



Gas LNG Europe

LNG TERMINALS IN EUROPE

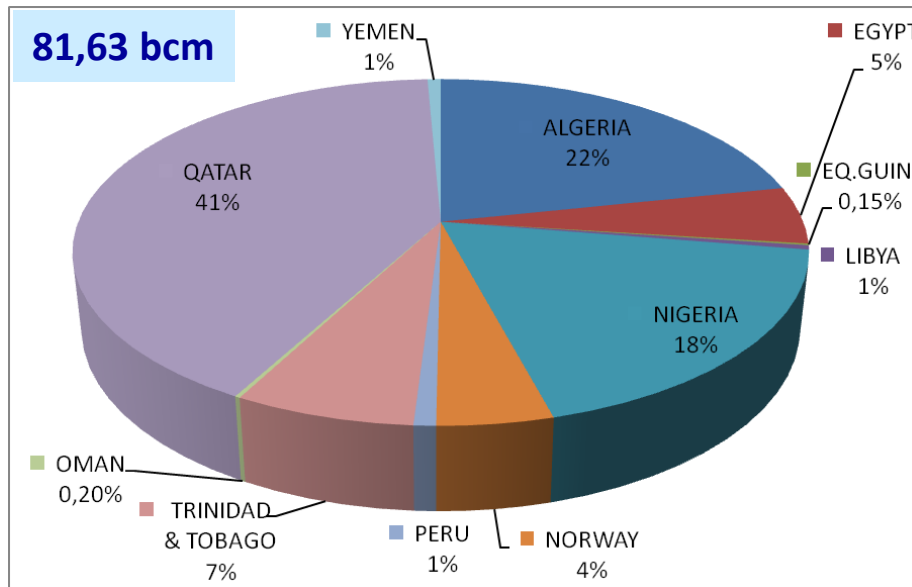
LNG MARITIM ROUTES AND TRADE



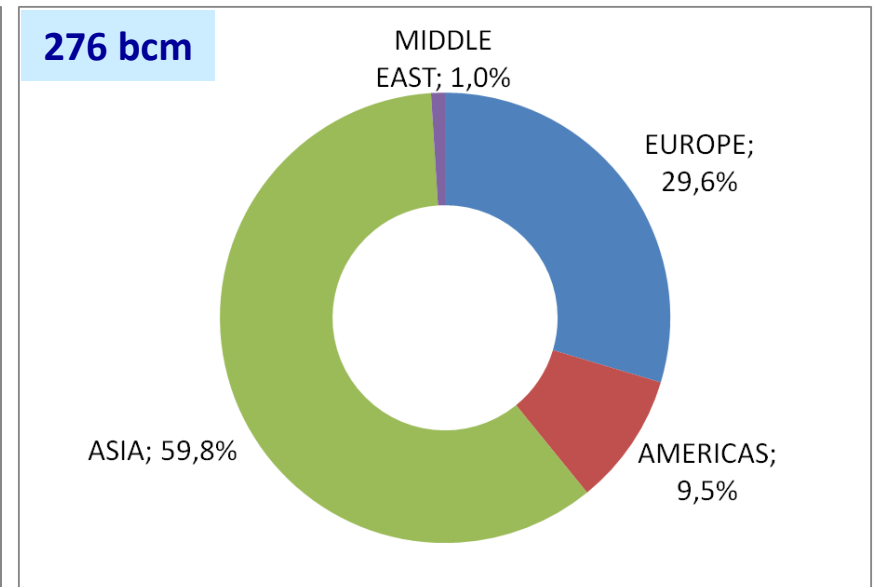
■ IMPORTING COUNTRIES
■ EXPORTING COUNTRIES

SOURCE: GIIGNL

LNG IMPORTS IN EUROPE PER EXPORTING COUNTRY (2010)

