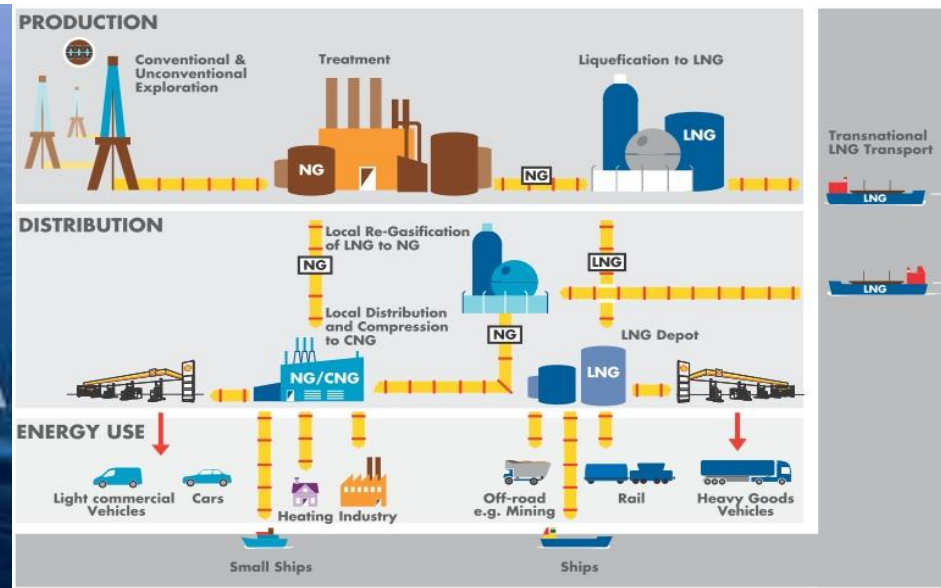


Global Liquefied Natural Gas (LNG) Market Size, Trends & Forecasts (2017-2021)

April 2017



Global LNG Market

Scope of the Report

The report entitled "Global LNG Market: Size, Trends & Forecast (2017-2021)" provide a detailed analysis of global LNG market with analysis of market size and growth. The analysis includes market size in terms of trade volume, demand, and LNG export and import market share by country.

The report provides brief regional analysis of Middle East, JKT (Japan, Korea and Taiwan), China-India, Europe and Americas. Regional analysis include market sizing in terms of export, import and demand. The Middle East has been the largest exporting region over the past few years and is expected to remain the largest exporter of LNG globally.

The report also assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the global LNG market has also been forecasted for the period 2017-2021, taking into consideration the previous growth patterns, the growth drivers and the current and future trends.

A brief company profiling of major market players namely Royal Dutch Shell, ExxonMobil, BP Global and Chevron Corporation has been provided in the report on the basis of aspects like business overview, financial overview and business strategies adopted by respective companies.

Global LNG Market

Company Coverage

ExxonMobil Corporation

Royal Dutch Shell

BP Global

Chevron Corporation

Region/Country Coverage

Middle East

JKT (Japan, Korea & Taiwan)

China-India

Europe

Americas

Global LNG Market

Executive Summary

Natural gas is one of the safest, cleanest and most used form of energy which gives both heat and light. Natural gas is hydrocarbon which means it is made up of compounds of hydrogen and carbon, containing seventy to ninety percent methane in most cases. It can be used as fuel in many sectors as; transportation, industrial, agricultural, and a raw material for petrochemical industry. There are three forms of natural gas: pipe natural gas, natural gas for vehicle (NGV) and liquefied natural gas.

