 25 (8%)
4. USA: 21 (7%)
5. Nigeria: 20 (7%)

## 2. No issues around capacity

Number of LNG import terminals by type

|                  | operational | under construction<br>(excl. expansions) | planned   |
|------------------|-------------|--|-----------|
| Large-scale      | 29          | 3  | 17        |
| FSRUs and others | 7           | 1  | 10        |
| Small-scale      | 7           | 3  | 4         |
| <b>Total</b>     | <b>36</b>   | <b>6</b>                                 | <b>21</b> |

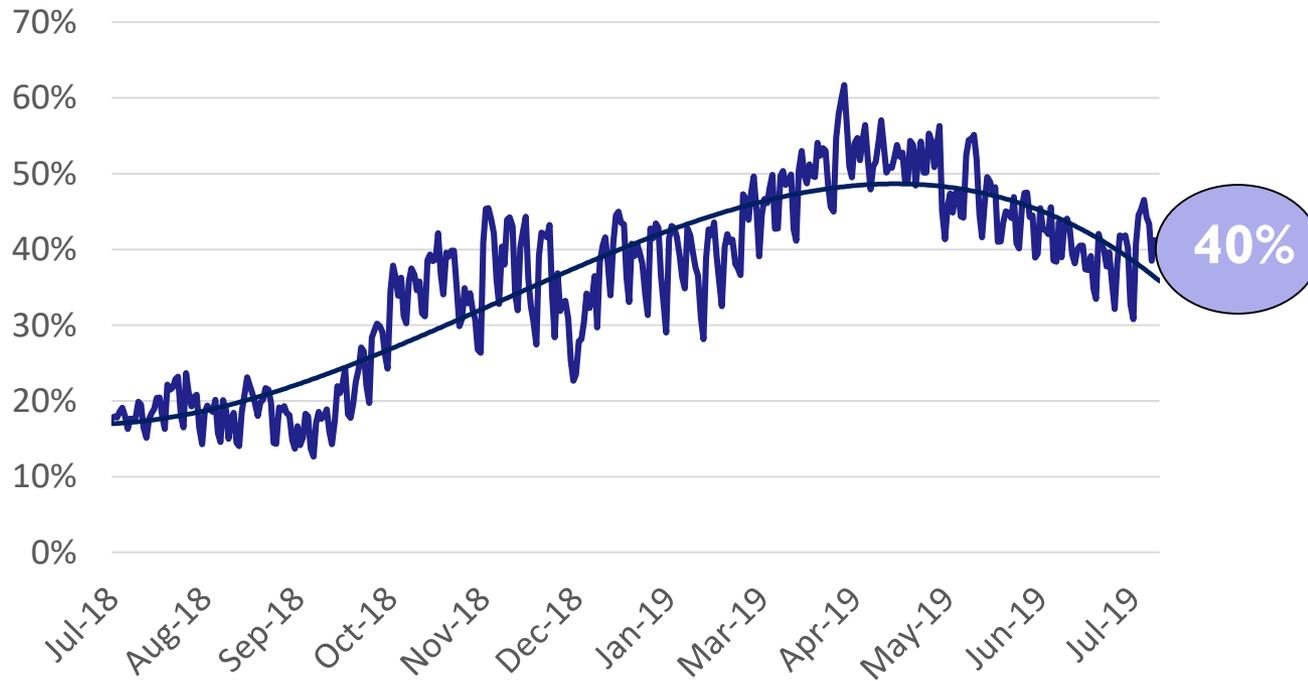
Annual regasification capacity of LNG import terminals (billion m<sup>3</sup>(N)/year)

|                    | EU 28 | Europe |
|--------------------|-------|--------|
| operational        | 212   | 241    |
| under construction | 9     | 9      |
| planned            | 108   | 140    |