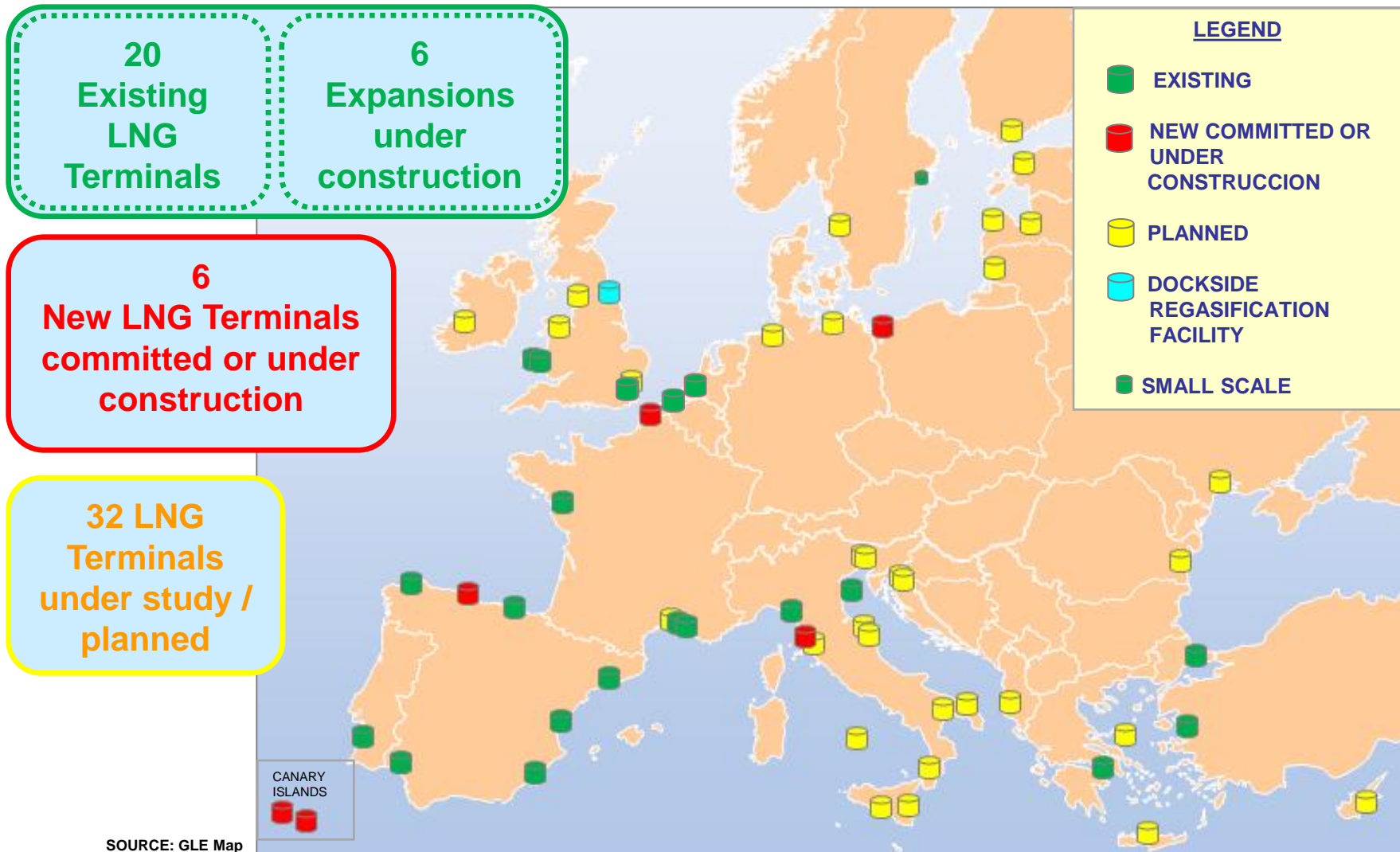


SHARE OF LNG WORLD IMPORTS (2010)