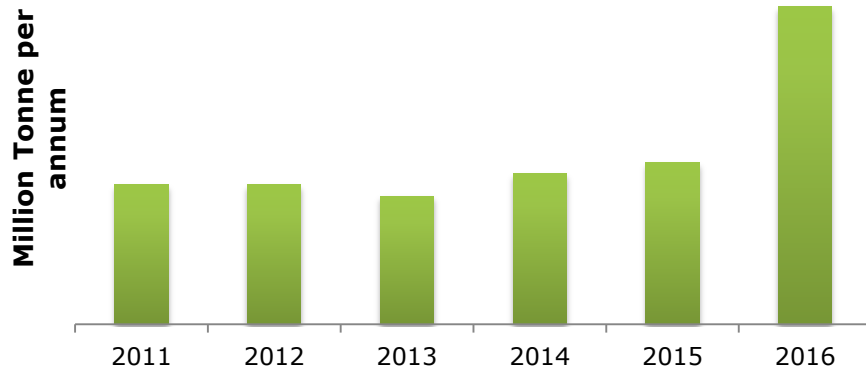
LNG is a clear liquid which forms when natural gas is cooled to -162°C (-260°F). The cooling process shrinks the volume of the gas 600 times, making it easier and safer to store and ship LNG is produced at the so-called liquefaction facilities (plants), following which it can be transported in special cryogenic tanks: sea tank ships or tank cars. It enables rapid delivery of gas to the areas located far from the gas trunk lines.

The global LNG trade volume has increased over the years and projections are made that the market would rise in the next five years i.e. 2017 to 2021 at a rapid pace. Major factors contributing in the increasing trade volume of LNG are start up of several new projects in Australia and Indonesia, rapid economic growth especially of emerging economies, and rising demand for environmentally cleaner fuels etc.

In the forecasted period, market would be pushed by increase in LNG exports, lower shipping cost, technological advancements and access to new markets etc. In spite of high growth in trade volumes of LNG, market is still facing some challenges that are obstructing the growth of the global LNG market. Challenges faced by LNG industry are supply and demand imbalance, lower LNG prices, competition from fossil fuels and renewable energy and emergence of regional trade etc.

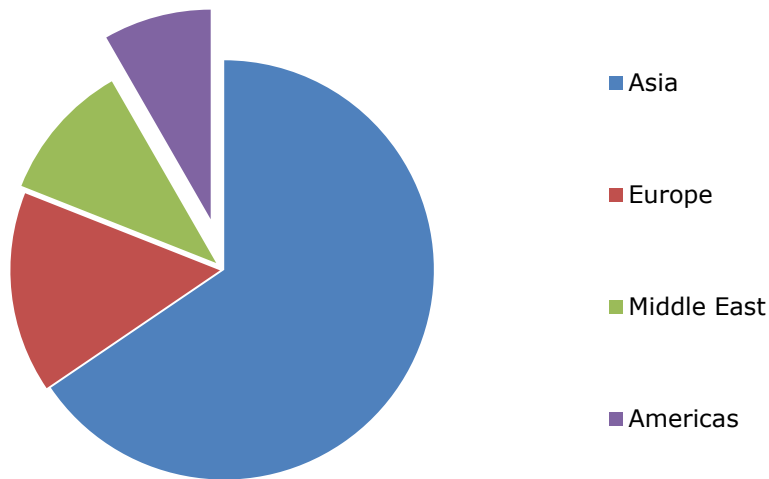
Global LNG Market Overview

Global LNG Market by Trade Volume; 2011-2016
(Million Tonne per annum)



Global LNG trade volume has increased over the years and is expected to grow further in the coming years. Global LNG trade reached million tonne in 2016 from million tonne in 2015 with an annual growth rate of%. Over the period spanning from 2011 to 2016, global LNG trade grew at a CAGR of%.

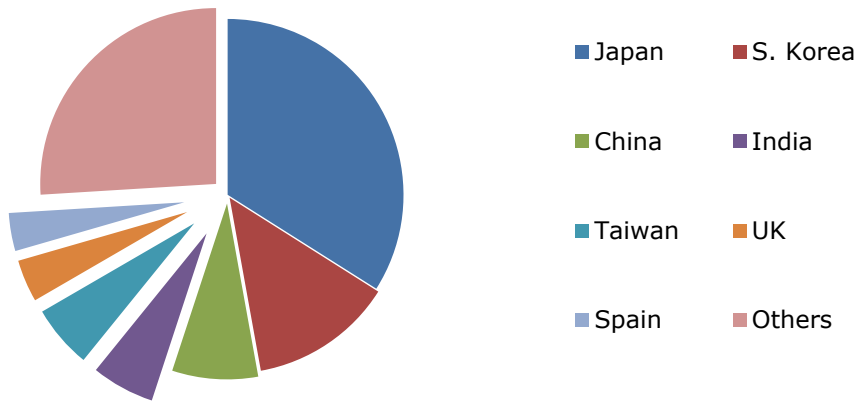
Global LNG Trade Volume by Region; 2016



In global LNG trade volume, Asia region had the highest share due to increasing demand of emerging economies such as India and China in 2016. Asia being the largest market accounted for% share in the global LNG trade. Europe and Middle East were the second and third largest market with a share of% and% respectively. Americas region only accounted for% share in the global trade.

