



LNG IMPORT TERMINAL DEVELOPMENT IN EMERGING NICHE MARKETS: BEST PRACTICES

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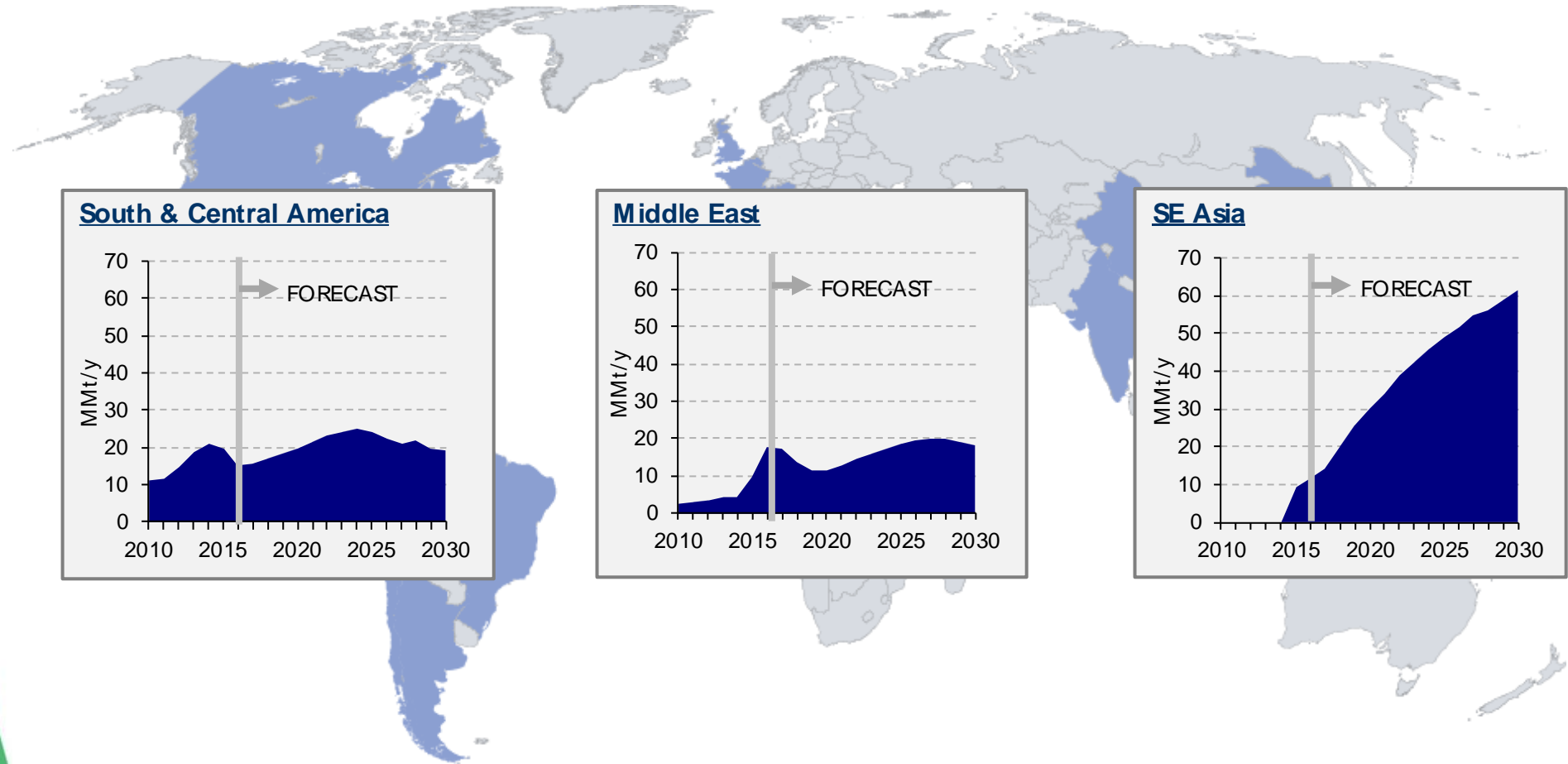