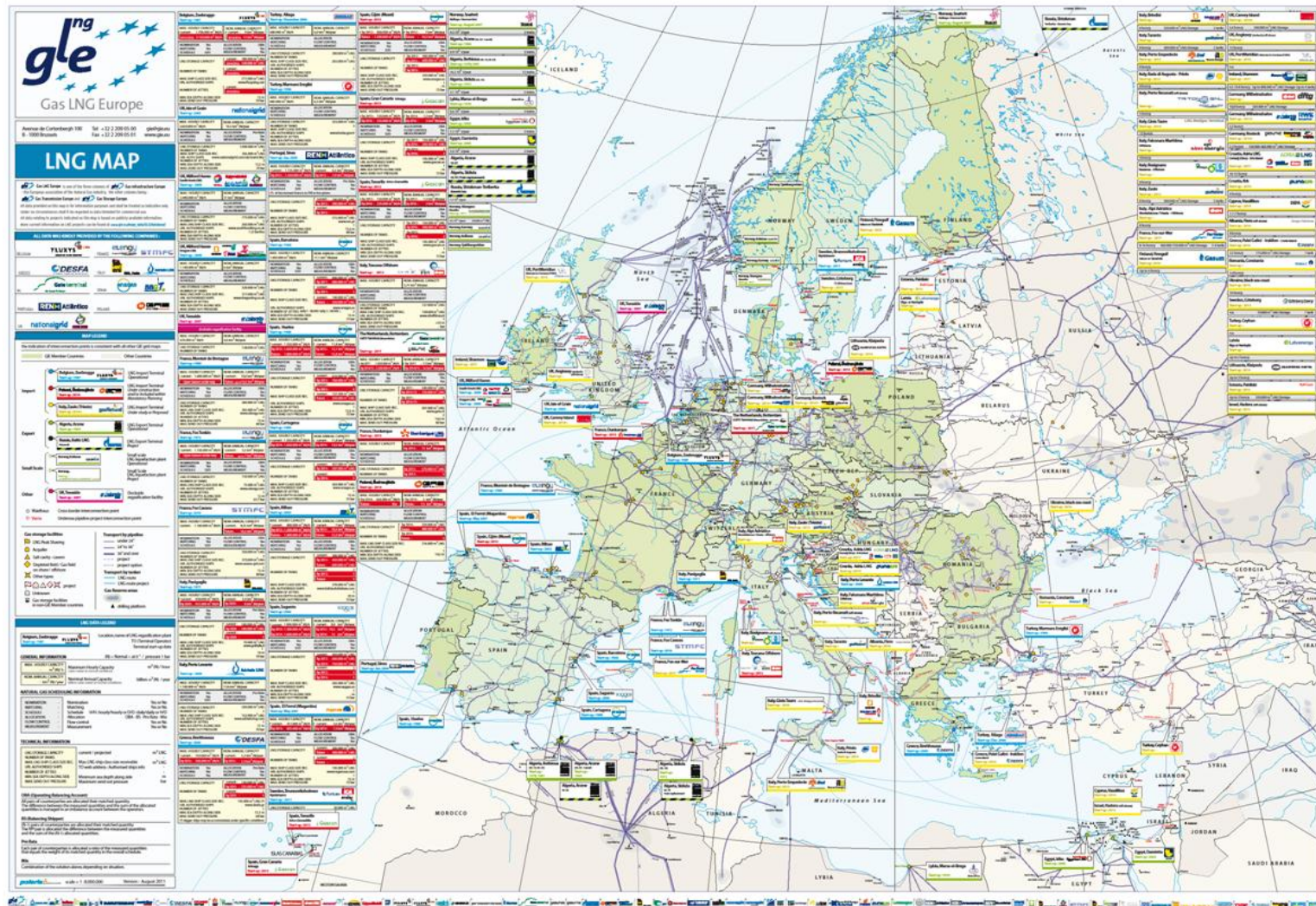
SOURCE: GIGNL THE LNG INDUSTRY 2010
[Europe includes EU-27 + Turkey]

