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Through the Panama Canal

The US export boom is forcing the Panama Canal to offer more capacity to LNG carriers

Thailand's need for LNG

PTT's deal with Anadarko for LNG from Mozambique signals a major redirection for Thailand's gas strategy

Progress at Wheatstone

Chevron has begun producing LNG at the first unit of its Wheatstone project

Tax incentives

NextDecade has received a 10-year tax abatement for its proposed Rio Grande LNG export terminal at Brownsville


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COMMENTARY

Panama Canal aims for greater LNG capacity 4
Thailand goes long on LNG with Mozambique supply deal 6

AFRICA

NLNG wins case against NIMASA 8
Mozambique militants attack close to LNG site 8

AMERICAS

NextDecade secures tax incentives for Rio Grande LNG project 9

AUSTRALASIA

AGL regrets gas sales to GLNG 9
Chevron begins liquefaction at Wheatstone 10

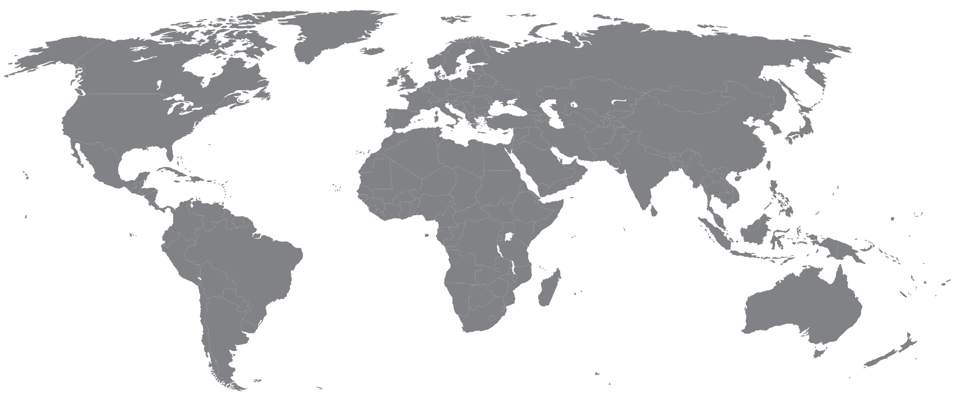
ASIA

Hokkaido Gas to diversify LNG suppliers 10

EUROPE

Gas Natural Fenosa moves HQ to Madrid 11

NEWS IN BRIEF 11



Have a question or comment? Contact the editor – Richard Lockhart (richardl@newsbase.com)

Panama Canal aims for greater LNG capacity

The US LNG export boom is forcing the Panama Canal to offer more capacity to LNG carriers, writes Kevin Godier

US

WHAT:
The Panama Canal Authority aims to increase capacity set aside for LNG vessels

WHY:
LNG transits are currently limited to daylight hours

WHAT NEXT:
The PCA envisages lifting some transit restrictions by October 2018

IN a prospective new boost for LNG shippers using the expanded Panama Canal, capacity set aside for LNG vessels could be doubled within a year.

Rising demand for LNG reservations coupled with expensive delays to some of the transits to date underpin the potential move by the Panama Canal Authority (PCA).

Since commercial operation at the widened canal began in late June 2016, more than 175 LNG carriers have transited the waterway, representing some 8.6% of transits through the New Panamax locks.

The widened facility has been a particular help for US LNG exports, expediting deliveries from the Gulf of Mexico to the Pacific basin, but also for vessels travelling in the opposite direction, mainly from the Peru LNG export terminal.

However, booking transit for LNG vessels through the Panama Canal in advance has become increasingly difficult, with some companies reportedly complaining about finding most of the slots already taken.

LNG vessels have just one guaranteed reservation slot daily for transits through the expanded canal, which, although open around the clock, currently offers only a daylight transit for LNG vessels, from 3 am to 6 pm.

As a result, the PCA is now working towards permitting two LNG vessels a day to transit the canal, to overcome present limitations. "Currently all LNG transits are limited to daylight hours. We are working towards lifting some transit restrictions by the third quarter of next year," the PCA said in a statement.

This followed a June 2017 statement from the PCA's liquids bulk specialist, Jose Arango, to the effect that the authority expected "in the best case scenario" to lift the daylight restrictions by October 2018.

