



Gas Infrastructure Europe

European LNG terminals: Status and outlook

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GLE Vice-President**

**Conference on LNG for Transport, Italy and the
Mediterranean Area, Rome, 11 June 2015**

- GLE (Gas LNG Europe) is one of the three columns of GIE (Gas Infrastructure Europe)



- GLE membership:
 - 17 member companies
 - 9 countries
 - 1 observer

↙ **GLE represents 93% of regasification capacity in the EU**

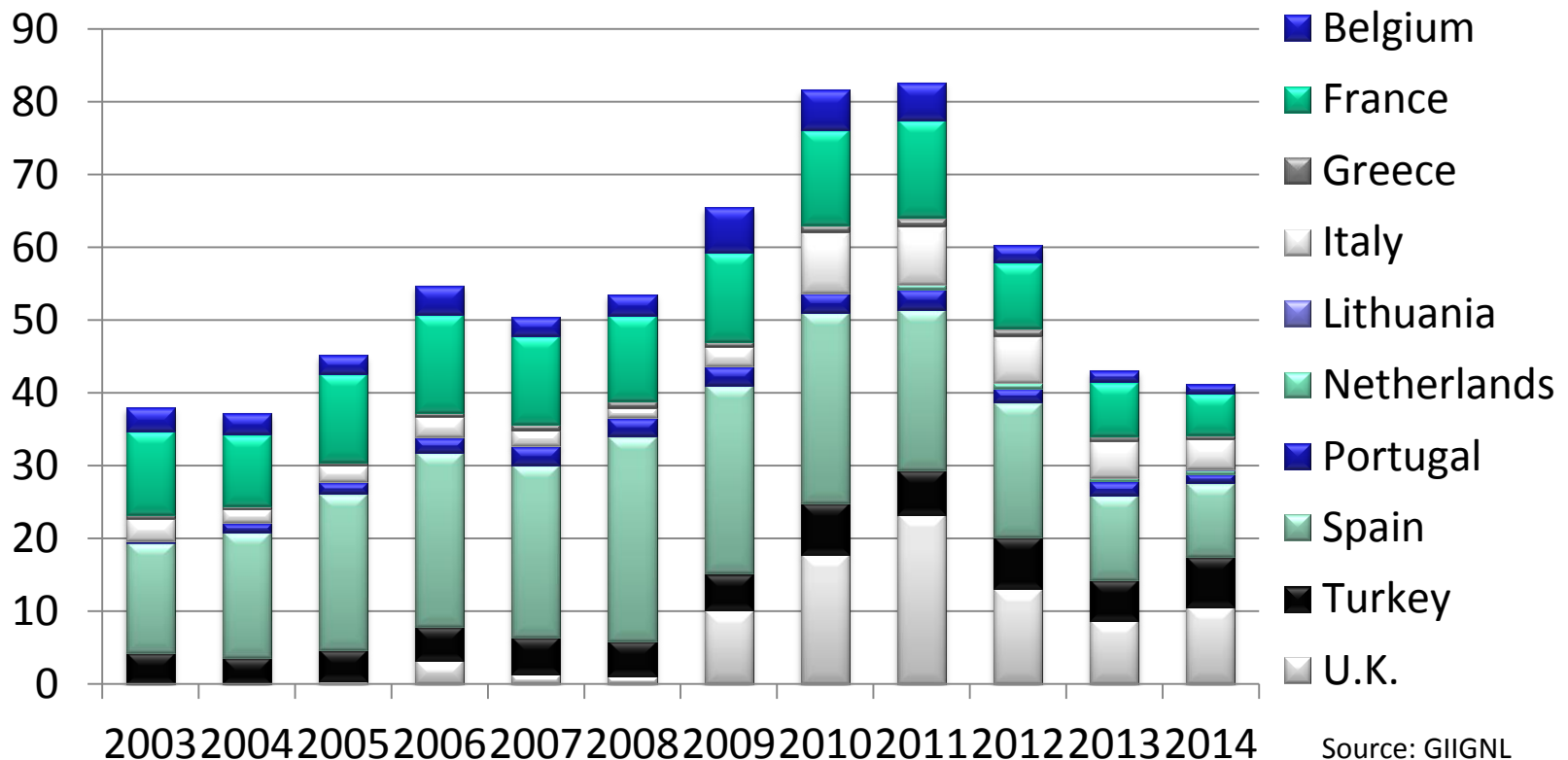




Strong decline of LNG imports to Europe stopped

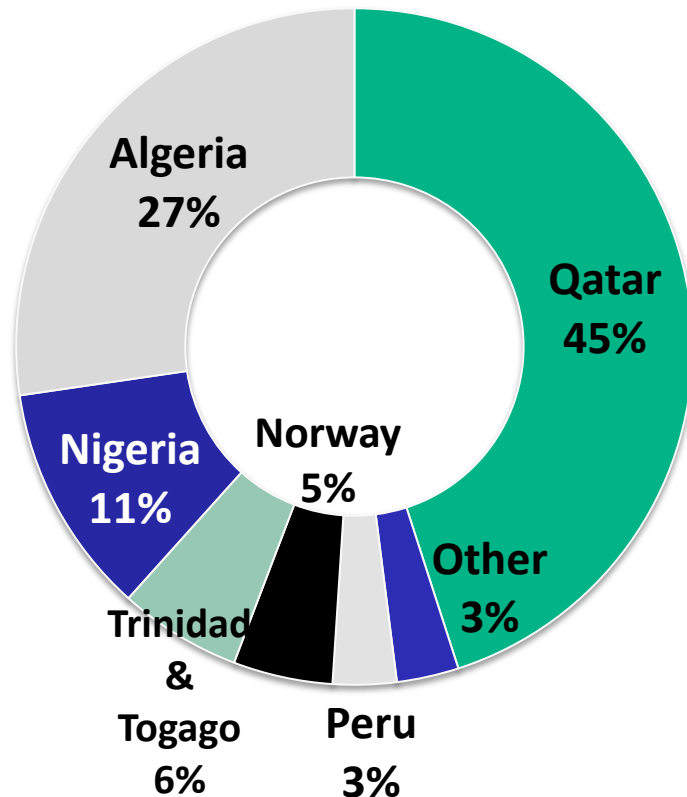
The overall downward trend for LNG imports in Europe has halted in the second half of 2014

LNG imports (billion m³(N)/year)

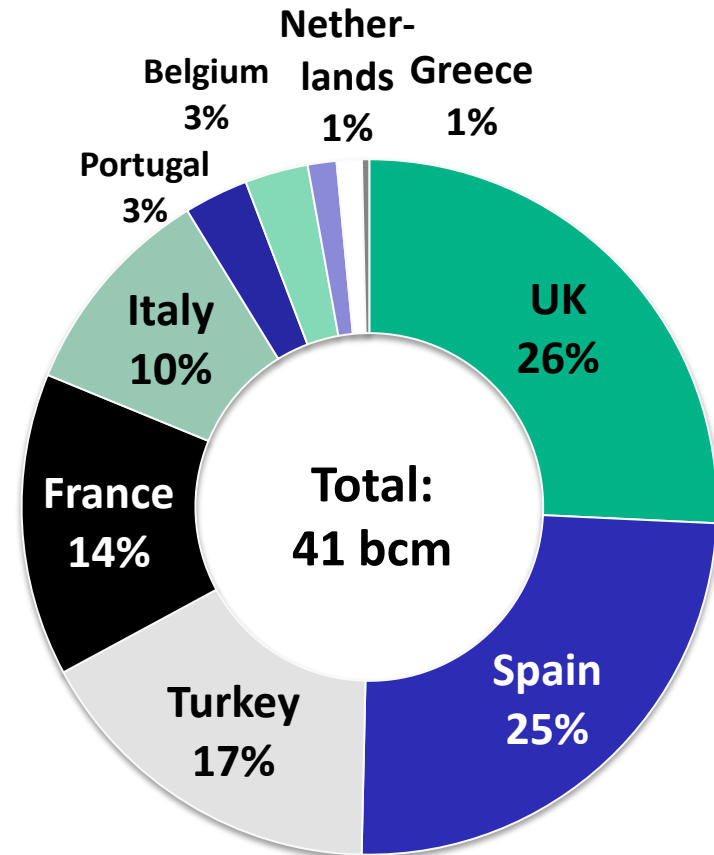


Source: GIIGNL

Source of LNG imports (excl. re-exports)