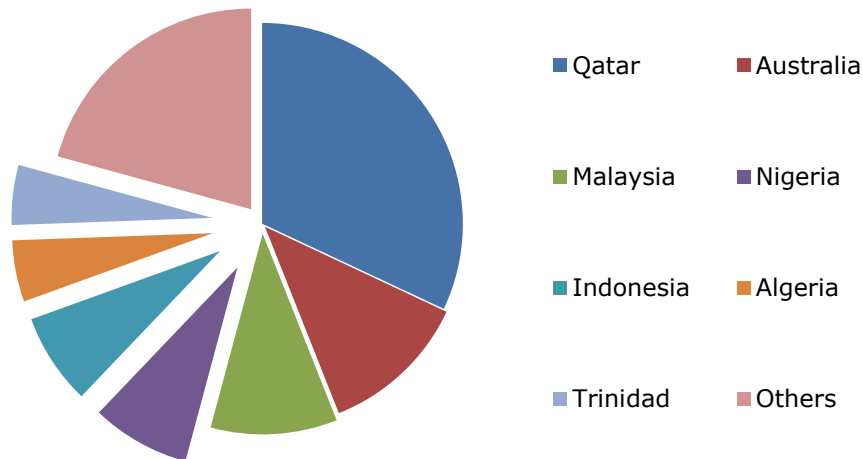
Global LNG Market Overview

Global LNG Import Market Share by Country; 2015



Japan was the largest market in the region (and globally), followed by South Korea and Taiwan. Japan being the largest importer accounted for% share of the global LNG imports. South Korea and China had share of% and% followed by India, Taiwan, UK and Spain with%,%,% and% share respectively.

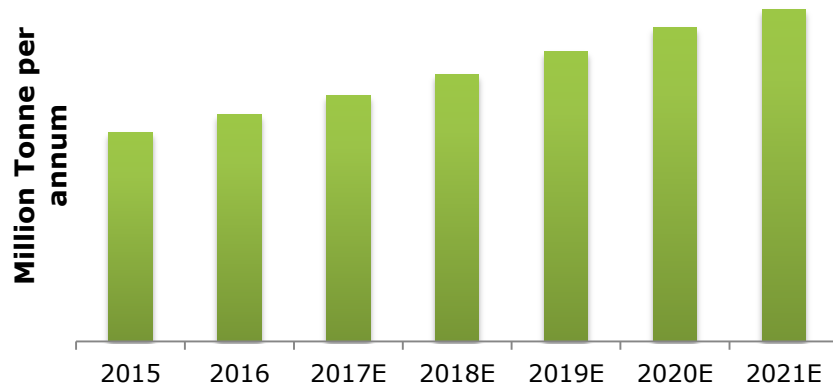
Global LNG Export Market Share by Country; 2015



Qatar alone exported nearly one—third of global trade and remains the world largest exporter. In 2015, Qatar accounted for% share in the global LNG export, followed by Australia and Malaysia with% and% share respectively. Two other major exporters were Nigeria and Indonesia, which accounted for% and% share, while Algeria and Trinidad had share of% and% respectively.

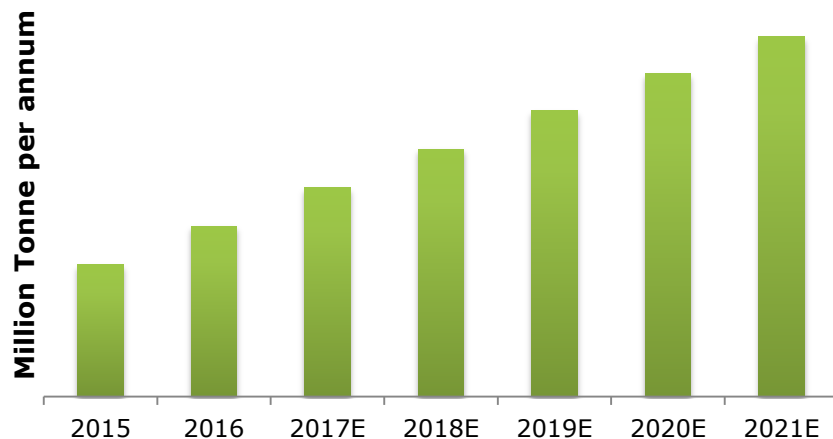
Global LNG Market: Region Overview

Middle East LNG Market by Demand; 2015-2021E
(Million Tonne per annum)