Major upgrades

The canal's new locks, which took nine years to build at a cost of US$5.4 billion, allow vessels moving up to 14,800 containers to cross.

The old locks, which still operate, could only handle ships carrying up to 5,000 containers. The expansion of the locks just over a year ago was designed to allow for larger container ships, but LNG vessels were also able to take advantage of the shorter route.

The expanded canal is able to accommodate about 90% of the world's current LNG tankers. Only Q-Flex and Q-Max tankers, used for exports from Qatar, are not able to use the canal, which reserves an exclusive daily slot for LNG tankers.

The overhauled facilities have proved a critical help to US exporters of natural gas selling to Asian markets, and to the Pacific side of Mexico.

Before the opening of the new Panama locks, which has cut most routes from the Atlantic to Pacific by a third in terms of voyage days, tankers had to go around the tip of South America to deliver gas to South Korean, Chinese and Japanese clients.

The first LNG carrier to transit the expanded canal was the 161,870 cubic metre Maran Gas Apollonia, chartered by Hague-based Royal Dutch Shell, and loaded with a cargo from Cheniere Energy's Sabine Pass liquefaction plant in Louisiana, which recently commissioned its fourth train.

About 42% of Sabine Pass cargoes go through the Panama Canal, said Anatol Feygin, Cheniere's chief commercial officer, quoted on October 9 by The Australian newspaper.

"It's a tool in our arsenal that improves the efficiency of our … deliveries from the Atlantic to the Pacific basin," he noted.

Costly delays

Since its expansion last year, the Panama Canal has imposed daylight restrictions for LNG carrier transits, in order to ensure the safety of the vessel and canal workers.

But the demand for the widened canal is now such that all of the LNG transit slots at the canal have been solidly booked until the third quarter of 2018 by counter-parties including Shell, Spain's Gas Natural Fenosa and South Korea's KOGAS, the authority said.

Shell has offtake from all four trains but primarily Train 1, while Gas Natural Fenosa has long-term offtake from Sabine Pass Train 2.

Transit hold-ups have also posed problems. Although the PCA statement said there were currently no transit delays at the canal, one

> "Since commercial operation at the widened canal began in late June 2016, more than 175 LNG carriers have transited the waterway, representing some 8.6% of transits through the New Panamax locks

seasoned market observer has said that LNG shippers have been experiencing expensive delays in getting their tankers through.

Octavio Simoes, president of Sempra LNG & Midstream, which builds a range of LNG facilities and sells the fuel worldwide, has warned that over one-third of ships are running up against delays in getting through the canal.

Speaking on October 2 at a gas conference in Washington DC, Simoes specified that every day a cargo is held up at the canal can cost a trader US$45,000, and that any regularity in the delays could limit the amount of LNG the US can sell to Asia. To address the problems, "we are working with the current administration," Simoes said.

What next?

Allowing night-time transits by LNG vessels would certainly ease congestion, but, for the time being at least, transporters and traders will have to await the PCA's decision on whether to permit this option.

The PCA is going through an inevitable learning curve following the expansion, with Arango acknowledging earlier this year that any plan to add another slot for LNG would depend on how the LNG market behaved.

The volume of LNG carriers transiting the expanded canal has risen far past an initial projection of just one LNG ship a week, in parallel with soaring US exports of shale gas which show no sign of stopping.

Cheniere has a further four trains under construction at either Sabine Pass or its liquefaction project near Corpus Christi in Texas, while other US LNG projects slated to start production in the near future include Freeport LNG, Cameron LNG in Louisiana and Cove Point LNG. By the end of the decade, it is predicted that six finished US LNG export projects will bring almost 65 million tonnes of LNG to market.

In this light, and as the wider LNG market rapidly embraces spot deliveries and other shorter-term contracts, the PCA understandably remains unsure of exactly how the market in what is a new type of traffic to the canal will continue to develop.

But there is little doubt that the PCA intends to position Panama as the logistics hub of the Americas, fully embracing the needs of the LNG industry, as shown by its aim to add LNG bunkering and redistribution services via a terminal on the Atlantic side of the waterway.

NewsBase Intelligence (NBI) forecasts that by early next year, the unremitting demand for LNG transits through the Panama Canal will be sufficient to persuade the APC to go ahead with its plans for additional capacity.