LNG import countries



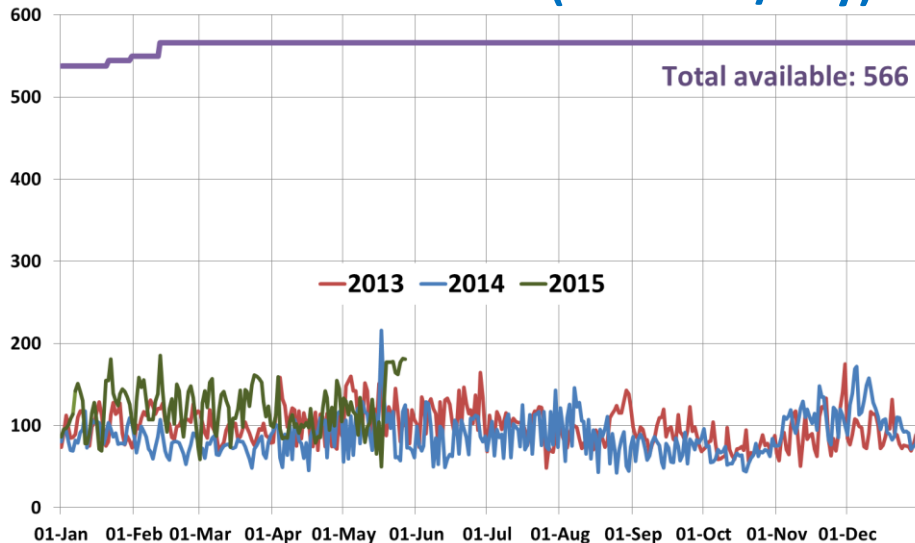
Source: GIIGNL



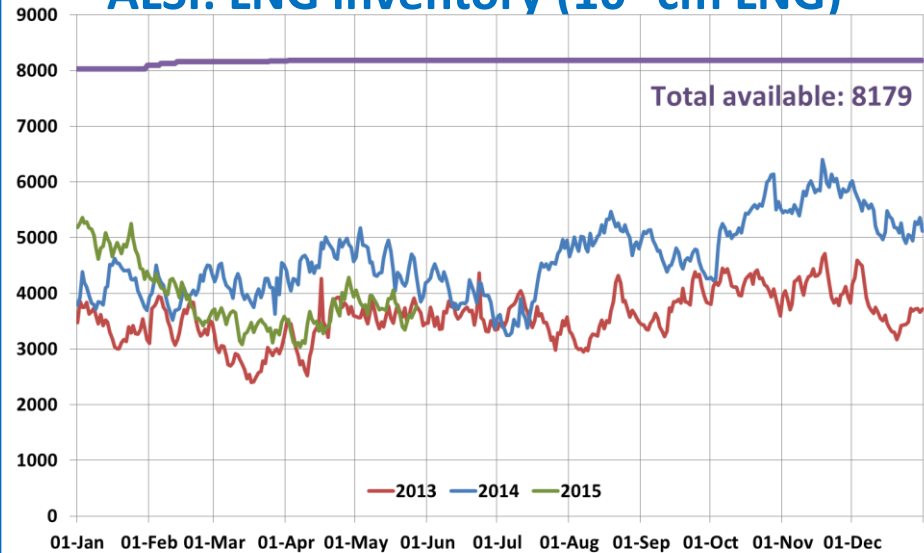
Utilization of EU LNG terminals

- Total send out capacity of large-scale LNG terminals: 191 bcm NG/year
- In average just 16% of total daily LNG send-out used in 2014

ALSI: LNG send out (mcm NG/day)



ALSI: LNG inventory (10³ cm LNG)

