



Mapping the EU LNG Terminal Landscape

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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%)

Global trade:
+9% vs. 2017

2. No issues around capacity

Number of LNG import terminals by type

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

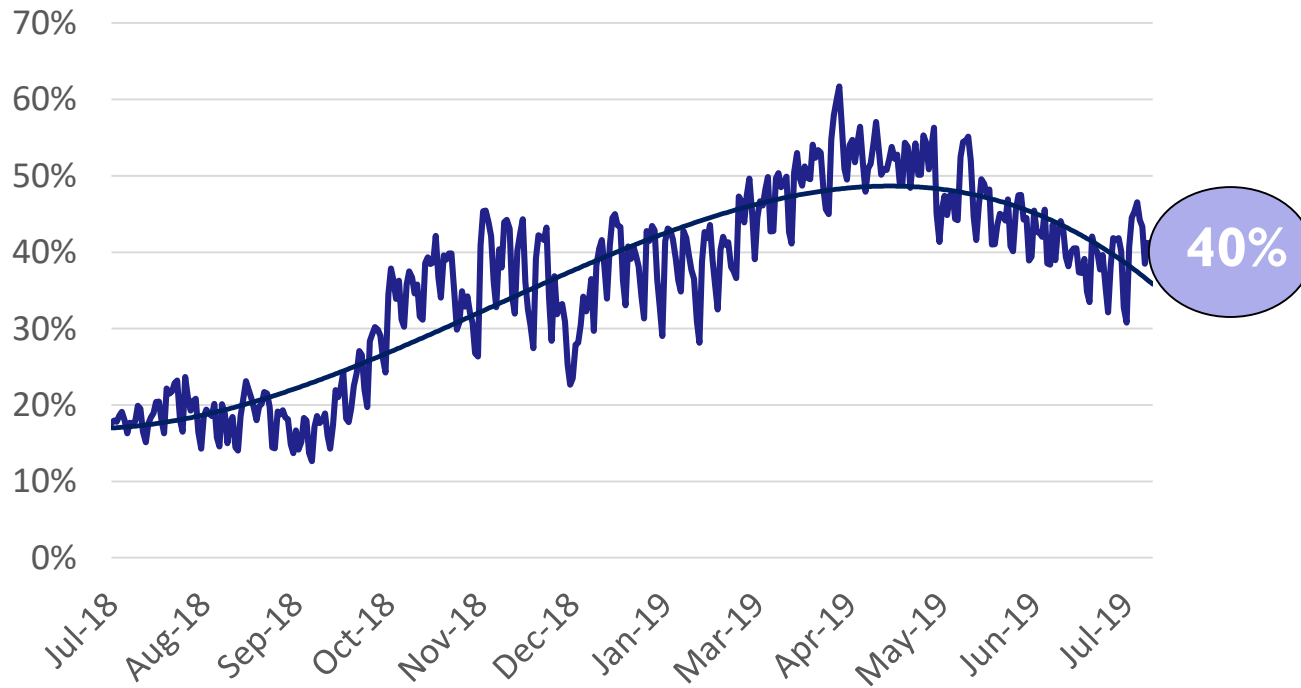
Annual regasification capacity of LNG import terminals (billion m³(N)/year)