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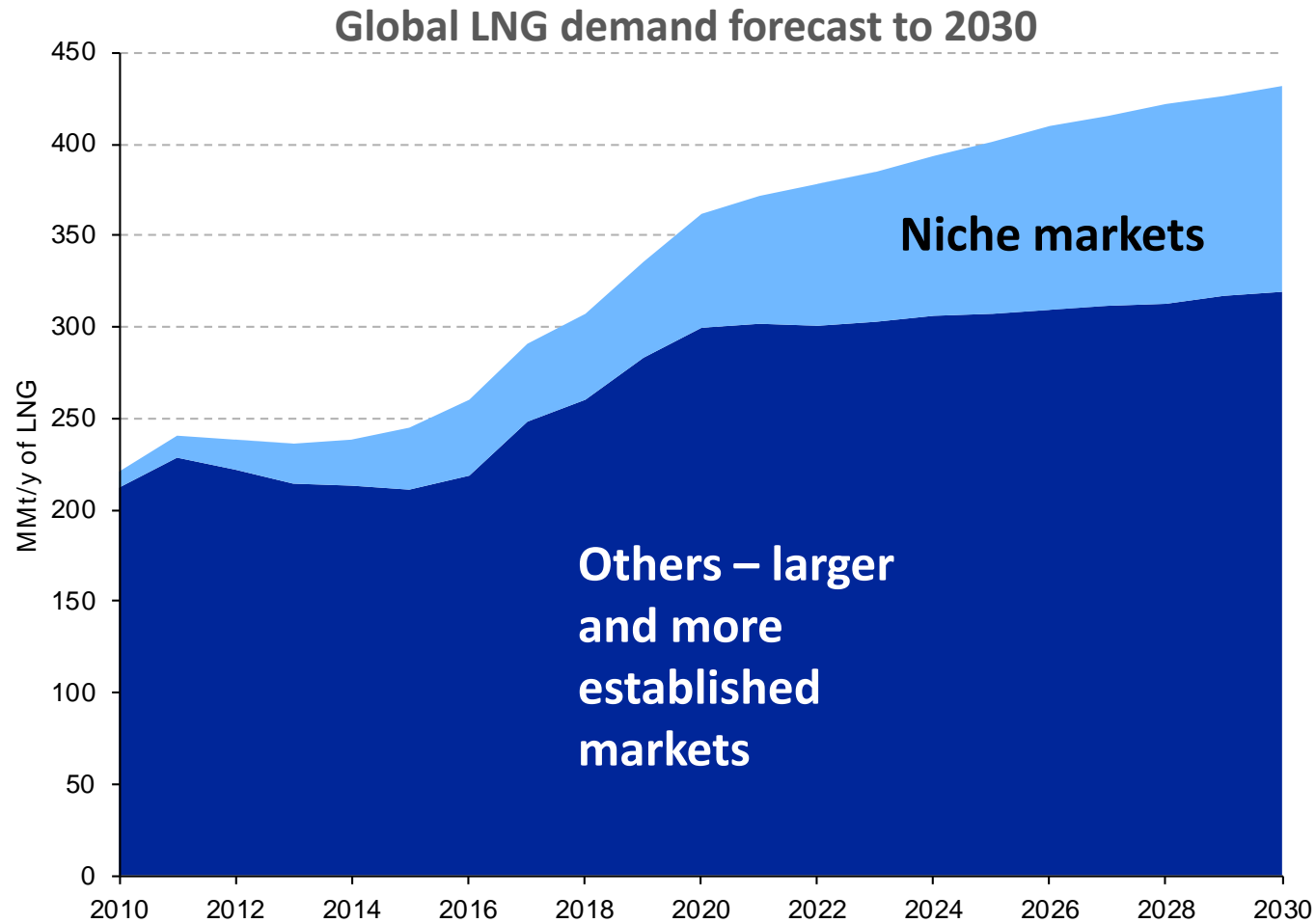
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Taken separately, niche markets are small...