## 2. No issues around capacity

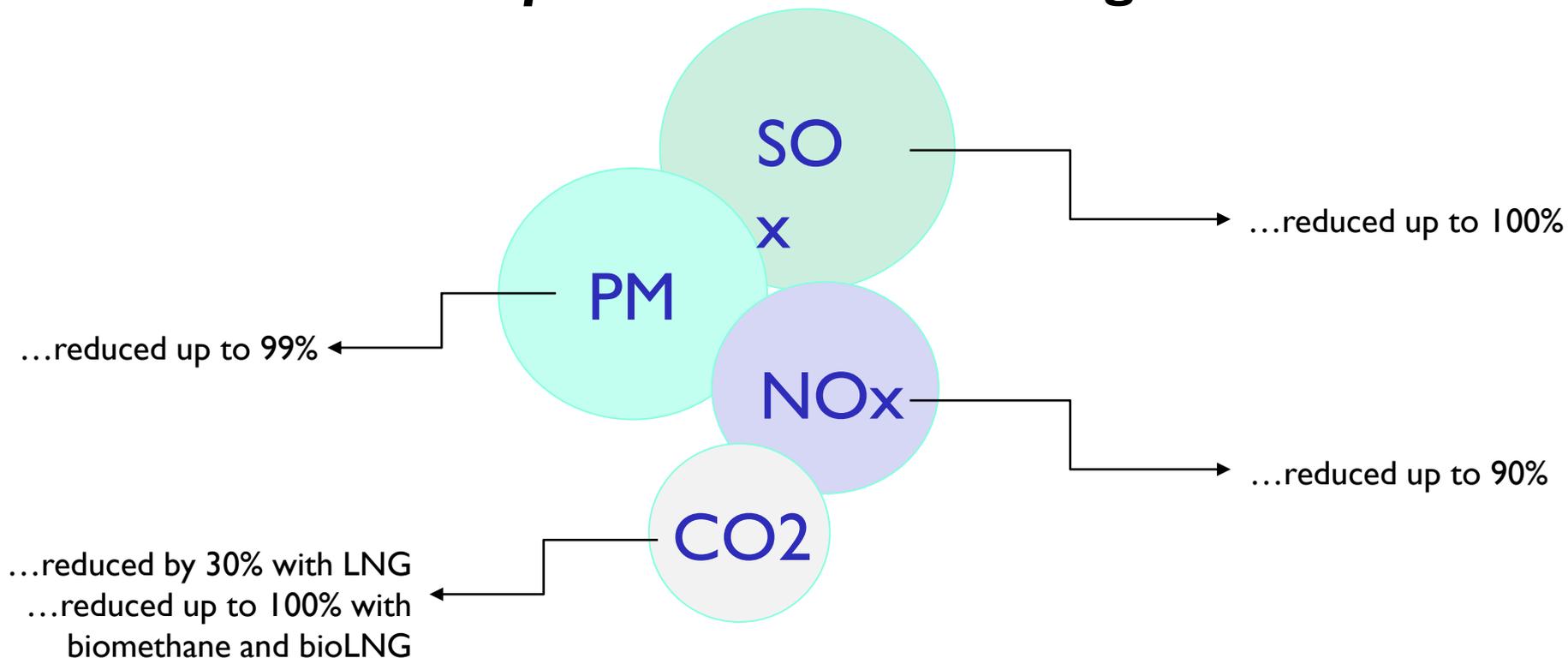
### Terminals are well-utilised Utilisation Rate EU