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



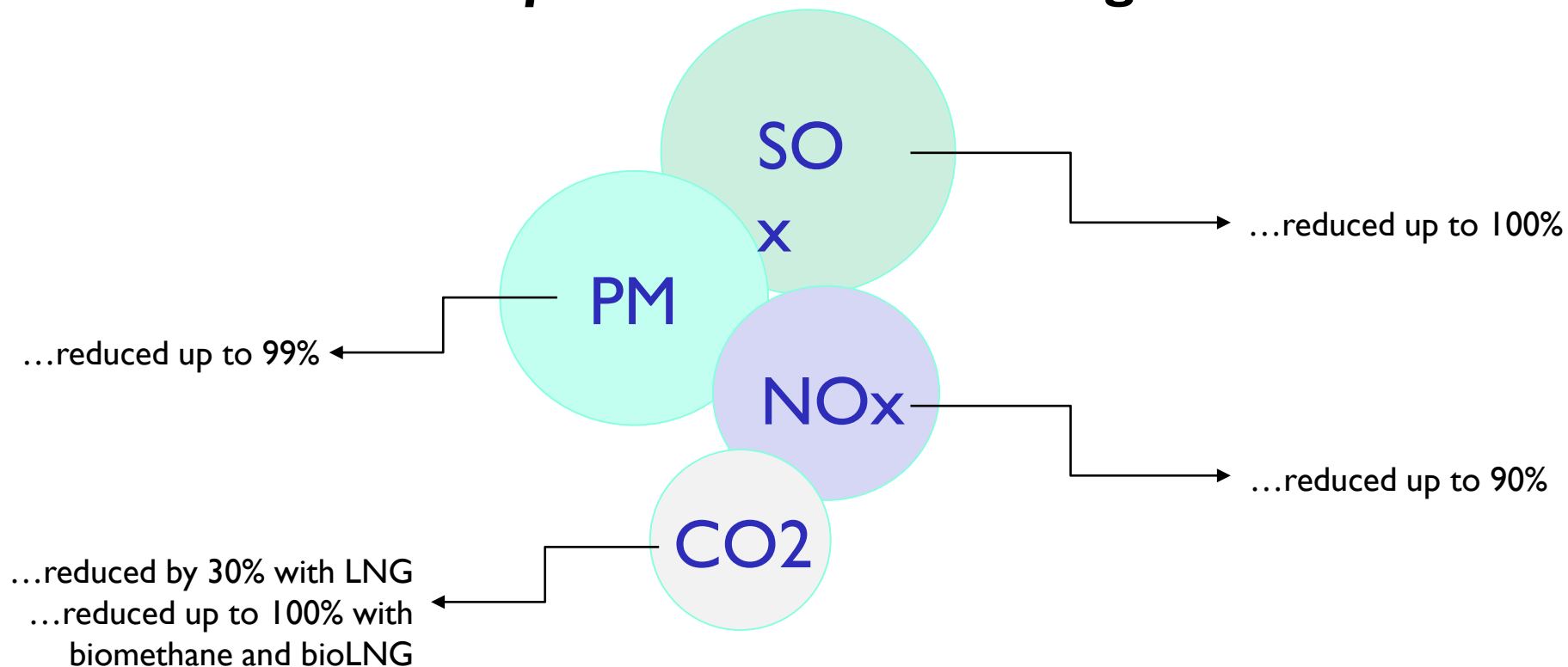
2. No issues around capacity

Terminals are well-utilised Utilisation Rate EU

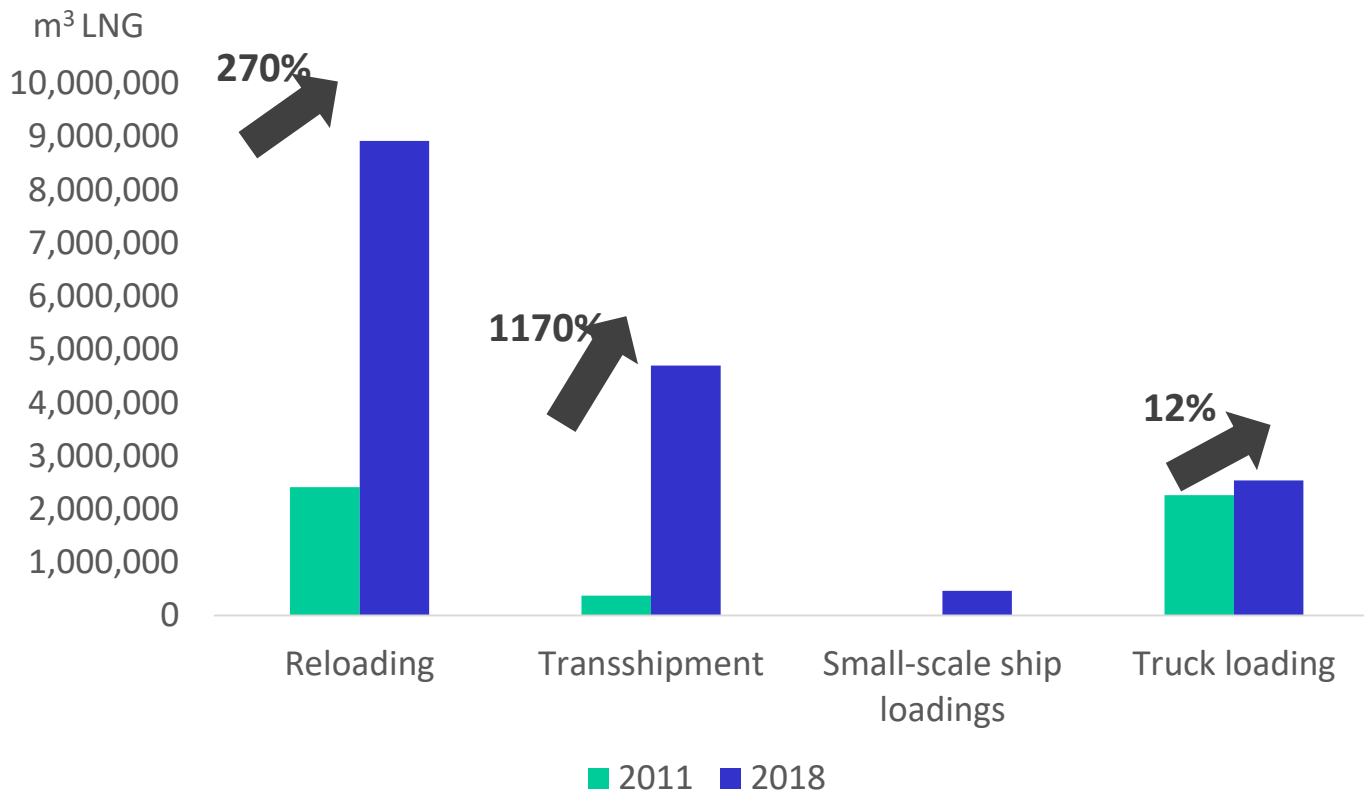


3. Greta should like LNG...