LNG demand forecast to 2030 by region

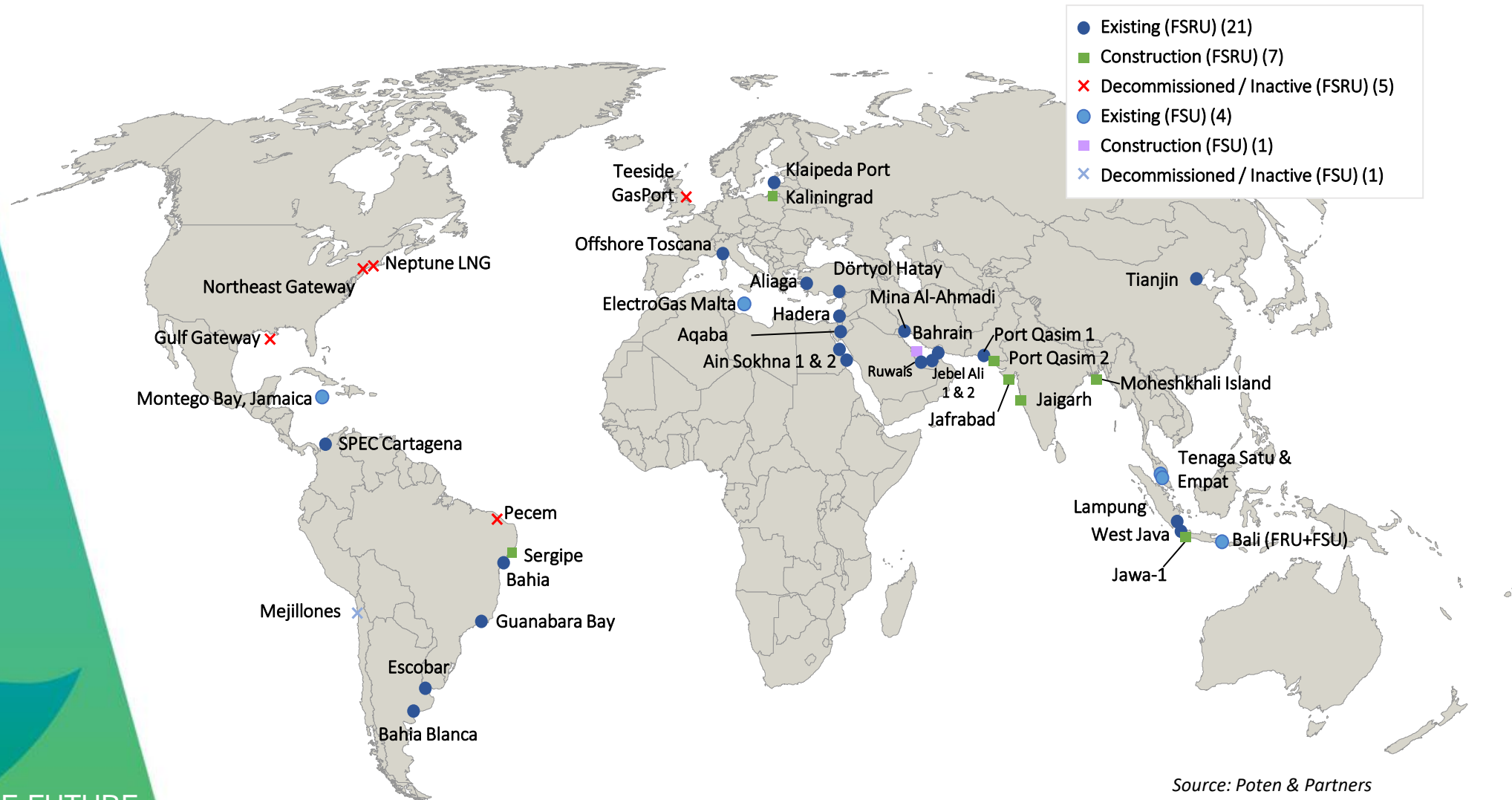


...but they are the growth engine of global LNG



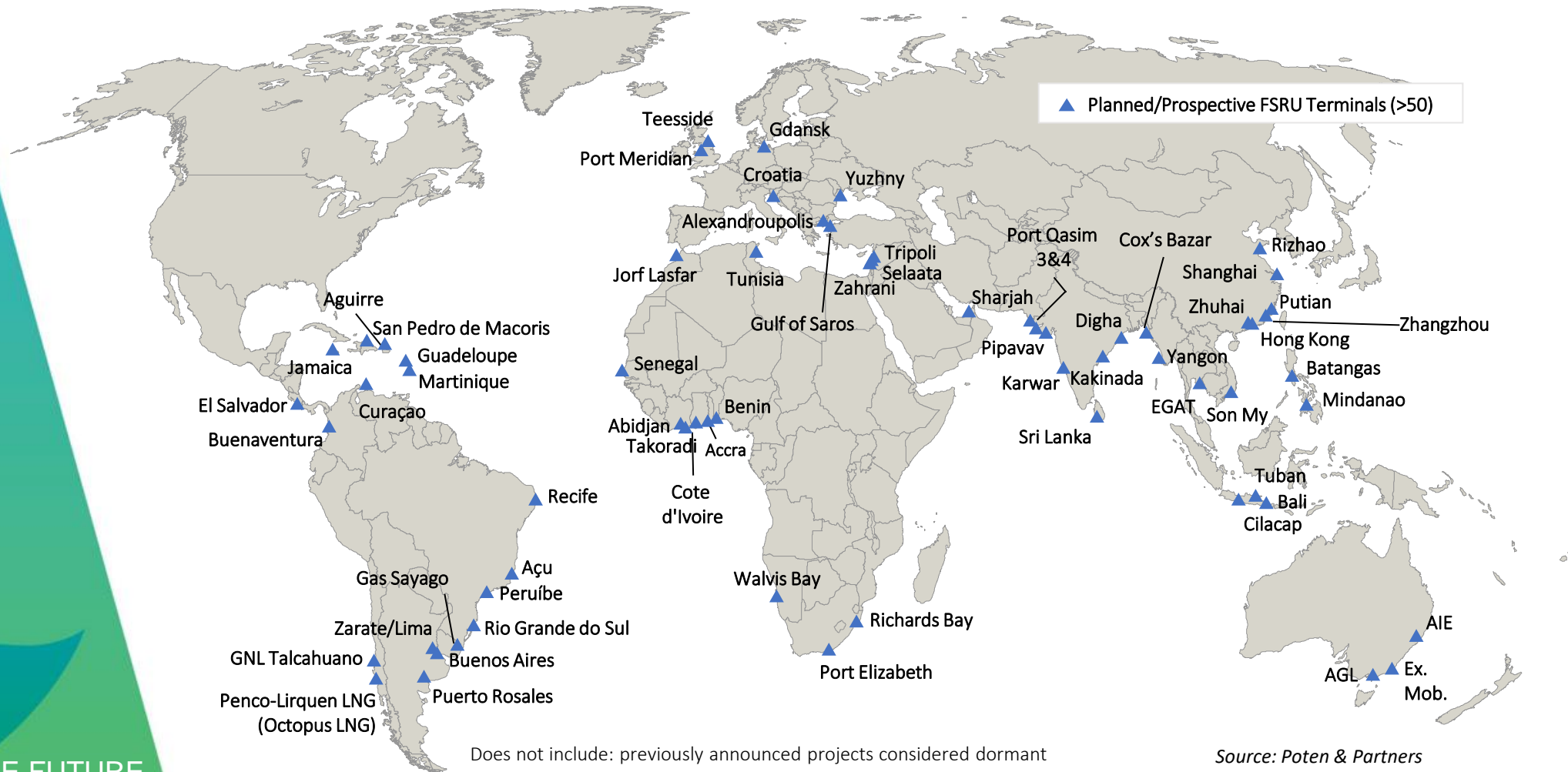
