The changing LNG Demand and Supply Outlook

Jérôme Ferrier
President IGU
China leads the gas demand growth to 2020

Source: IEA
Natural gas demand in Asia-Pacific 1990-2016

Source: IEA
Americas and Australia are the largest contributors to global gas incremental supply *BP (2013)*
Export tight LNG supply until 2020

Source: IEA
Pipeline and LNG trade in Asia-Pacific 2000-2017

Source: IEA
LNG market has tightened

Source: BG Group
Break-even Destination Market Prices for US LNG to Europe and Asia

Source: Henderson (2013) and OIES
Liquefaction Unit Cost of Construction 1969-2015

Source: Oxford Institute for Energy Studies (OIES)
Regional Contract Pricing Prevailing Structure

Source: Poten & Partners Inc New York
Market based pricing of gas in three main consuming regions

Source: IGU
Structural ongoing Changes in Gas Pricing in Asia

Source: OIES