



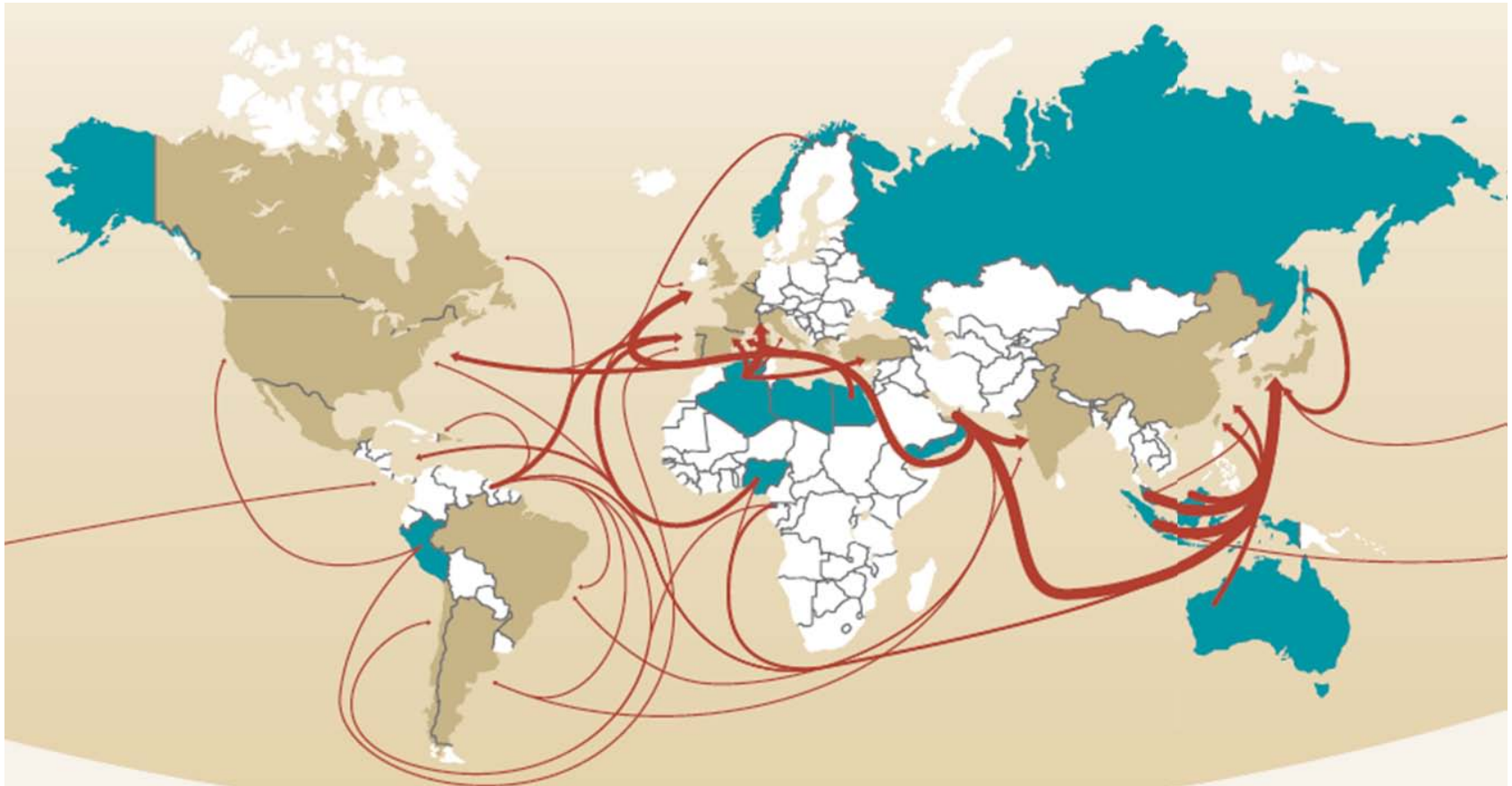
Gas LNG Europe

LNG TERMINALS

KEY PLAYERS IN THE GAS MARKET

Wim Groenendijk, GLE Vice President

LNG makes worldwide gas reserves accessible to Europe

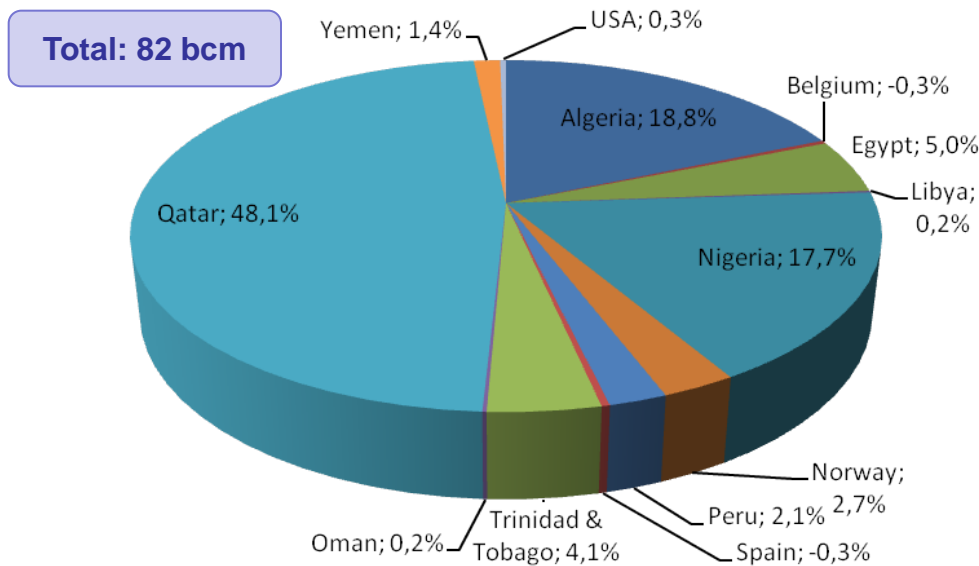