Source: Poten & Partners

FSRU projects underpin niche market development

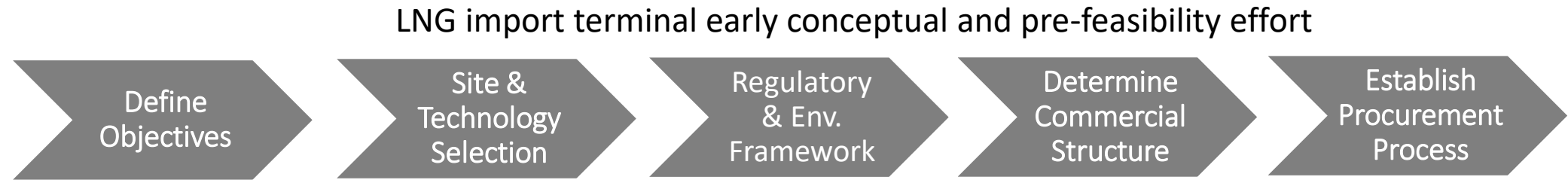


Source: Poten & Partners

Success rate of future FSRUs key to LNG growth

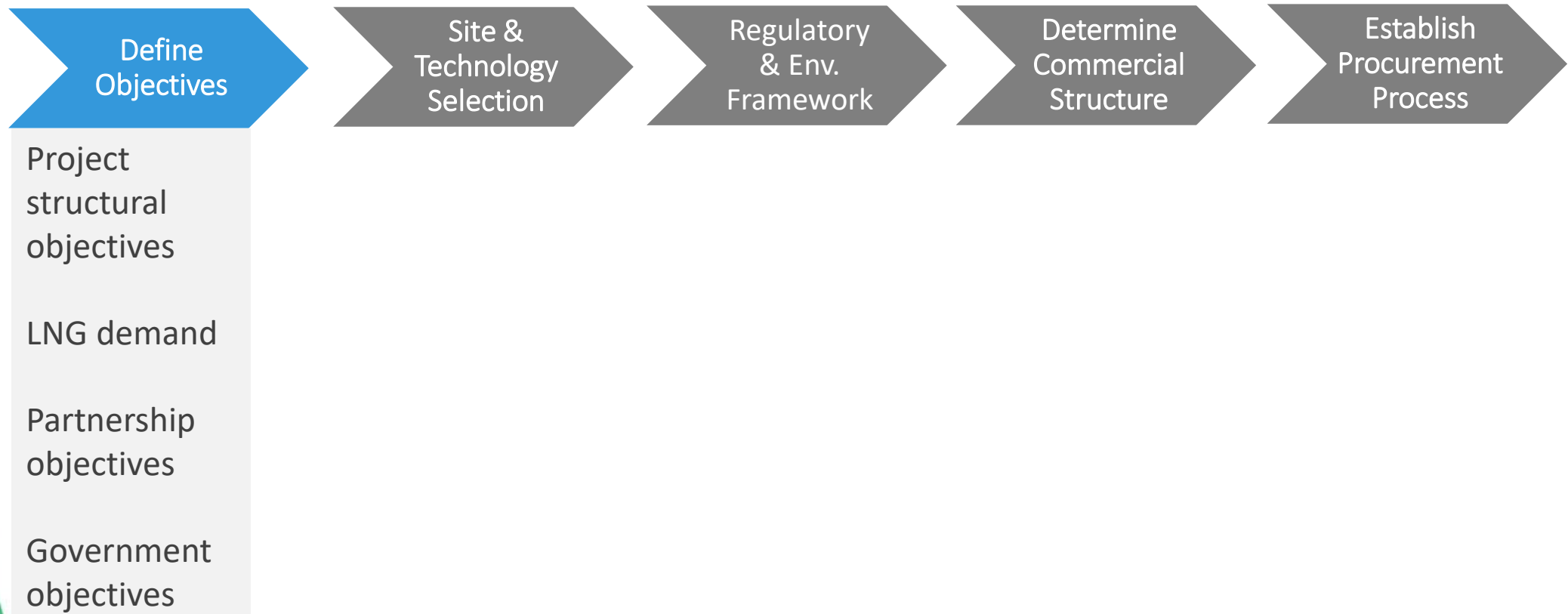


Niche markets' early feasibility effort is critical



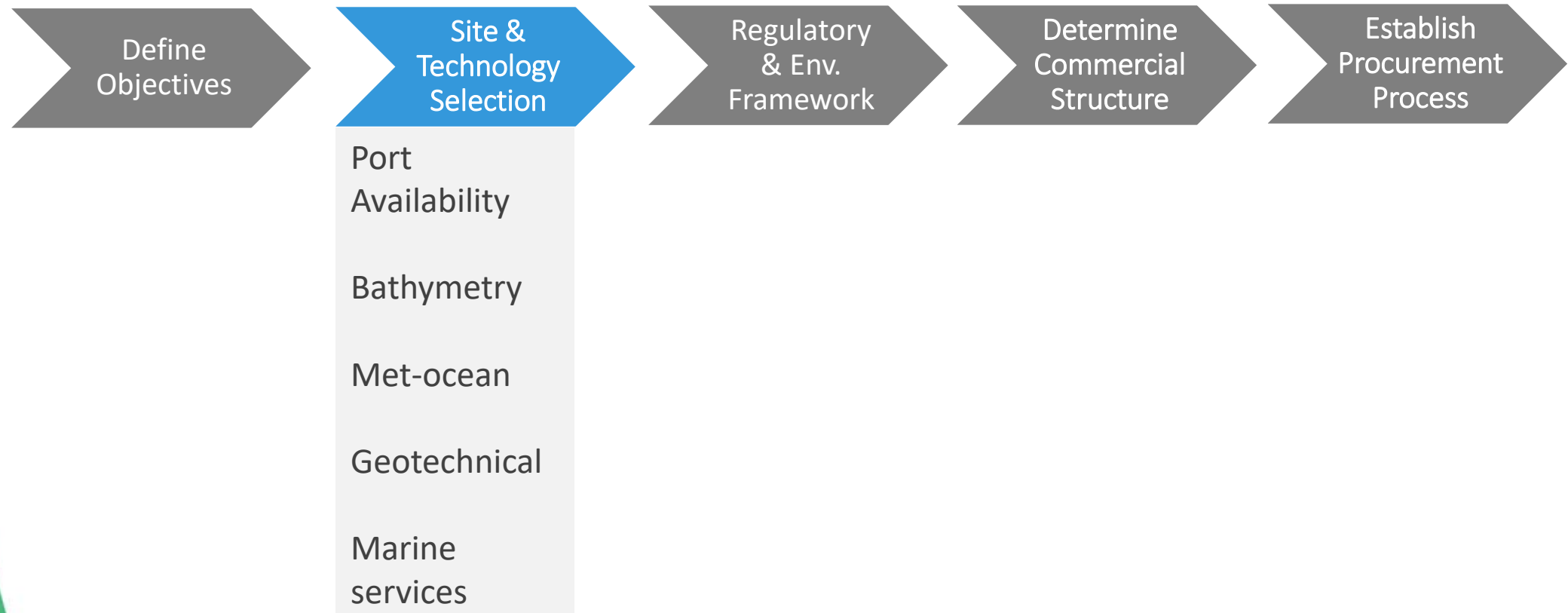
Source: *Poten & Partners*

