

The Middle East LNG Institute Weekly LNG Insights

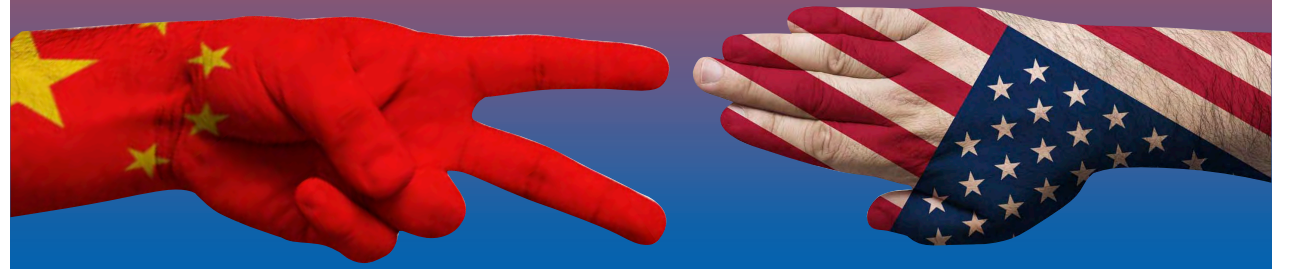
JUNE 21st, 2018

Commoditization Underpins LNG Demand, Supply and Pricing innovations

S&P Global
Platts



China's Threat to U.S. Crude, Coal and LNG Exports is a Tactical Masterstroke



Egypt Purchases Initial LNG Volumes via 9-cargo Tender



Panama Imports Its First LNG Cargo



Trafigura Signs Second Storage Agreement with Singapore LNG Corp



IN NUMBERS

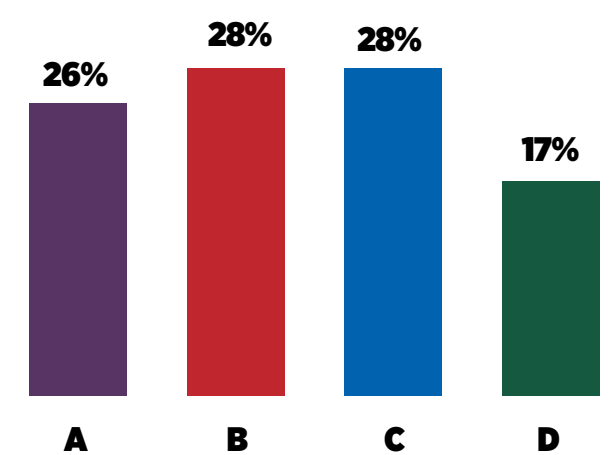
6.4%

The Middle East's domestic gas supply cannot plug its looming power deficit alone, so this source of demand for LNG must be priced into the design of a regional ecosystem. Power capacity in MENA will need to expand by an average of 6.4% each year between 2018 and 2022.

INFOGRAPHIC

Global LNG demand is predicted to grow from 250 million tons per annum (mtpa) in 2015 to 400 mtpa in 2025 – a 60% increase. How much of this 400 mtpa will be 'homeless' and available to the spot market in 2025?

- A. 50 mtpa
- B. 75 mtpa
- C. 100 mtpa
- D. 100 mtpa+



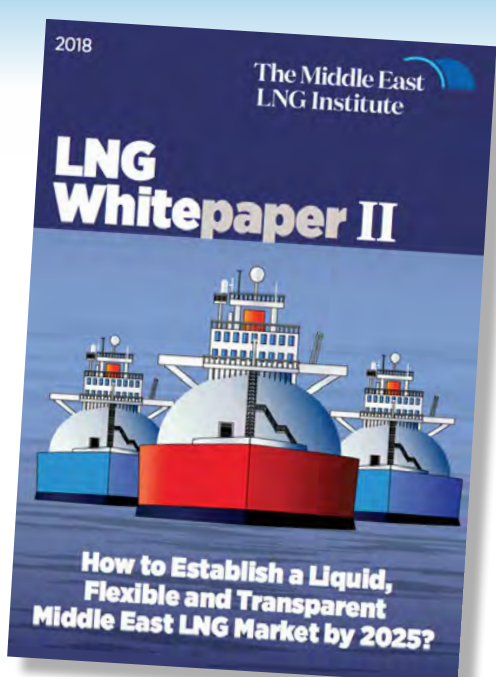
Source: ME LNG Institute Research; Q2 2018

NEWS & EVENTS

Find the latest Middle East LNG Institute White Paper at The 27th World Gas Conference 2018 in Washington, U.S.A set to take place between June 25-29 2018.

Since 1931, The World Gas Conference is the most important global gas industry gathering of influential leaders, policy-makers, buyers, sellers and experts.

To attend the conference visit: www.wgc2018.com



27th WORLD GAS
CONFERENCE
WASHINGTON DC

JUNE 25-29
2018



The Middle East
LNG Institute

Established in 2017, the Middle East LNG Institute examines the evolution of LNG in the Middle East and North Africa (MENA) as the region transitions from a net-exporter to a net-importer. The Institute's mission is to facilitate the region's community of LNG stakeholders and share knowledge and best practices. The Institute also provides the insights needed to successfully navigate through what are still uncharted waters for many Middle Eastern energy stakeholders.

The Institute provides a single, independent and trusted platform for knowledge exchange, data gathering and intelligence sharing for stakeholders. These are crucial tools as the region explores comprehensive solutions to rebalancing one of the starkest juxtapositions in the global energy market. The Middle East is home to more than 40% of global gas reserves, yet the volume of the region's LNG imports is climbing as domestic demand outpaces pipeline supply. The status quo is being rewritten – new demand, new supply, new hubs – and an ability to flex to these dynamic conditions will create the winners of a market that is nearing the top of the global energy hierarchy.

#MELI



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