SOURCE: GIIGNL

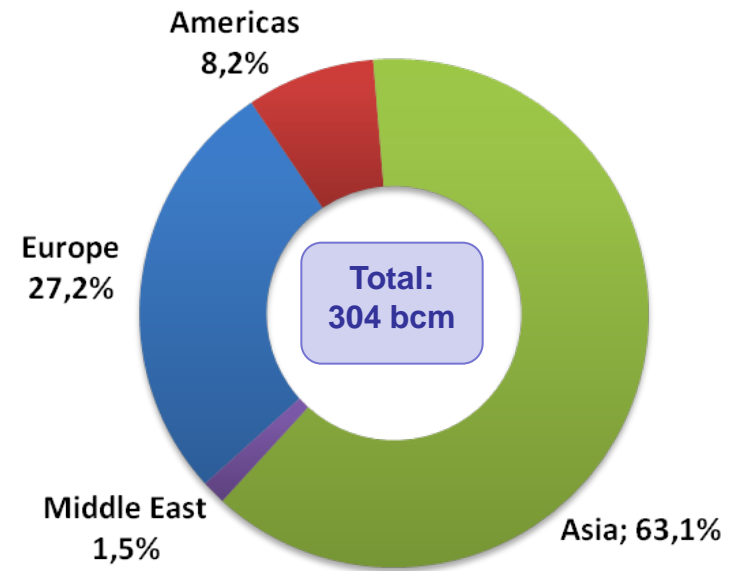
 IMPORTING COUNTRIES
 EXPORTING COUNTRIES

LNG contributes to Security of Supply, diversification of sources and competition

LNG IMPORTS INTO EUROPE PER EXPORTING COUNTRY (2011)