Defining objectives to better structure development



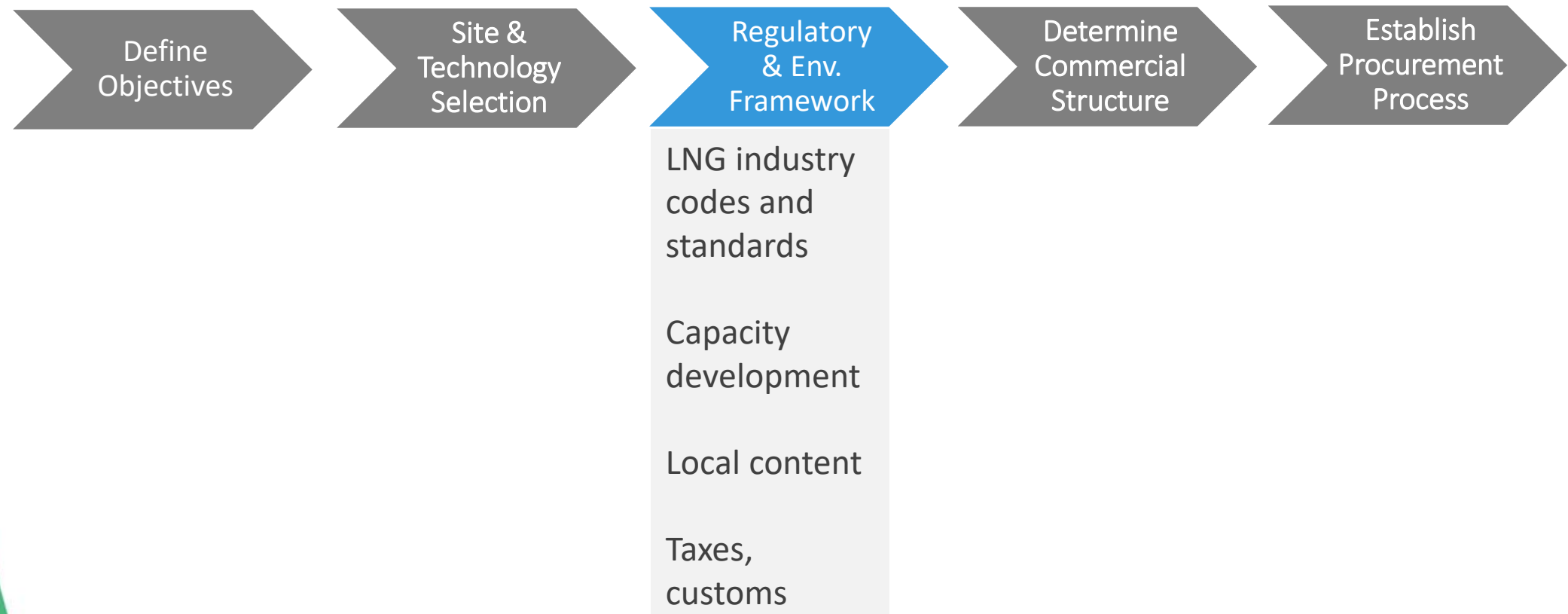
Source: Poten & Partners

Careful selection of site improves cost and feasibility