LNG TERMINALS IN EUROPE



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

LNG TERMINALS – GLE MAP

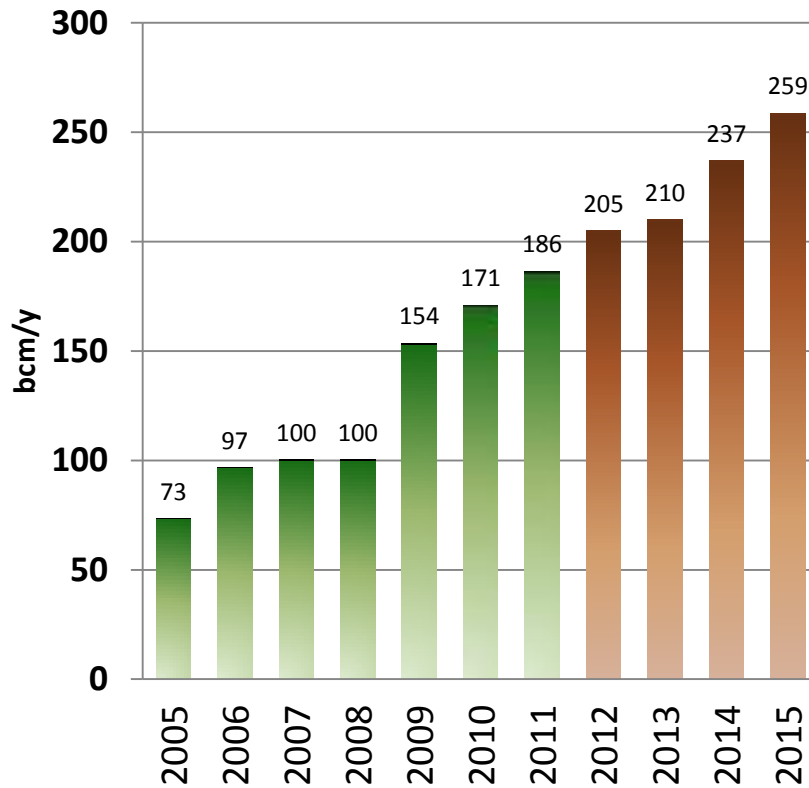


Edition August 2011 / The GLE Map is available at http://www.gie.eu/maps_data/Lng.asp

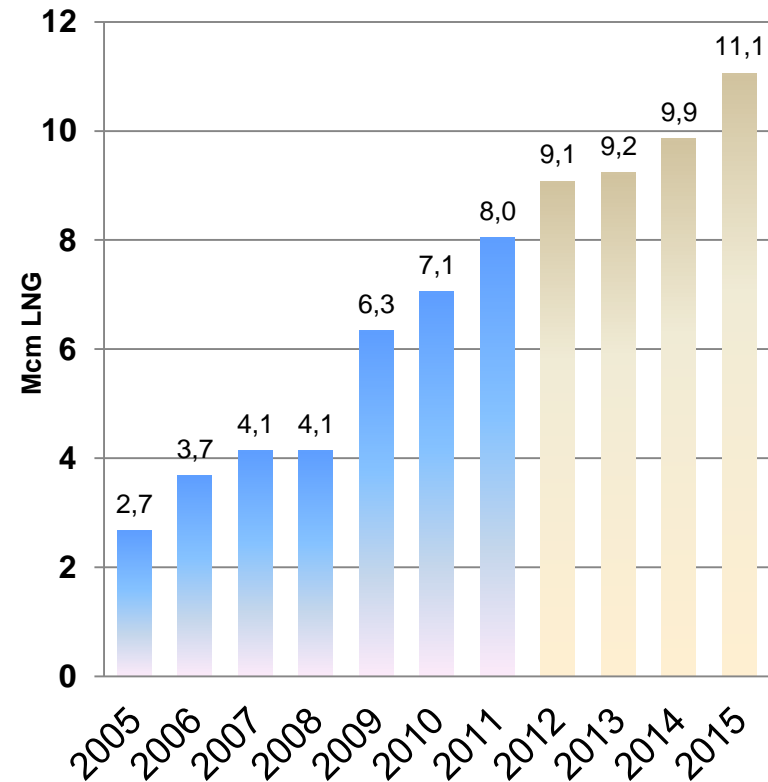
LNG TERMINALS IN EUROPE EVOLUTION OF CAPACITY