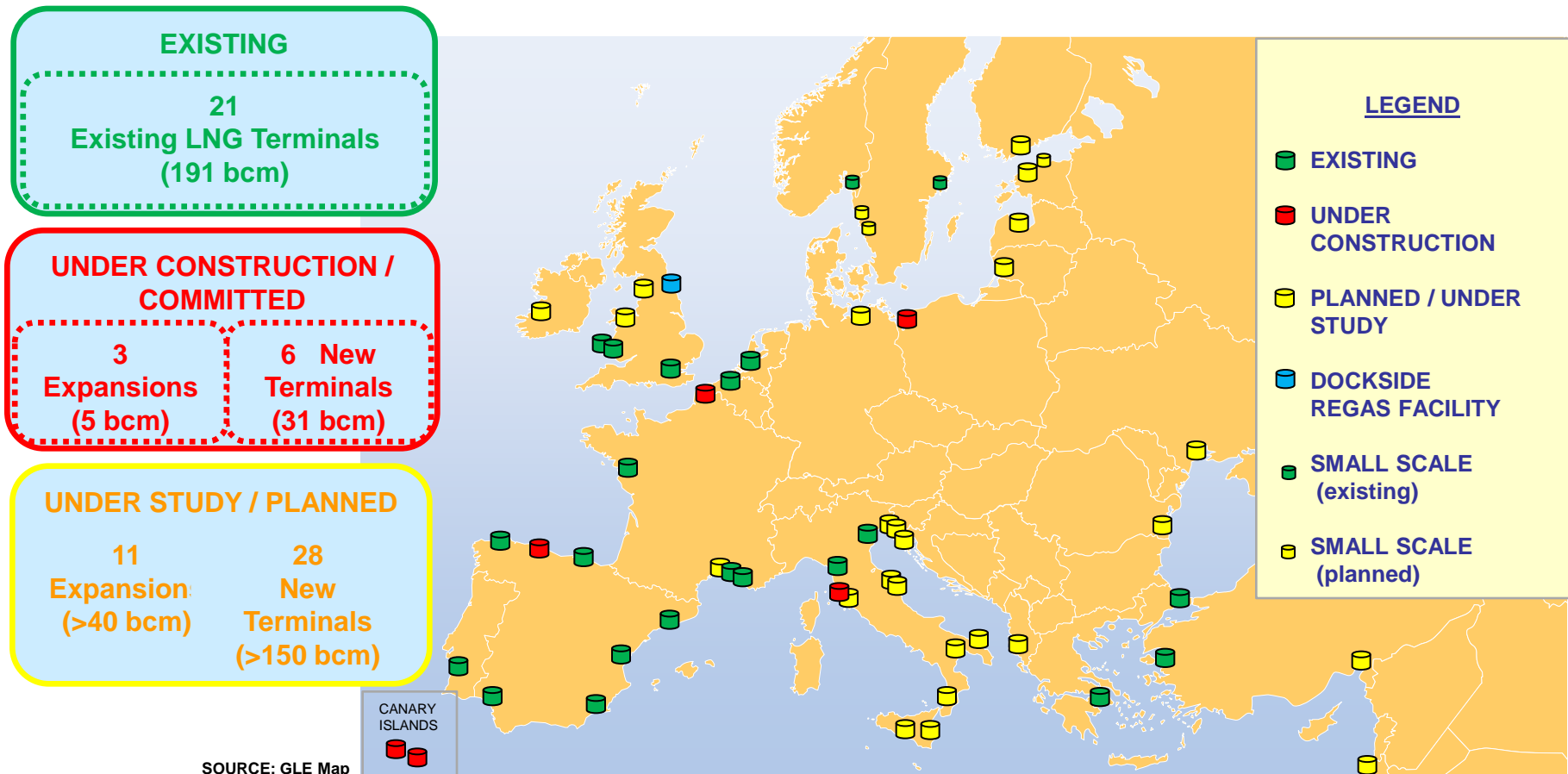


SHARE OF LNG WORLD IMPORTS (2011)



SOURCE: GIIGNL THE LNG INDUSTRY 2011
[Europe includes EU-27 + Turkey]
*SPAIN and BELGIUM: Re-Exports