Countries such as Kuwait and UAE are in progress to start importing huge volumes of LNG in order to meet the growing demand of LNG in Middle East. High gas demand in Middle East has led to increase LNG liquefaction capacity. In 2015, demand of LNG wasmillion tonne which is expected to reach million tonne by 2021

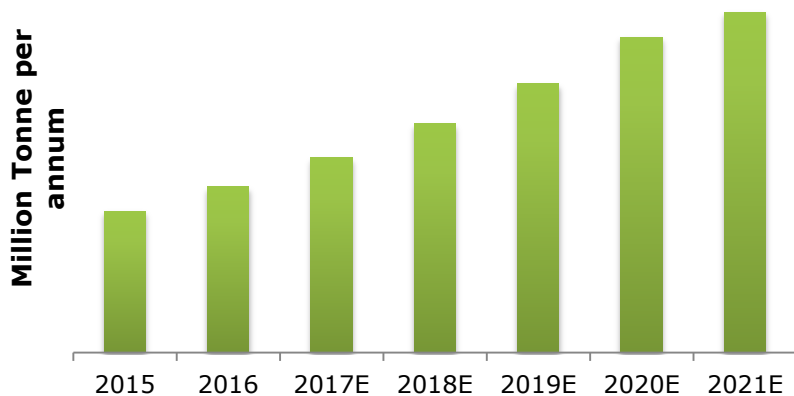
JKT LNG Market by Demand; 2015-2021E
(Million Tonne per Annum)



Japan, South Korea and Taiwan (collectively, JKT) have been and are expected to remain the backbone of the global LNG market. In 2016, demand for LNG in JKT was million tonne, which is expected to reach million tonnes in 2017. Over the years 2017 to 2021, demand for LNG in JKT is projected to grow at a compound annual growth rate of%.

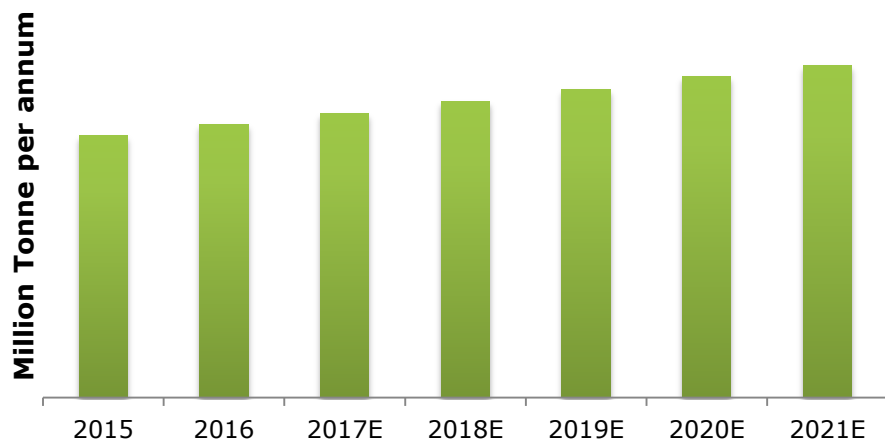
Global LNG Market: Region Overview

Europe LNG Market by Demand; 2015-2021E
(Million Tonne per Annum)



Europe is set to retain numerous gas supply options throughout 2017. European gas demand is expected to increase by% in 2017 to million tonne. Increase in demand of LNG is expected as a result of rising gas consumption for power generation and signs of revival in industrial activity in Europe.

Americas LNG Market by Demand; 2015-2021E
(Million Tonne per Annum)



In 2016, demand for LNG wasmillion tonne which is expected to rise million tonne in 2017. Over the forecasted period i.e. 2017 to 2021, demand for LNG in Americas region is anticipated to grow at a compound annual growth rate of%.