Looking to the winter ahead in the northern hemisphere, securing advanced reservations will be problematic because most slots appear to be already taken.❖

> “Any plan to add another slot for LNG will depend on how the LNG market behaves

Thailand goes long on LNG with Mozambique supply deal

PTT's deal with Anadarko for LNG from Mozambique signals a major redirection for Thailand's gas strategy, writes Tim Daiss

THAILAND

WHAT:
Thai domestic gas output in declining, prompting the needs for LNG imports

WHY:
Production in the Gulf of Thailand has reached its last phase

WHAT NEXT:
Thailand is securing more import deals in a bid to meet gas demand

THAILAND is forging ahead to replace depleting gas reserves and lower production by signing new LNG supply deals and investing in upstream infrastructure.

The country's latest development came on September 24, when state-owned PTT group signed an agreement to buy 2.6 million tpy of LNG to be extracted by US-based Anadarko Petroleum in Area 1 of the Rovuma basin, northern Mozambique.

Rovuma Area 1 project shareholders will make a final investment decision (FID) by the end of the year.

Gas production is scheduled to begin around 2022-23, said PTT Group board chairman Piyasvasti Amranand, which announced the disclosure. He added that gas sale agreements were scheduled to be signed by PTT and relevant LNG production companies next year.

PTT Exploration & Production (PTTEP), a PTT subsidiary, holds an 8.5% share of the block, while Anadarko, the operator, has a 26.5% stake.

Other partners include Mozambican state-owned Empresa Nacional de Hidrocarbonetos (15%), Mitsui E&P Mozambique Area 1 (20%), ONGC Videsh Ltd (OVL) (16%), Bharat PetroResources Ltd. (10%), and Oil India Ltd (OIL) with a 4% stake.

Running out of gas

This disclosure has at least two significant takeaways. First, it underscores Thailand's diversification plans in obtaining long-term natural gas supplies. According to Thai government data, the country's marketed natural gas production increased substantially for several years, but peaked in 2014 at close to 1.5 tcf (42.5 bcm). Natural gas output has now declined over the past two years, reaching less than 1.4 tcf (39.6 bcm) in 2016.

The country's gas production decline comes amid gas reserve depletion in the Gulf of Thailand, which accounts for most of Thailand's gas output. PTT chief executive Tevin Vongvanich said last year that Thailand was in the last phase of gas production as domestic resources decline.

Unless Thailand can attract more exploration investment and replace reserves at a faster rate, it will increasingly rely on LNG imports. Many analysts doubt that there are any substantial new gas reserves worth exploring in the country

Thailand, Southeast Asia's second largest economy after Indonesia, currently has just one LNG import facility which is located at Map Ta Phut in Rayong Province, operational since 2011.

PTT just doubled the terminal's capacity from 5 million tpy to 10 million tpy and will add another 1.5 million tpy by 2019, for a total of 11.5 million tpy at the facility.

PTT has also plans to build a second terminal that can process 5-7.5 million tpy of LNG. Vongvanich said earlier this year that the second terminal, already approved by the government, should be operational by 2023.

Thailand turns to LNG deals

As Thailand builds up its LNG infrastructure, it is also cutting supply deals. PTT is due to receive at least 4 million tonnes of LNG from 2017 onwards from existing long-term contracts.

BP is delivering 1 million tpy of LNG from 2017, as part of a 20-year supply contract signed in December.

Malaysia's Petronas will deliver 1 million tpy in both 2017 and 2018; and 1.2 million tpy from 2019 onwards as per the terms of a 15-year contract.

In August 2015, Thailand's National Energy Policy Committee gave PTT approval for the purchase of 1 million tpy from Shell Eastern Trading over 15-20 years, but the contract has not been signed yet.

PTT is receiving 2 million tpy of LNG from Qatargas as part of a 20-year contract. Last year, 31 out of 32 of Thailand's LNG cargoes were imported from Qatargas.

PTT is also increasing spot LNG purchases, taking advantage of low spot prices. In 2016, it purchased more than 900,000 tonnes outside contractual obligations.

The company is also considering setting up an FSRU in Myanmar and a third LNG onshore terminal.