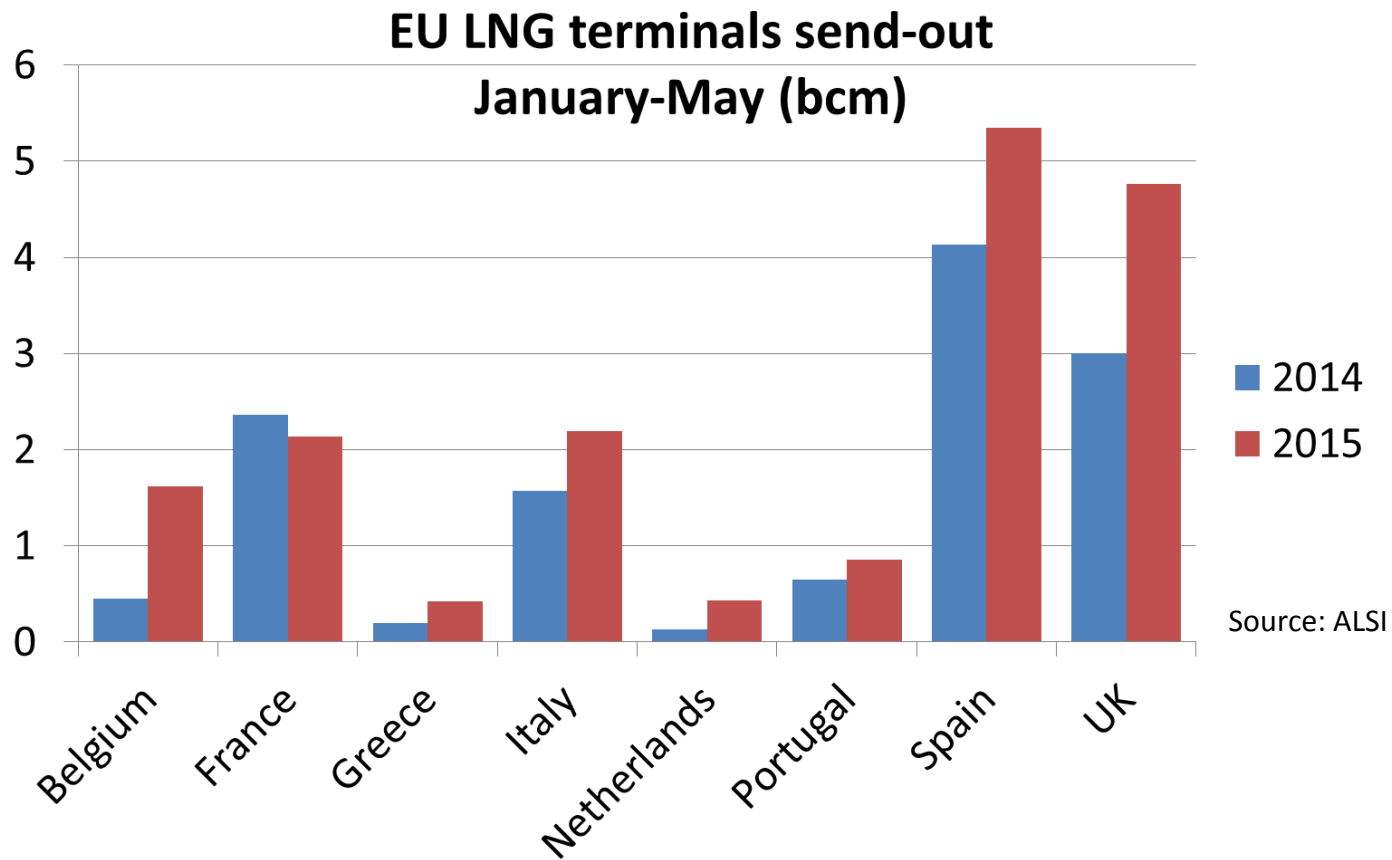


- European LNG storage capacity 8.3 mcm LNG (≈ 4.9 bcm NG)
- Higher LNG storage inventory in 2014 (average 4.6 mcm LNG ≈ 2.7 bcm NG)



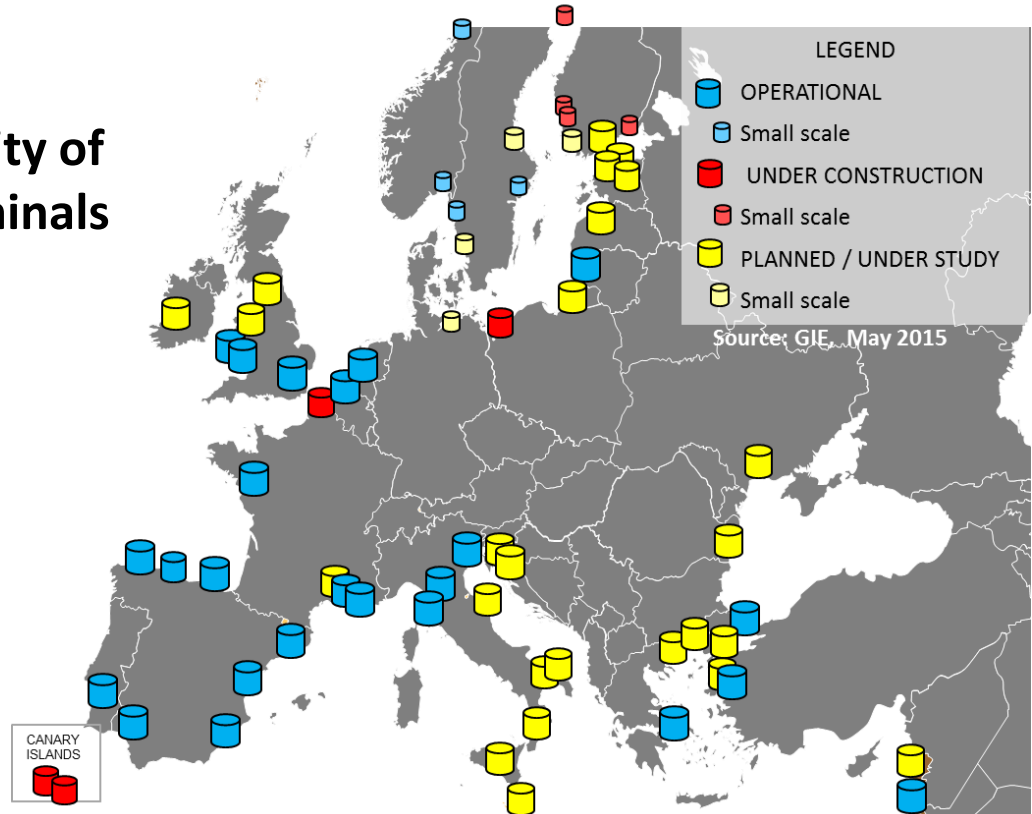
Increasing send out of EU LNG terminals in 2015

EU LNG terminal total send out increased by 42% from January to May 2015 compared to the same period in 2014



