

# GLOBAL LNG OUTLOOK

A Quarterly Insight Into The Short-Term LNG Market

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PURVIN  
& GERTZ  
INC.

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The global LNG industry is evolving rapidly and is unrecognisable when compared to the industry that existed only a short time ago. A swathe of flexible supply with destination optionality is seeking and competing for the market of highest return. It is estimated that around 40% of LNG supply over the near term will be flexible, raising several questions in a supply constrained market:

- What are the fundamental drivers pushing Atlantic Basin supply East?
- For how long will Northeast Asian buyers pay a premium to Henry Hub for flexible supply?
- When will LNG imports into the U.S. increase?
- Will global LNG trade cause international gas prices to converge?
- What will be the impact of new LNG buyers and delayed gas liquefaction projects on market fundamentals?

As new LNG trade patterns emerge, identifying key trends and issues in an increasingly complex natural gas market has never been more relevant. To address and quantify the impact of changing market fundamentals, Purvin & Gertz has developed a comprehensive report, the **GLOBAL LNG OUTLOOK**, aimed at providing an in-depth perspective of the drivers of the LNG markets on a worldwide basis. The report provides Purvin & Gertz' view of the global gas and LNG markets on a quarterly basis over a forward period of 2-3 years.

To be issued four times a year (January, April, July and October), Purvin & Gertz' **GLOBAL LNG OUTLOOK** will assess:

- The impact of weather and economic growth on gas supply/demand fundamentals

- The effect of new infrastructure additions and delays on short term LNG supply
- The origin, magnitude and destination of flexible supply volumes
- Emerging trade patterns and response to price signals in key markets
- Demand patterns in key consuming countries driving LNG imports
- Competition from pipeline gas supply and the effect of gas storage
- The impact of competing fuels such as coal and residual fuel oil

Purvin & Gertz' approach to this report is to understand the factors that are really driving international gas and LNG markets and to assess their impact in terms of price reaction, quantification of flexible supply availability and the resulting determination of expected LNG trade routes. Unlike many other publications that provide a high level, anecdotal analysis of global gas markets, **GLOBAL LNG OUTLOOK** provides a unique, in-depth perspective on all aspects related to the short term global LNG market. This is achieved by detailed analysis, our industry expertise, use of our comprehensive in-house databases and application of our extensive modelling capabilities.

Why and when, not what and where – **GLOBAL LNG OUTLOOK** will be of value to industry players who wish to look beyond pages of raw data and need to understand what the mass of available information really means in a commercial context. **GLOBAL LNG OUTLOOK** will fulfil this need as it identifies the real issues impacting the market and provides an essential understanding of what is going on in the marketplace.

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