LNG Terminals operate all around Europe

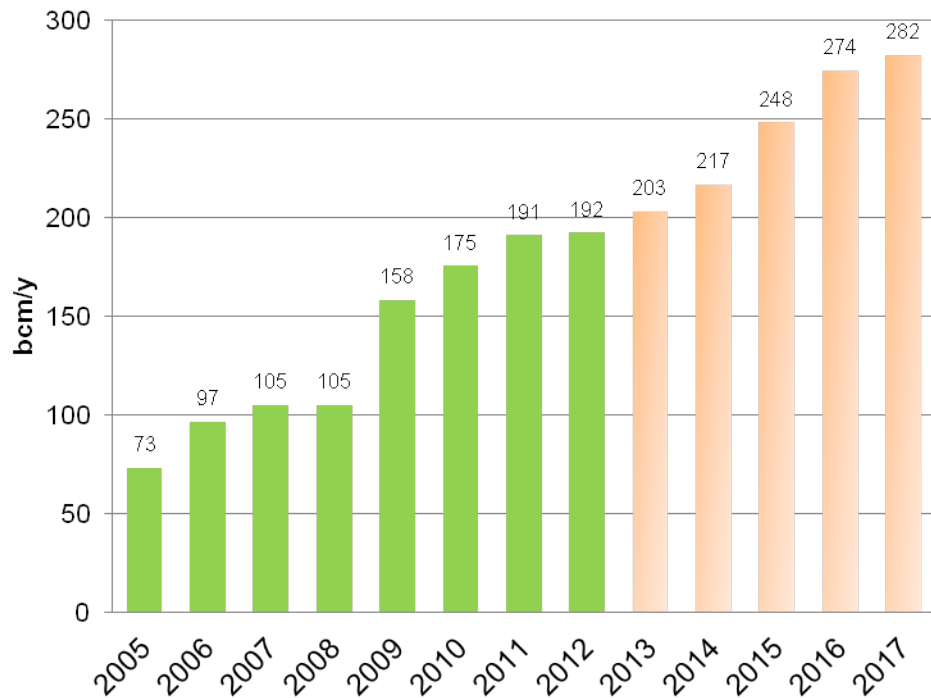


Detailed information on LNG Projects is available at: http://www.gie.eu/maps_data/index.asp

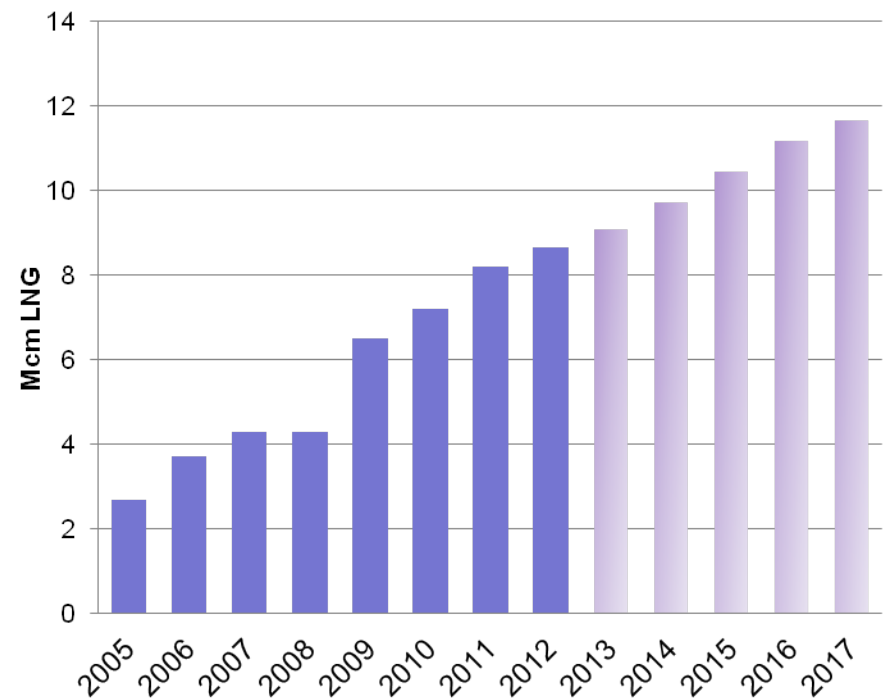
LNG TERMINALS IN EUROPE EVOLUTION OF CAPACITY



REGASIFICATION CAPACITY IN EUROPE

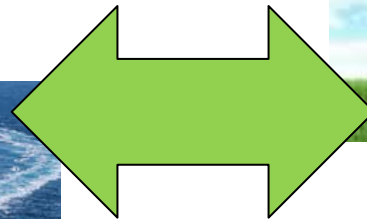


LNG TERMINALS' STORAGE CAPACITY IN EUROPE



Source: GLE MAP & GLE INVESTMENT DATABASE

LNG provides a high level of flexibility, making it the
ideal partner for renewables



The use of LNG as a fuel offers an excellent opportunity for improving the environmental footprint in the transport sector

Less SO_x, NO_x, CO₂ and particle emissions compared to other fossil fuels



Present and under study ECA zones
Source: IMO/DNV

Some examples of proven LNG applications



LNG powered offshore supply vessel, Norway



LNG powered vessel design (source: DNV)