... as it helps achieve the Paris Agreement



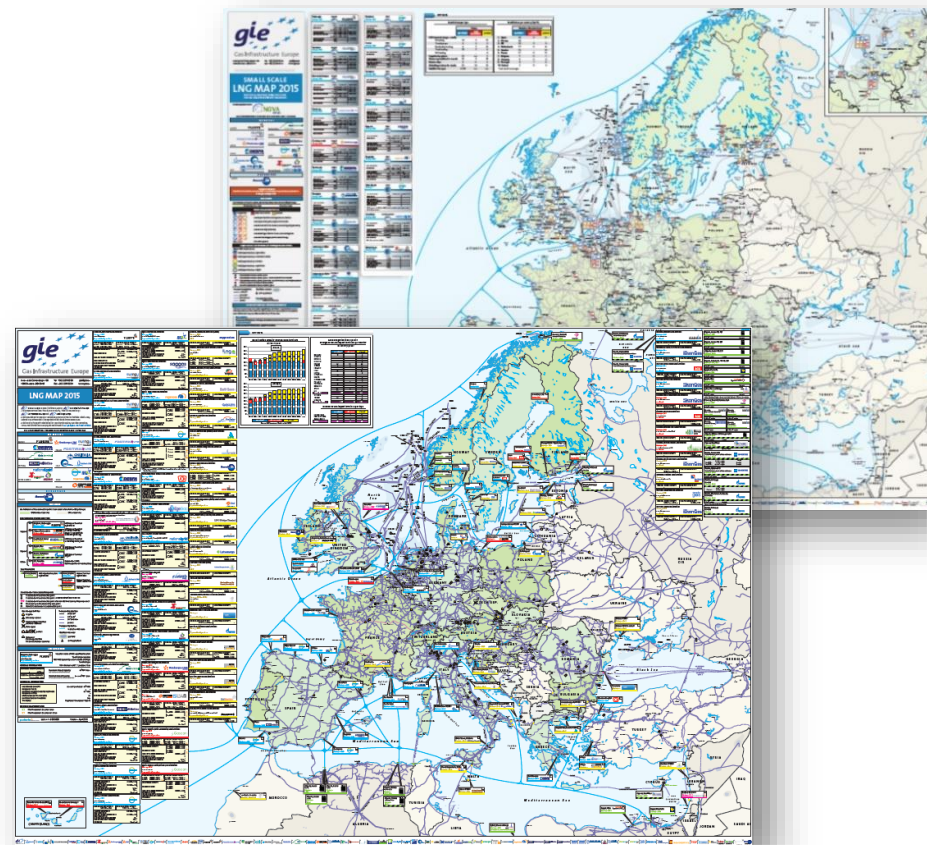
4. New services for market needs



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- **Large Scale LNG map and database**
(print version available at www.gie.eu)
- **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