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

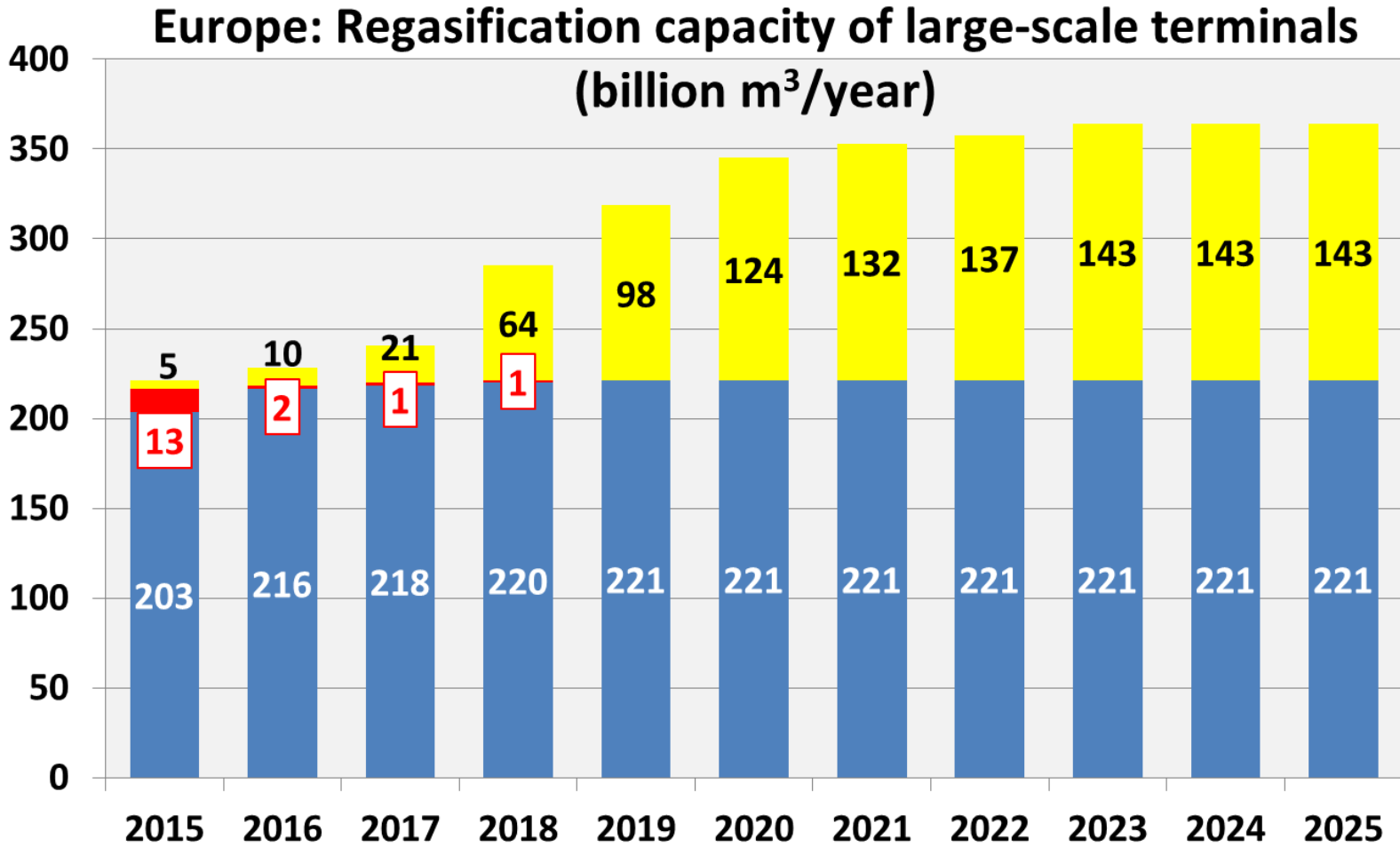
	EU-28	Europe
operational	191	203
under construction	23	23
planned	146	170



Detailed information on LNG terminals available at www.gie.eu, Maps & Data

Number of LNG import terminals per type

	operational	under construction	planned
Large-scale	23	4	22
FSRUs and others	2	0	7
Small-scale	4	4	4
Total	27	8	26