Thailand plans to invest in overseas upstream activities to offset its natural gas depletion problems. PTT said in March that it and its subsidiary PTEEP were ready to spend US$11 billion

> "More than US$30 billion is expected to be invested in Mozambique's natural gas sector to build capacity to produce 20 million tonnes per year of LNG

in upstream infrastructure and projects, while looking at early-life producing assets or projects that are already sanctioned and ready for development.

Mozambique's fledgling LNG sector

The PTT-Anadarko deal also highlights Mozambique's growing plans to become a major LNG exporter as the country develops its massive offshore gas reserves.

In August, the Mozambique government signed contracts with Italian energy firm Eni and Anadarko to build two separate LNG terminals in the country.

Both terminals will be built in Cabo Delgado Province near recent gas discoveries that are bringing in much needed foreign direct investment (FDI).

In 2013, Eni discovered natural gas in Area 4 Rovuma Basin (Mamba complex and the Coral field), with estimated recoverable gas resources of more than 75 tcf (2.1 tcm).

Anadarko, for its part, made several natural gas discoveries in Area 1 Rovuma Basin, between 35 to 65 tcf (991 bcm-1.8 tcm) of recoverable natural gas.

More than US$30 billion is expected to be invested in Mozambique's natural gas sector to build capacity to produce 20 million tpy of LNG, with the first exports due to start in 2021, Reuters said in an August report.

However, though Mozambique will likely become an LNG exporter at the beginning of the next decade, it could be short-lived as domestic energy consumption from economic growth puts a strain on those plans.

According to a July 1 World Bank report, Mozambique's economy is set to expand by almost 5% this year, and grow by 7% towards the end of the decade. Energy demand will increase in lockstep.

Ironically, since much of Mozambique's economic growth and corresponding growth in energy consumption is down to its massive energy projects, its gas export ambitions may be a victim of its own energy resources development.

Thailand will have to avoid creating any overdependence on LNG from Mozambique and create a more diversified portfolio of import contracts.❖

> "The PTT-Anadarko deal highlights Mozambique's growing plans to become a major LNG exporter

NLNG wins case against NIMASA

NIGERIA

NIGERIA LNG (NLNG) has won its case against a local agency, with a court ruling that the company was exempt from certain payments on its shipments.

NLNG was liable for a 3% gross "Sea Protection Levy" and a 2% cabotage charge, the Nigerian Maritime Administration and Safety Agency (NIMASA) had said.

In a statement on October 3, NLNG said a Federal High Court in Lagos had found for NLNG. Judge Mohammed Idris ruled that NLNG was not liable for these payments. Furthermore, he said, all such payments that had been made to NIMASA should be refunded.

The dispute between the LNG producer and the Nigerian agency led NIMASA to blockade the Bonny Channel in 2013, halting shipments.

The judge also said NIMASA had been wrong to shutter the channel in order to extract payments from NLNG.

The producer filed a case in 2013 at the court against NIMASA, seeking a judicial finding on their disputes. The NLNG statement said an interim injunction from the court had been disobeyed by NIMASA for three weeks, preventing NLNG vessels from using the channel. The court found that NLNG was not subject to the 3% levy and that the 2% fee was inapplicable, as the company was not involved in coastal trade.

"This decision also affirms the sanctity of the guarantees and assurances conferred on the company and its shareholders by the government of Nigeria, on the strength of which the shareholders made their investments from which the country has reaped immense returns," the statement continued.

NIMASA may appeal against the judgement.

The agency based its position on its establishing act, under which levies are payable on all ships, bar those employed by the military.

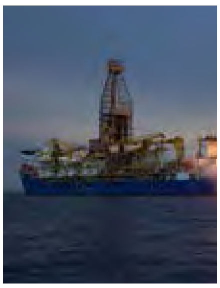
NLNG has 22 million tpy of LNG production, with plans for a seventh train, which would take output to 30 million tpy. The company, in which Nigerian National Petroleum Corp. (NNPC) has a 49% stake, operates under its own act, the NLNG Act of 2004. "No export duties, taxes or other duties, levies, charges or impost of a similar nature shall be payable or imposed on the export of [LNG]", the law states.

NLNG is also exempt from the 3% fee payable to the Niger Delta Development Commission (NDDC), although there has recently been some talk of amending the act to require such payments.❖

"The dispute between the LNG producer and the Nigerian agency led NIMASA to blockade the Bonny Channel in 2013, halting shipment

Mozambique militants attack close to LNG site

MOZAMBIQUE



A group of unidentified militants attacked police in Mozambique's northern Cabo Delgado province on October 5, according to numerous reports. Initially it was suggested the assault may have been carried out by Al-Shabaab – a militant Somali-based Islamist group – but this has been largely rejected.