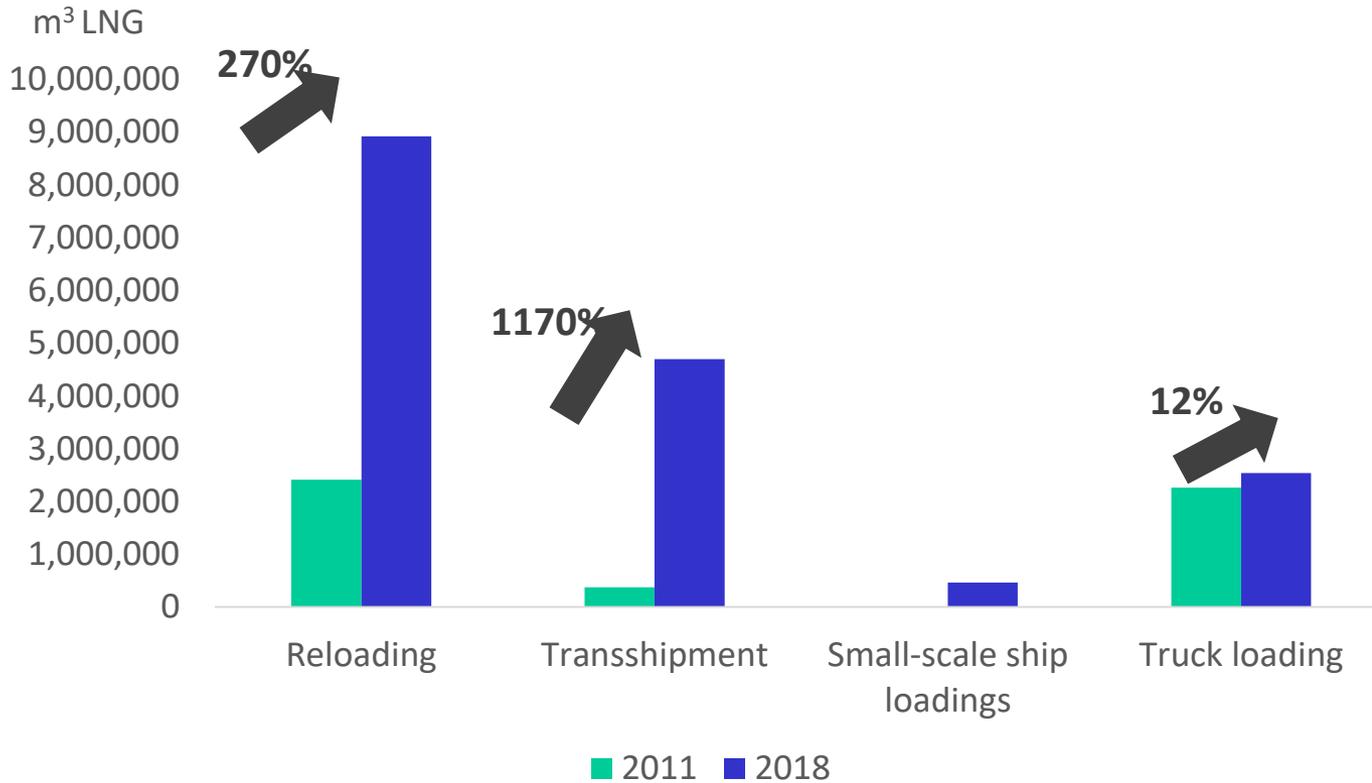
### 3. Greta should like LNG...