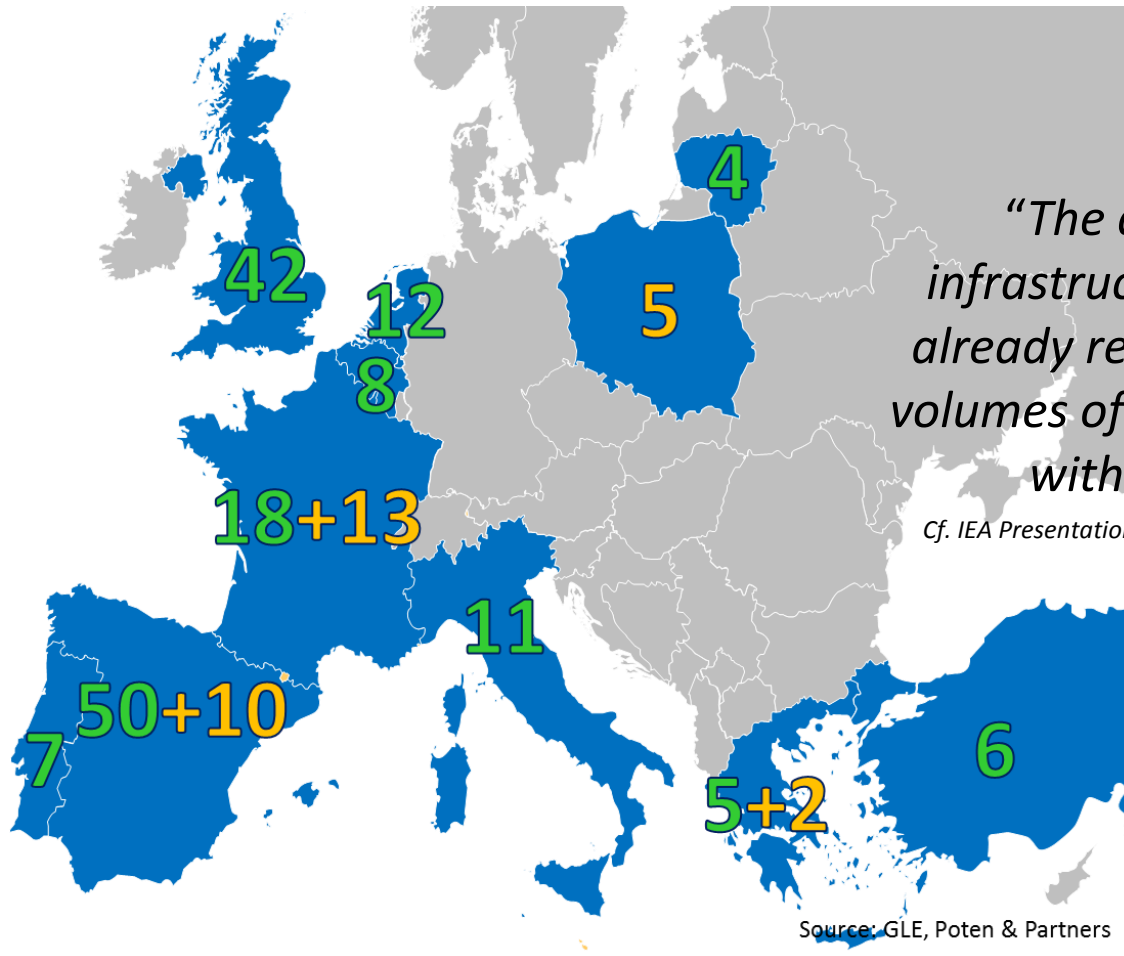


Source: GLE Investment Database, May 2015



Contribution of LNG to security of supply in Europe

- Available (not used) regasification capacity in **2014: 163 bcm/y**
- New capacity from 2015+: **+30 bcm/y**

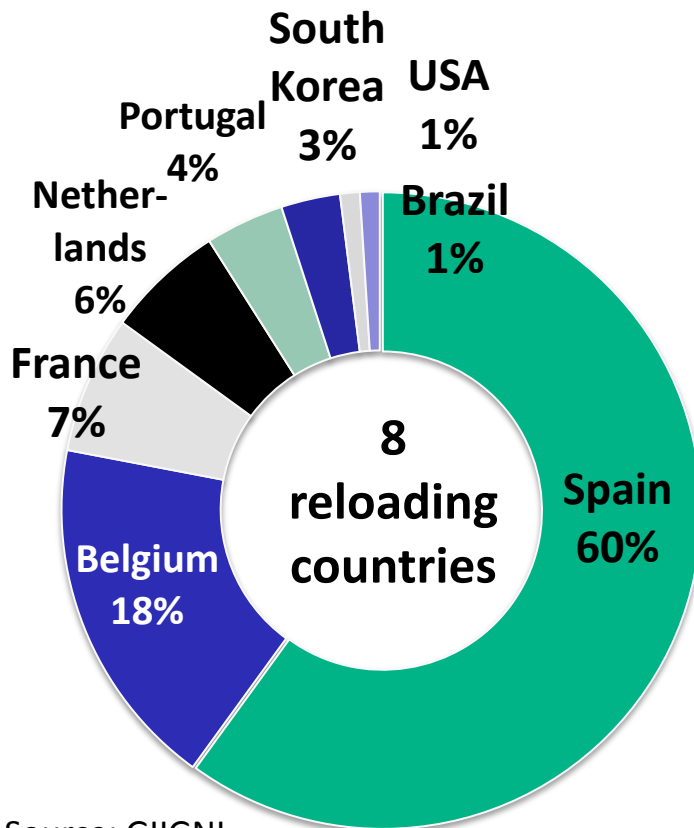


“The current infrastructure could already replace large volumes of Russian gas with LNG”

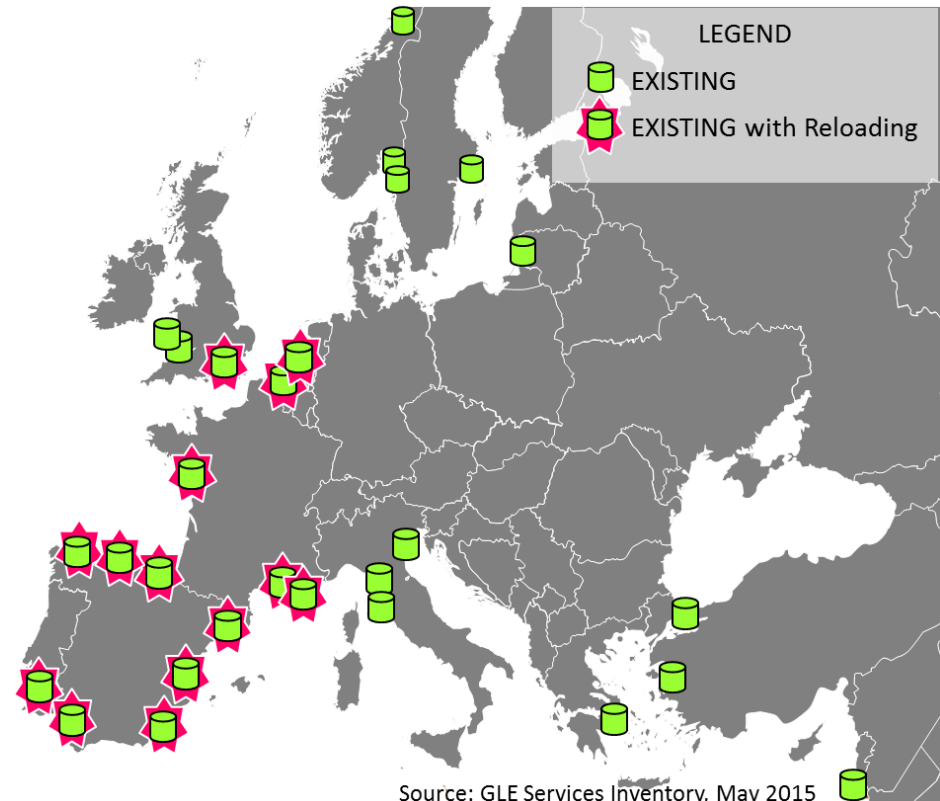
Cf. IEA Presentation at the Gas Coordination Group 10/11/2014