Locomotive converted to LNG, US



LNG trailer 50 m³, China



LNG bus, Poland



LNG truck, Netherlands



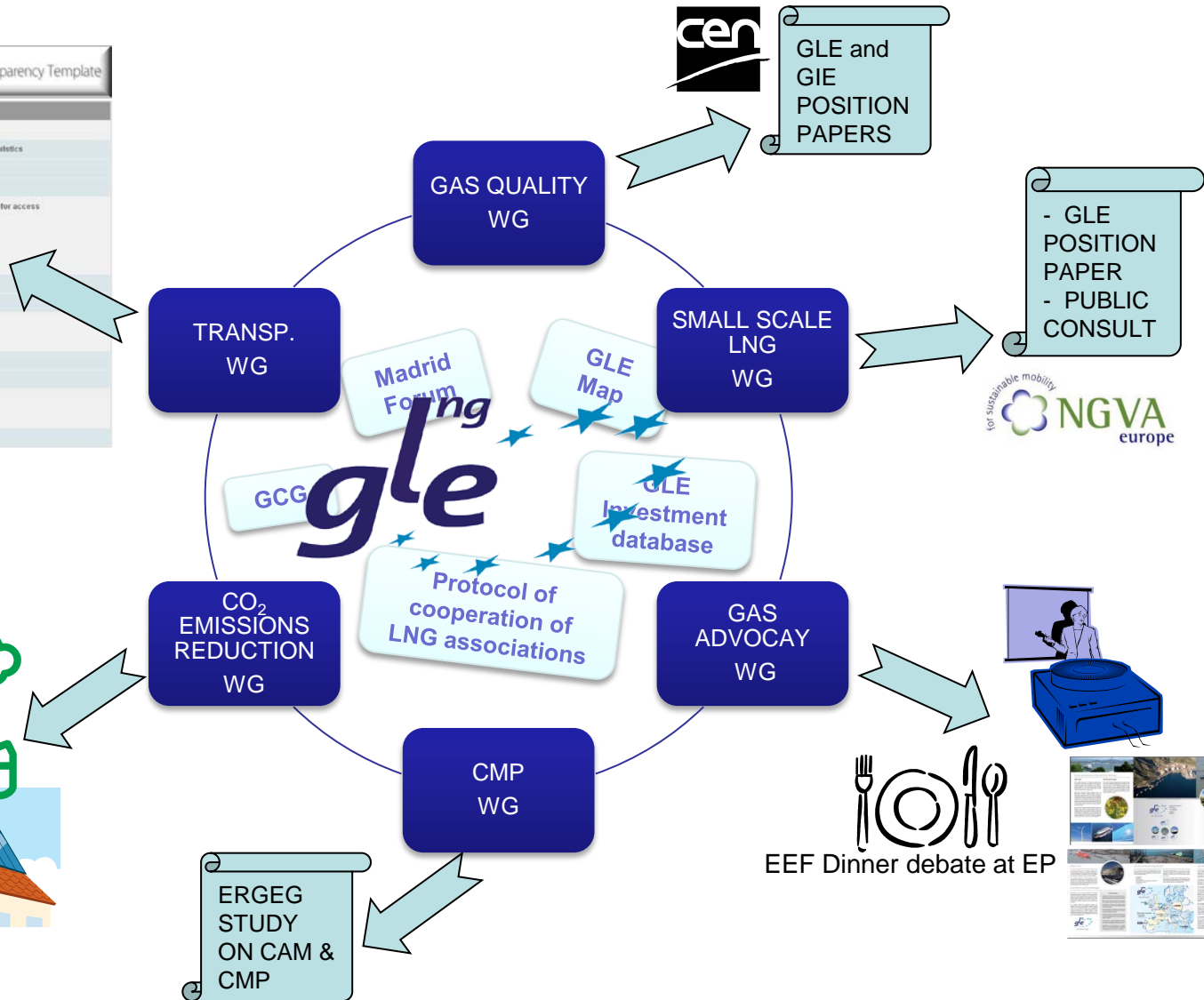
NG and LNG station, US

Source: IGU/NGVA Europe/DNV

GLE's MAIN ACTIVITIES



gle LNG Terminals Transparency Template	
Macro Area	Submenu
1 CONTACT	Contact
2 TERMINAL CHARACTERISTICS	Facilities main characteristics Service Description LNG Quality
3 HOW TO BECOME A CUSTOMER / USER	Main steps for applying for access Contract information TSD information Ship procedures
4 CAPACITIES	Primary market Secondary market
5 TARIFF	Regulated terminals Exempted terminals
6 LEGAL DOCUMENTATION	Contracts/Codes Regulations/Legislation
7 OPERATIONAL DATA	Historical data Operational data
8 MISCELLANEOUS	Projects



CONCLUSION



- **LNG contributes to Security of Supply, diversification of sources and routes and competition**
- **LNG plays different roles in different countries**
- **LNG provides high level of flexibility contributing to renewables integration**
- **LNG will be key in meeting strict environmental requirements for the heavy transport sector**
- **GLE is continuously working to enhance LSOs' transparency**
- **LNG volumes to the EU are increasing. To maintain the development of LNG infrastructure a sound investment climate and regulatory stability are required**



**Thank you
for your attention!**