**... as it helps achieve the Paris Agreement**



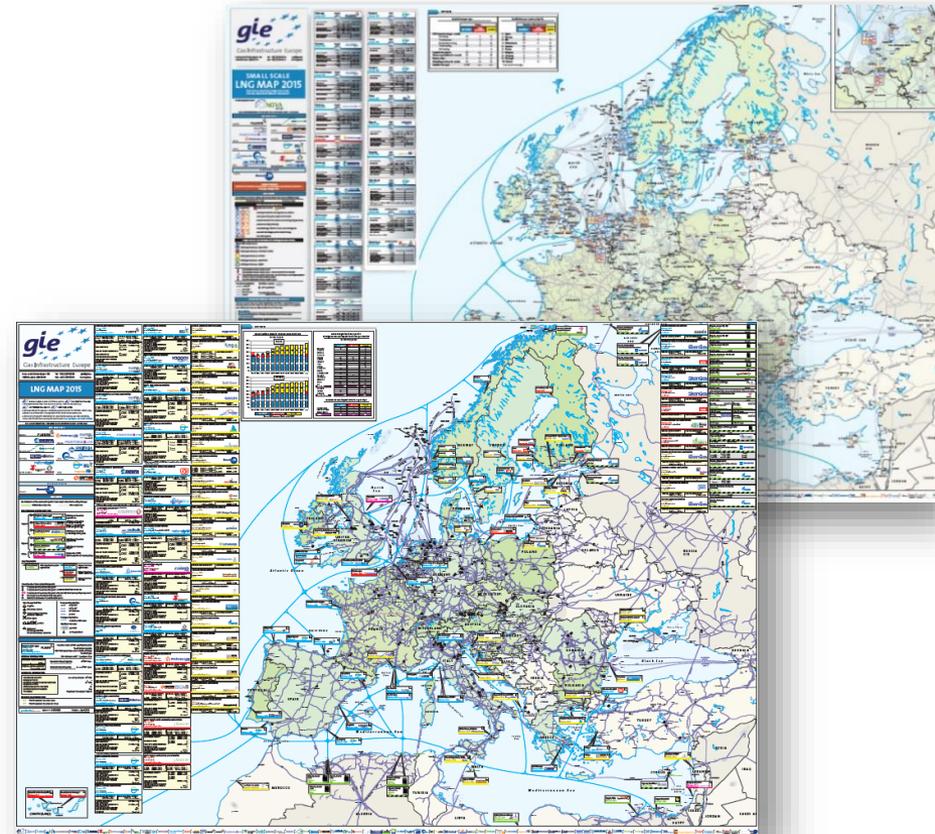
## 4. New services for market needs



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- **Large Scale LNG map and database**  
(print version available at [www.gie.eu](http://www.gie.eu))
- **Small Scale LNG map and database**  
(map available in October 2018)
- **LNG Investment database**
- **LNG New Services Inventory**
- **LNG List of Services**

All information can be found at [www.gie.eu](http://www.gie.eu)



## 5. EU Commission looking into it

New regulatory  
framework for LNG  
terminals in Europe?





**gie**

**Keep it cool...with LNG**  
**#WeDeliverParis**



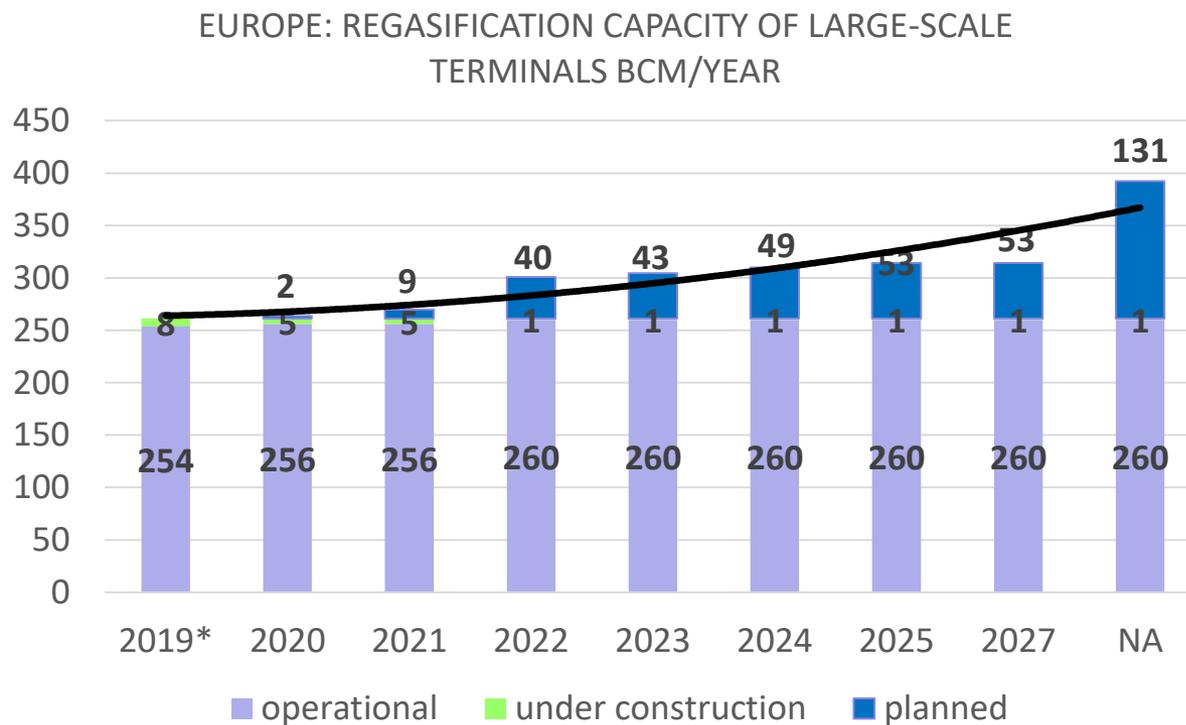
**gas**  
**naturally**  
making a clean future real

**Gas Naturally**

*GN is a campaign to showcase the essential role of natural gas in the forthcoming energy revolution. The mitigation of climate change has become one of the most important issues for the gas industry.*



## 2. No issues around capacity



Source: GLE Investment database 2019-2027

## 2. No issues around capacity

### Utilisation rate per country