REGASIFICATION CAPACITY IN EUROPE

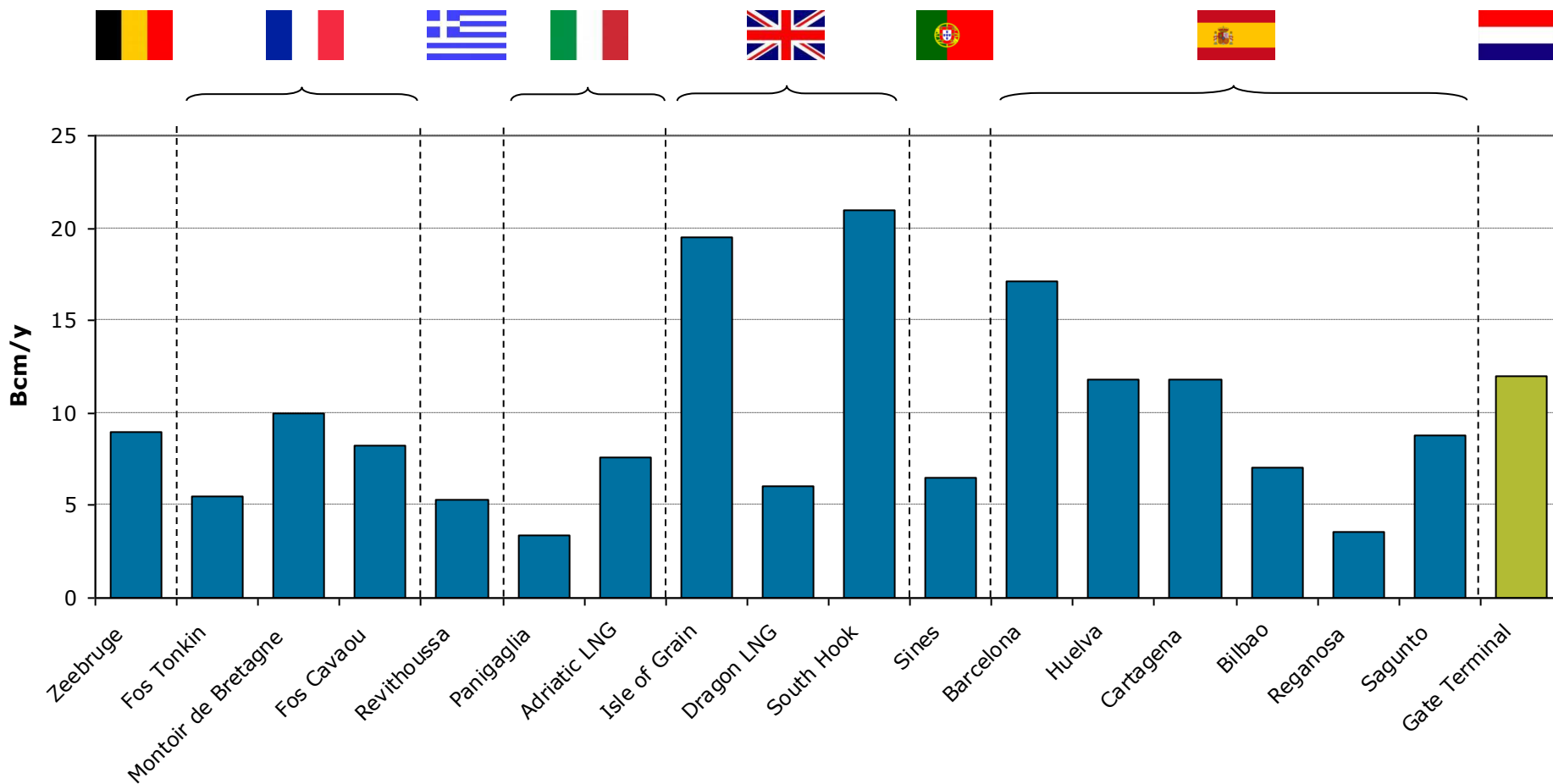


LNG TERMINALS' STORAGE CAPACITY IN EUROPE



Source: GLE MAP & GLE INVESTMENT DATABASE

LNG TERMINALS IN EUROPE: NOMINAL ANNUAL CAPACITY

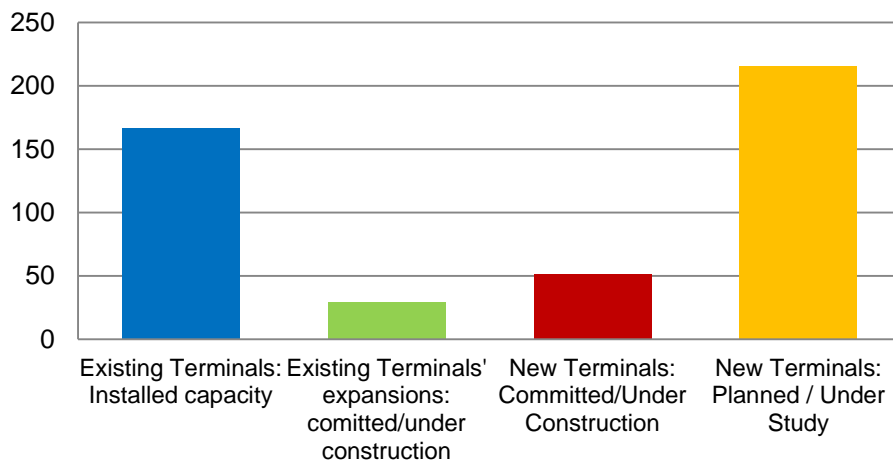


Source: GLE MAP

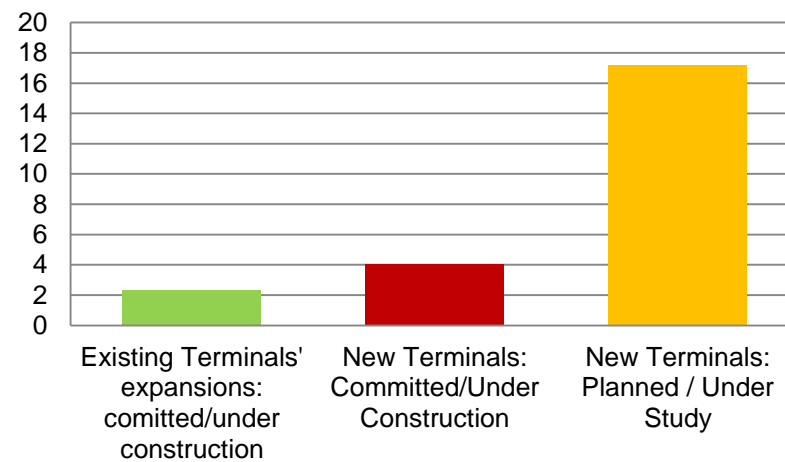
POTENTIAL LNG INVESTMENTS IN EUROPE 2011-2020



LNG TERMINALS 2011-2020 (bcm)



LNG TERMINALS 2011-2020 (bn€)



Source: GLE INVESTMENT DATABASE & ROUGH INTERNAL ASSESSMENT

- **Significant Investments ongoing**
- **Allowing Supply Diversification**
- **Increasing Gas Supply competition**
- **Contributing to renewables integration**
- **Long-term commitment (regulatory and/or contractual)**

LAST REMARKS AND CONCLUSIONS



- LNG plays different roles in different countries
- LNG contributes to SoS, diversification and competition
- LNG contributes to renewables integration
- LNG provides high level of flexibility
- The price of gas infrastructure is less than 10% of the final price → allows competition on the supplying side and lower prices for consumer
- LNG volumes to EU are increasing (2010/2009: +25 %)

LAST REMARKS AND CONCLUSIONS



- Significant investments on LNG going on
- Great uncertainty about planned projects
- Sound Investment Climate is required
 - Regulatory stability
 - Speeding- up permitting and authorisation procedures
 - Same level-playing field between r-TPA and exempted
- Everyone in EU should have access to LNG



**Thank you
for your kind attention!**