Whatever motivated the attackers, this will come as a blow to Mozambique's hopes for progress on its LNG project.

A Mozambique government representative reported that three police stations had been attacked, with at least two officers killed. The attackers are also believed to have stolen weaponry in the raid. Two members of the gang were said to have been captured. Attacks took place in the Mocimboa da Praia district, around 80 km from the planned LNG terminal.

The assault followed the shooting of Nampula's mayor, on October 4. Mahamudo Amurane, who was killed in the attack, was shot as he was leaving his house. Amurane had been planning to run in the 2018 mayoral elections as an independent.

He won the 2013 election as a member of the Mozambique Democratic Movement (MDM), a rising opposition force in the country.

MDM broke from the longstanding opposition party, Renamo, in 2009.

Amnesty International issued a statement calling for an investigation of the killing. "Since coming into office in 2013, the Nampula City mayor had bravely tackled corruption head on. It is no secret that this made him a target of attacks, even within his own [MDM] party," said the group's director for Southern Africa, Deprose Muchena.

Mozambique faces a number of challenges, in addition to last week's outbreak of violence it is also struggling with an unsustainable debt load and festering political differences, in addition to experiencing slow progress on the LNG front.❖

"Attacks took place in the Mocimboa da Praia district, around 80 km from the planned LNG terminal

NextDecade secures tax incentives for Rio Grande LNG project

US

TEXAS-BASED NextDecade said last week that it had received a 10-year tax abatement from Cameron County for its proposed Rio Grande LNG export terminal at the Port of Brownsville.

The disclosure came two days after the Cameron Country Commissioners Court approved by a 4-1 vote a series of tax abatements for the LNG export project.

As part of the agreement, the terminal will be built in phases with full abatements for county property taxes during the first 10 years of operation.

Pending a final investment decision (FID) by NextDecade, Rio Grande LNG agreed to make annual US$2.7 million payments in lieu of taxes during all phases.

Rio Grande LNG also agreed to donate up to US$10 million to community projects and to maximise the hiring of local residents during construction and operations.

"These tax incentives are essential to the project's competitiveness, and we are grateful to have received broad political support, evidencing our commitment to safe operations and sensitivity to the region's environment and tourist sectors," NextDecade CFO Atkins said in a statement.

"Rio Grande LNG is ideally located with access to a capable workforce, superb port facilities and abundant, low-cost feed gas from the Eagle Ford and Permian basins." He added that the tax abatements marked the beginning of a "long collaboration" with Cameron County.

Both Rio Grande LNG and the related Rio Bravo Pipeline are awaiting permit approval by the Federal Energy Regulatory Commission (FERC).

The project hopes to receive all necessary FERC approvals by mid-2018, allowing for a FID later that year and first LNG in 2022.

At full build-out, the facility will have the capacity to produce 27 million tpy of LNG.

A local media report said that if approved, the two projects would represent an estimated US$15 billion of private investment in Cameron County.❖

> "The terminal will be built in phases with full abatements for county property taxes during the first 10 years of operation

AUSTRALASIA

AGL regrets gas sales to GLNG

AUSTRALIA

AUSTRALIAN power generator and retailer AGL Energy has publicly regretted its 2015 decision to sell domestic gas to the Santos-led Gladstone LNG (GLNG) project, on the grounds that it has hindered its ability to service more profitable domestic customers.

"AGL would profit more from not selling to GLNG but making the gas available to the Australian market," the energy company's senior manager of sustainable strategy, Richard Clifton-Smith, said on October 6.

"Clearly, if AGL had not sold the gas to GLNG, we would have been in a better position to service our customers," he underlined.

The comments came in response to news articles that AGL said had implied the company was making an ongoing decision to hand the reserves to GLNG instead of the domestic market.

The wider background is one where three Curtis Island-based LNG export projects have come under fire for exporting gas while Australian customers face significant shortages.

AGL signed a deal on December 24, 2015, locking it in to sell 254 PJ (5.8 bcm) of gas to Santos' A$17.5 billion (US$13.64 billion) GLNG venture for export between 2018 and 2020.