Source: GLE, Poten & Partners

Re-exports loaded by reloading country in 2014



Source: GIIGNL



- Transfer of LNG from the LNG tanks at the terminal into a vessel
- In 2014 more than 130 operations were done and about 14 mcm LNG were reloaded in the EU

- Transfer of LNG from one vessel to another
- Offered in Belgium, France, Spain, UK and from 2H2015 in The Netherlands
- In 2014 one operation was done





Contributing to a low-carbon economy: Natural gas as transport fuel



CNG

LNG

Used in passenger cars, light duty vehicles, busses up to heavy duty in medium range applications

Heavy duty vehicles, vessels and maritime applications

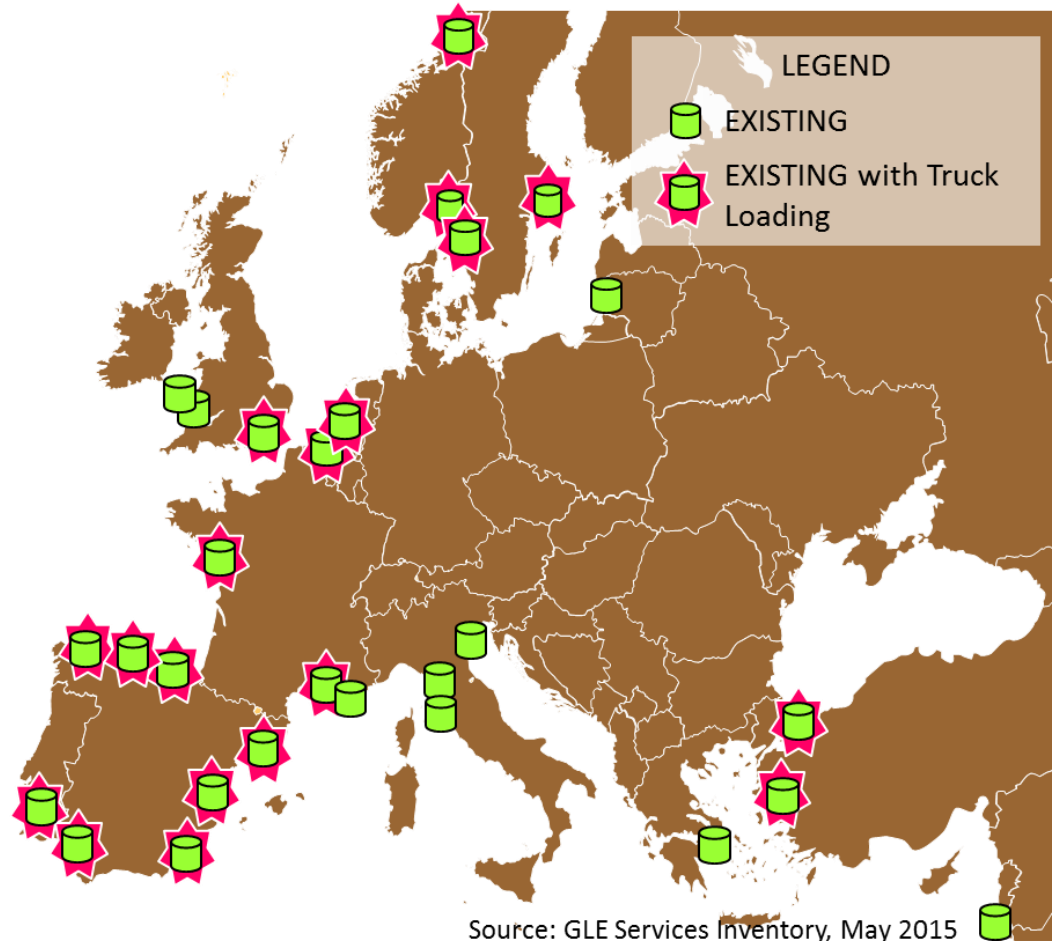
Source: NGVA

➡ **Switching to natural gas will deliver not just CO2 emissions reductions but also significant air quality benefits for citizens, with lower NOx emissions, lower SOx and few particulates**

