XII REGIONAL ENERGY INTEGRATION FORUM - FIER
Session 3 – The role of LNG and non-conventional hydrocarbons in the energy integration in Latin America and the Caribbean

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Global LNG Trade

Shortest LNG voyage length in 2016:
130 nm (Algeria to Spain)

Average LNG voyage length in 2016:
7,640 nm

Longest LNG voyage length in 2016:
12,280 nm (Norway to China)

LNG Markets:
- Importer
- Exporter
- Both
- Both (Re-exporters)

LNG Flow (MT):
- 0.5 - 5
- 5.1 - 10
- >10

Australia → China
+6.9 MMt (+121% YOY)

Nigeria → Japan
-2.7 MMt (-59% YOY)

Note: Route start and end points are not always indicative of project location.
Global LNG trade reached a record of 258.0 MT in 2016, rising above the previous 244.8 MT set last year.

China, India, and Egypt provided 15.7 MT in new import demand.

Contractions were largest in Brazil, the UK, and Japan (combined -8.8 MT).
LNG Exports and Market Share by Country (MPTA)

Note: Numbers in the legend represent total 2016 exports in MT, followed by market share.
Source: IHS Markit, IGU
Re-Exported LNG

4.4 MT
Re-exported LNG volumes in 2016
LNG Imports and Market Share by Country (in MTPA)

Note: Number legend represents total imports in MT, followed by market share %
“Other” includes countries with imports less than 2.5 MT (by order of size): Singapore, US, Portugal, Puerto Rico, Belgium, Malaysia, Brazil, Lithuania, Poland, Dominican Republic, Greece, Netherlands, Israel, Canada, Jamaica, and Colombia.
Sources: IHS Markit, IGU
LNG Exporters & Importers

+2
Number of new LNG importers in 2016

Two new countries began importing LNG in 2016, Colombia and Jamaica, although volumes were less than 0.2 MT.

Exports resumed from Angola and Egypt. Yemen recorded no exports for the year, after production was shut in during the first half of 2015.
Global Liquefaction Capacity

Capacity Additions

+31.7 MTPA

Year-over-year growth of global liquefaction capacity in 2016

Global liquefaction capacity increased from 304.4 MTPA in 2015 to 336.1 MTPA in 2016.

114.6 MTPA was under construction as of January 2017.

879 MTPA of new liquefaction projects have been proposed as of January 2017, primarily in North America.
Global Liquefaction Capacity

114.6 MTPA
Global liquefaction capacity under construction,
January 2017
Nominal Liquefaction Capacity by Country in 2016 and 2022

Note: Liquefaction capacity only takes into account existing and under construction projects expected online by 2022.
Sources: IHS, IGU, Company Announcements
Capex US$/ TON of LNG capacity
Natural Gas Price Outlook

Source: GECF Secretariat based on data from GECF GGM
THANK YOU

Ministry of Energy and Energy Industries

Timmy Baksh
tbaksh@energy.gov.tt
Tel: +1 868 678 7653