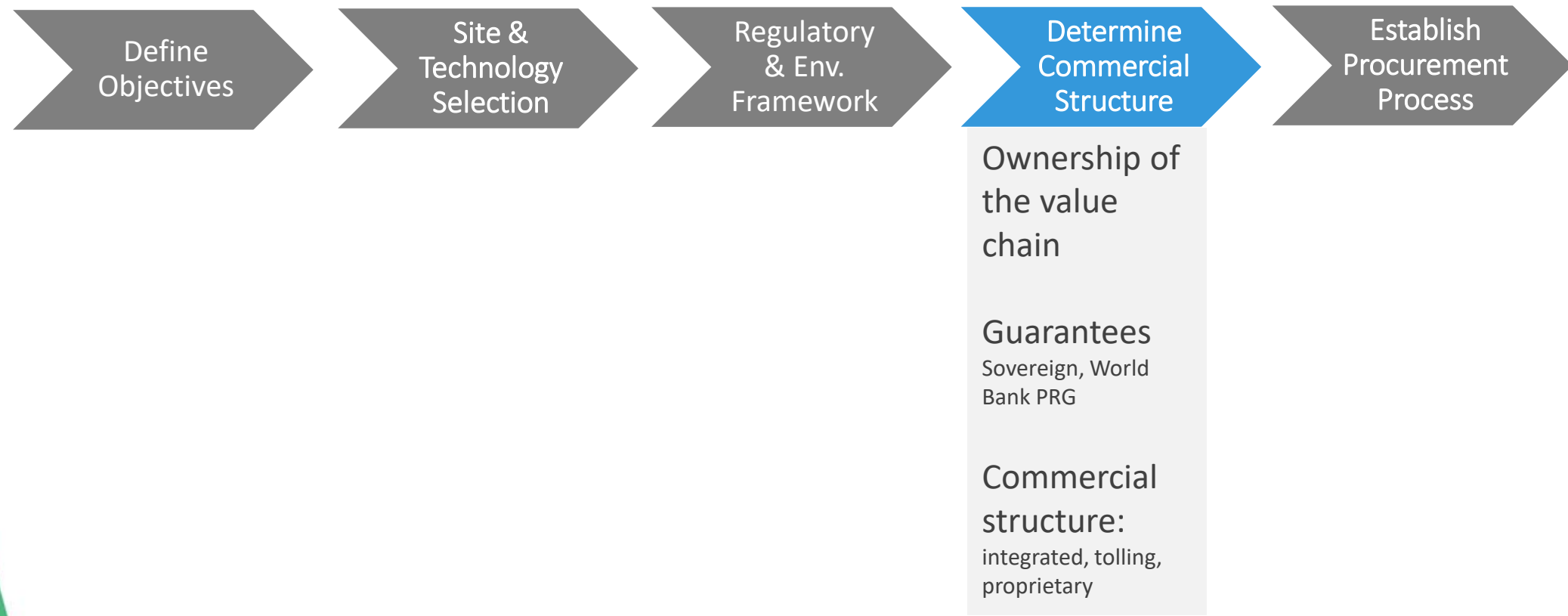
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Early consideration of regulatory environment allows for Government input/support



