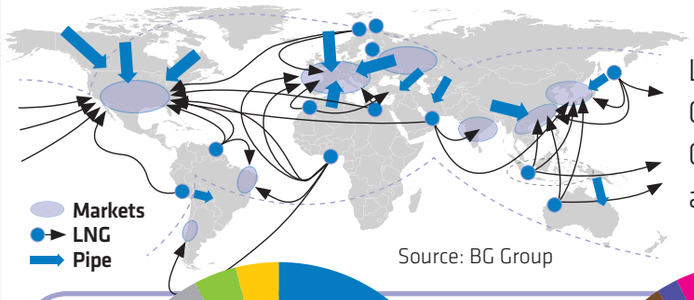
SMALL-MID SCALE LNG SUMMIT 2014

THE GLOBAL SMALL-MID SCALE LNG STORY 2014

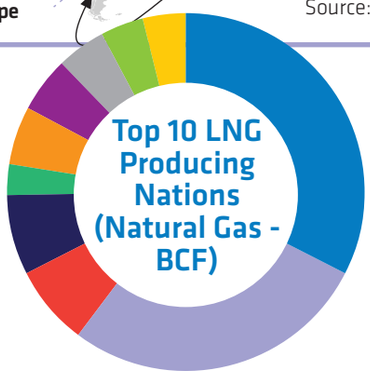
Liquefied natural gas (LNG) is natural gas (predominantly methane) that has been converted to liquid form for ease of storage and transport. Liquefied natural gas takes up about **1/600th** the volume of natural gas in the gaseous state. It is odourless, colourless, non-toxic and non-corrosive.



Source: BG Group

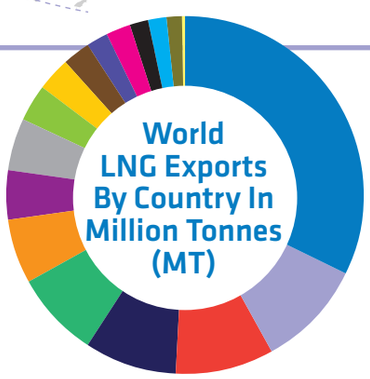
LNG trade has increased by **36%** over the past **5 years**
Global LNG trade was **237.7 MT** in **2012**
Global liquefaction capacity stood at **280.9 MTPA** at the end of **2012**

Top 10 LNG Producing Nations (Natural Gas - BCF)



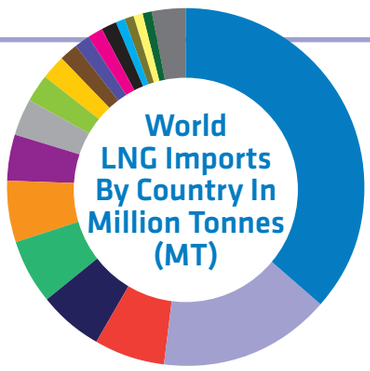
United States	25308	Norway	4155
Russia	21685	China	3811
Iran	5649	Saudi Arabia	3585
Qatar	5523	Algeria	3053
Canada	5070	Netherlands	2840

World LNG Exports By Country In Million Tonnes (MT)



Qatar	77.4	Brunei	6.8
Malaysia	23.1	UAE	5.6
Australia	20.8	Egypt	5.1
Nigeria	20	Yemen	5.1
Indonesia	18.1	Peru	3.9
Trinidad	14.4	Eq. Guinea	3.8
Algeria	11	Norway	3.4
Russia	10.9	US	0.2
Oman	8.1		

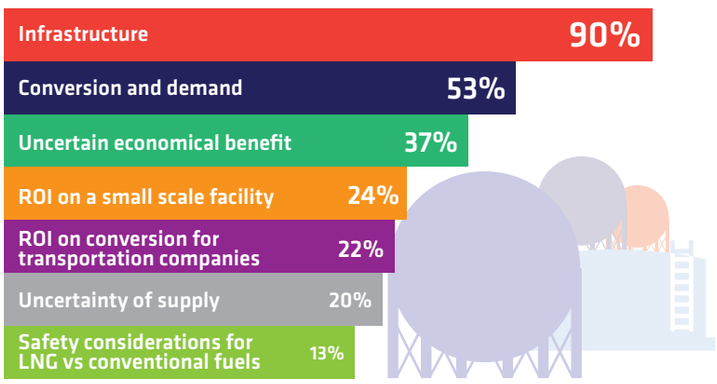
World LNG Imports By Country In Million Tonnes (MT)



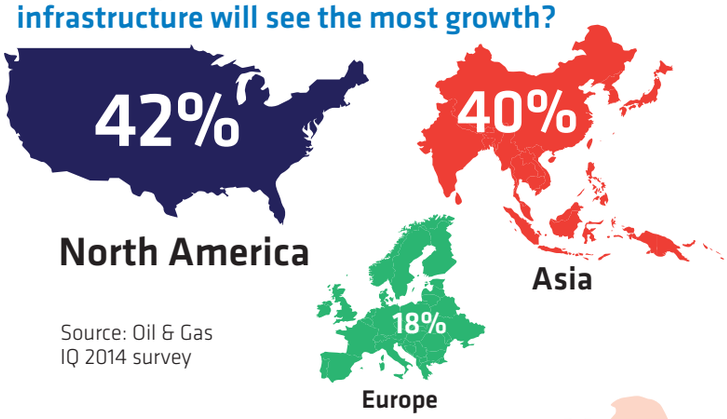
Japan	87.3	Argentina	3.8
South Korea	36.8	Mexico	3.6
China	14.8	US	3.3
Spain	14.2	Chile	3
India	14	Brazil	2.5
Taiwan	12.8	Kuwait	2.1
UK	10.5	Belguim	1.9
France	7.5	Portugal	1.7
Turkey	5.7	Other	7.1
Italy	5.2		

Source: IGU World LNG Report – 2013

What do you feel are the greatest challenges to LNG as a fuel going forward?



Where do you feel small scale LNG infrastructure will see the most growth?



Source: Oil & Gas IQ 2014 survey

FOCUS North America

The shale revolution in North America has lead to a glut of natural gas with a mooted **190 MPTA** of new liquefaction proposals in the pipeline.

As of **May 2013**, there were **26** new liquefaction projects proposed across the US Lower 48 and Canada

There are currently **145** LNG refuelling stations either extant or in planning in the USA

FOCUS Asia

Southeast Asian gas demand for power generation and industrial use is projected to reach **8.83 TCF by 2035**

China has more than **210 TCF** of technically recoverable gas reserves producing approximately **3 TCF** of gas a year

Currently **about 7%** of total gas produced in China, is turned into LNG and used to fuel **heavy load vehicles, buses** and **river fleets**

There were **50,000** LNG-fuelled trucks in China in 2012

This infographic was produced in consultation with our LNG database for the **Small-Mid Scale LNG Summit** which will be taking place from **28 - 30 April, 2014** at the **Hilton Amsterdam, The Netherlands**. To meet the likes of Shell, Gasnor and GDF Suez, contact us on **0800 652 2363** or **+44 (0) 20 7368 9300** or email **enquire@iqpc.co.uk** now.

Oil & Gas iQ