5. *EU Commission looking into it*

New regulatory
framework for LNG
terminals in Europe?





Keep it cool...with LNG
#WeDeliverParis

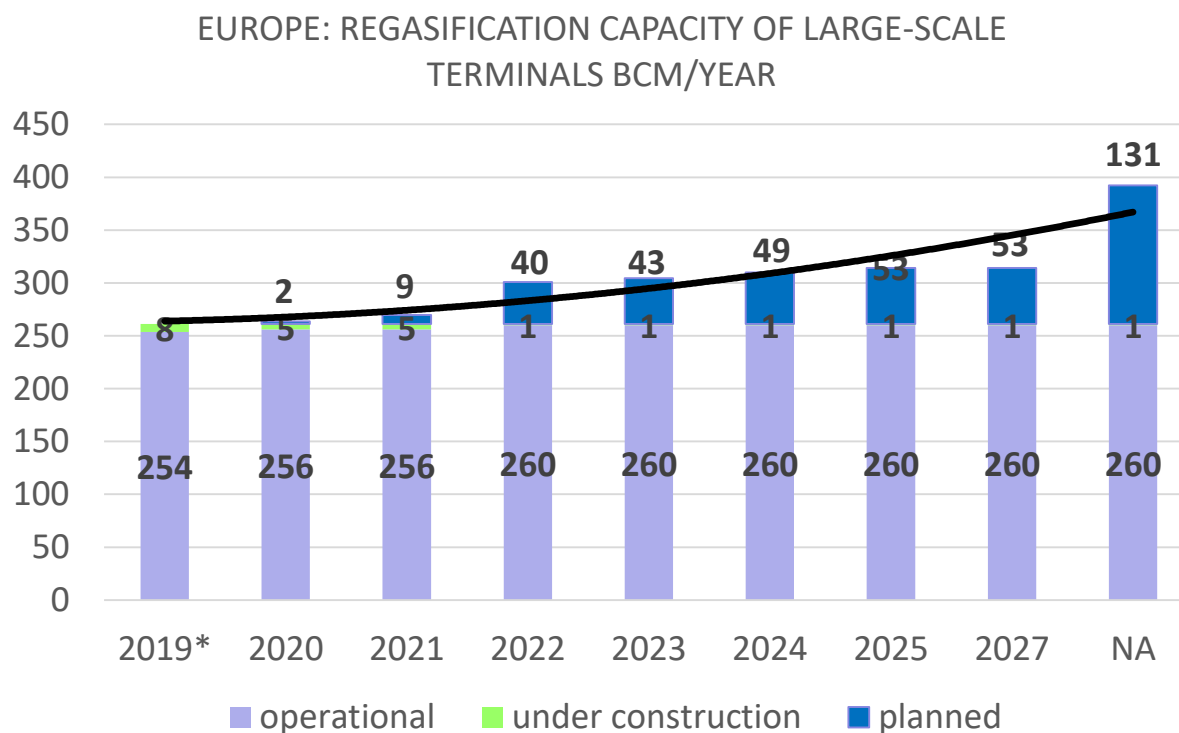


Gas Naturally

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