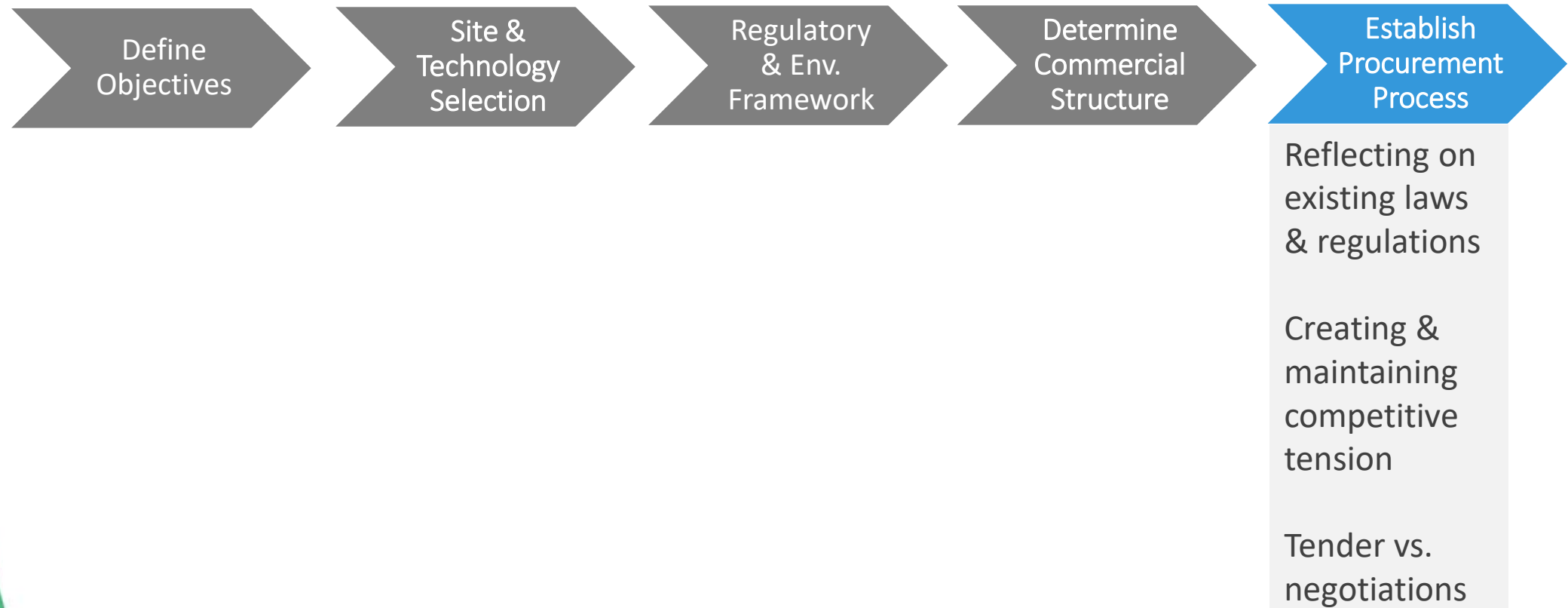
Source: Poten & Partners

A commercial structure that best aligns goals and responsibilities



Source: Poten & Partners

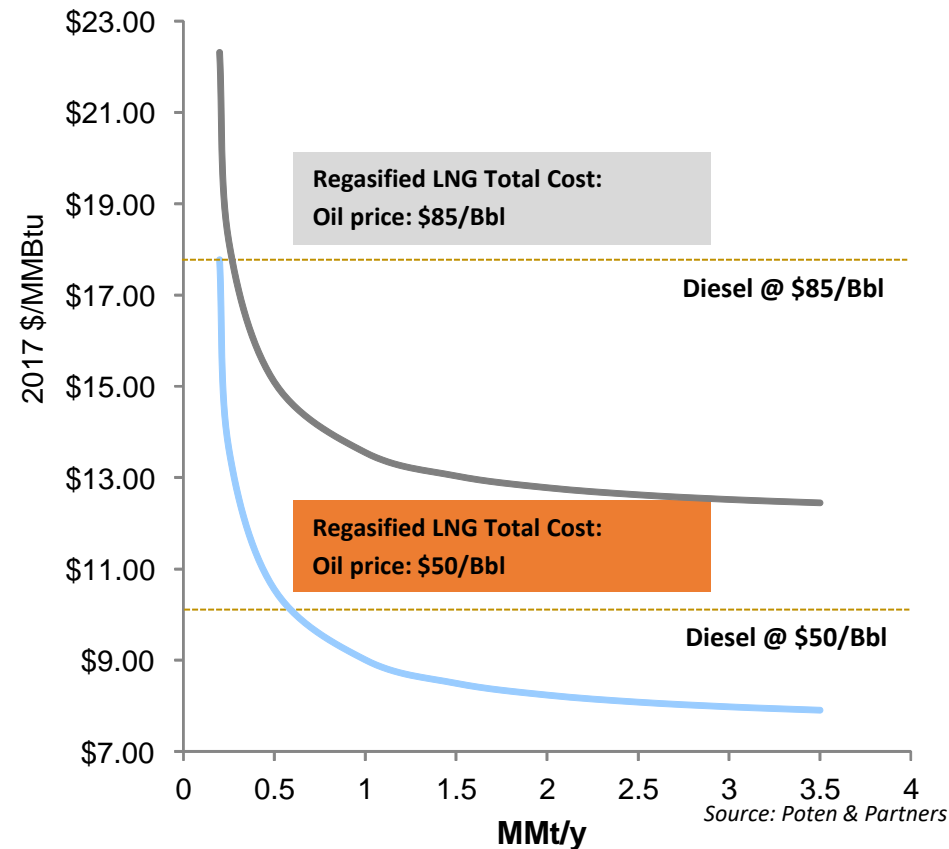
Procurement process within regulatory boundaries – while maintaining competitive tension



Source: *Poten & Partners*

A careful early process improves terminal economics

Economics of LNG (including commodity cost, shipping and regas**) against alternative fuel (example of diesel)



Source: Poten & Partners

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* Total LNG cost (LNG commodity price + shipping + regas)

**This is exclusive of pipeline cost from regas terminal to power plants

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