- LNG is loaded on tank trucks which transport LNG in smaller quantities
- About 42,600 trucks loaded 1.9 mcm LNG at truck loading facilities at EU large-scale LNG terminals in 2014



Source: Reganosa



Loading of bunkering ships

- LNG is loaded on bunkering ships which supply to LNG-fuelled ships or LNG bunkering facilities for vessels
- Available in Belgium, France, The Netherlands and Spain



Rail loading

- LNG is loaded on rail tanks which transport LNG in smaller quantities
- This service has not been available in Europe yet





European SSLNG installations per type

Most of the European LNG import terminals already offer truck loading and the availability of loading bunkering ships is increasing as well

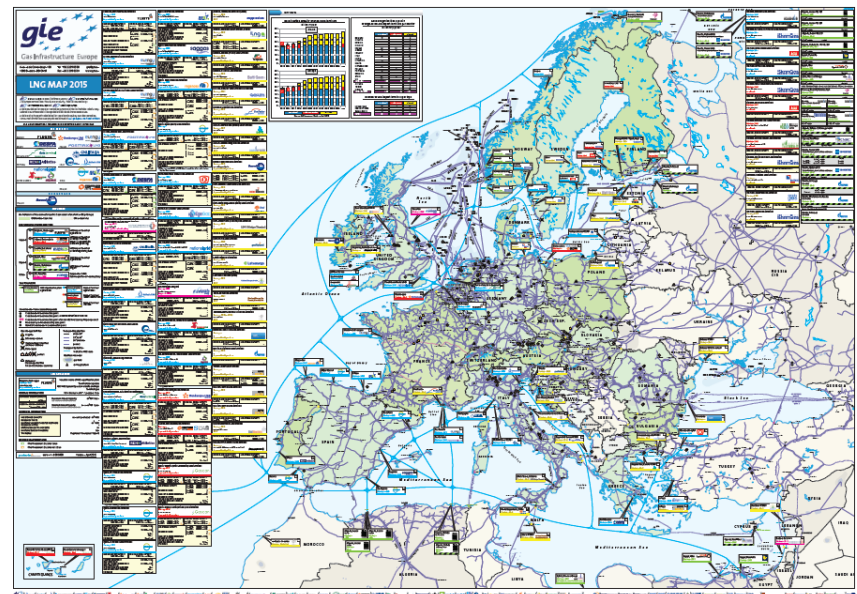
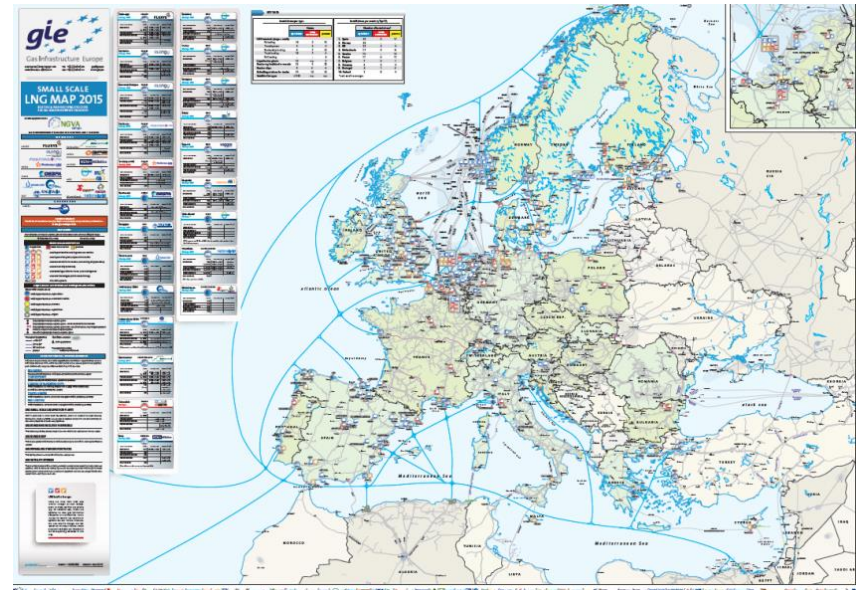
	Status		
	operational	under construction	planned
LNG terminals (large + small):			
Reloading	15	2	12
Transshipment	3	2	4
Bunkership loading	9	7	11
Truck loading	19	8	5
Rail loading	-	-	4
Liquefaction plants	22	n.a.	2
Bunkering facilities for vessels	26	5	22
Bunker ships	5	4	6
Refuelling stations for trucks	70	14	19
Satellite Storages	>1000	n.a.	n.a.

Source: GIE SSLNG Map, May 2015

GIE offers two LNG maps:
LNG and SSLNG Map

Print versions of the 2015 maps (format: A0) will be available from June 2015

and can be ordered at
www.gie.eu



GIE is proud to support



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.

**Thank you
for your kind attention.**

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