This followed a March 2015 deal to buy up to 198 PJ (4.6 bcm) of gas from the Bass Strait fields owned by ExxonMobil and BHP Billiton.

As a result of the GLNG deal, AGL did not have enough gas to supply existing customers coming off contract at the beginning of this year, let alone make offers for new domestic contracts.

Meanwhile, an Australian natural gas shortage, which was generally unanticipated, has been exacerbated by plans at ExxonMobil to cut its gas production at Bass Strait next year to 86 PJ (1.98 bcm), down from a record 330 PJ (7.6 bcm) this year.

The March 2017 closure of the 1,600-MW coal-fired Hazelwood TPP in Victoria has also significantly increased Australia's domestic demand for gas for power generation.

AGL said that since Prime Minister Malcolm Turnbull's threats in recent months to restrict Australian LNG exports, short-term contracts had become available.

"Consequently, AGL has reduced the price at which it quotes customers," Clifton-Smith said.❖

> "Clearly, if AGL had not sold the gas to GLNG, we would have been in a better position to service our customers
>
> ***Richard Clifton-Smith***
> ***Senior manager of sustainable strategy***
> ***AGL***

Chevron begins liquefaction at Wheatstone

AUSTRALIA

CHEVRON Australia has begun producing LNG at the first unit of its Wheatstone project in Western Australia, it announced on October 8.

The start-up of the project, which is a joint venture between Chevron, Kuwait Foreign Petroleum Exploration Co. (KUFPEC), Australia's Woodside Petroleum and Japan's Kyushu Electric Power, came slightly later than expected.

The first cargo is on track to be shipped "in the coming weeks," Chevron said in a statement. It had originally aimed to start exporting from the plant in the middle of this year.

The company expects the plant's second liquefaction unit to start producing in six to eight months' time. The facility will then have capacity to produce 8.9 million tpy of LNG.

When the project was initiated, all of this was expected to be exported to Asia. Chevron signed a deal with Alinta Energy last year, however, to supply 200 TJ of gas per day to the West Australian market.

The issue of LNG exports is becoming more politically charged in Australia as tight domestic supplies contribute to soaring gas and electricity prices in some parts of the country.

Still, Chevron expects LNG exports to more than double from 30 million tonnes in 2015 to 85 million tonnes by 2020, said Chevron Australia managing director Nigel Hearne.

Analysts expect the plant's start-up to weigh on LNG prices.

"Together with Wheatstone, several new LNG trains such as Yamal LNG, Cove Point and Train 4 from Sabine Pass will ramp up or start up production by year-end," said Nicholas Browne, head of Asia gas and power research at Wood Mackenzie in Singapore.

"This will sow the seeds for strong production through winter 2017-18, pushing the market into increasing overcapacity as we move into the summer of 2018. We therefore expect to see prices dip below US$6 per million Btu once this winter is over."

The news came just days after Chevron announced plans, together with Woodside, to invest more than A$200 million (US$155 million) into exploring 23,000 square km of Australia's North Carnarvon Basin.

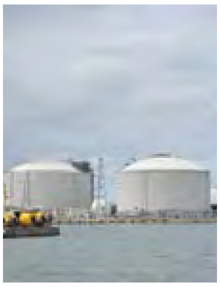
If they find gas, it could be used to feed the Wheatstone plant, as well as Chevron's Gorgon plant and the North West Shelf project, in which the company owns a one-sixth stake. ❖

“The company expects the plant's second liquefaction unit to start producing in six to eight months' time

ASIA

Hokkaido Gas to diversify LNG suppliers

JAPAN



A year after expanding its sole LNG import terminal, Japan's Hokkaido Gas has signed a long-term LNG purchase contract with major domestic general trading house Mitsui & Co. as part of efforts to diversify its LNG suppliers.

Under the deal signed last week, Sapporo City-based Hokkaido Gas will buy about 200,000 tpy of LNG from Tokyo-based Mitsui over 10 years from fiscal 2019, which starts in April 2019.

The LNG to be supplied to Hokkaido Gas will come from Mitsui's global LNG portfolio and be delivered to the Ishikari LNG import terminal on an ex-ship basis, the two companies said.

Hokkaido Gas built the Ishikari LNG import terminal in Ishikari City as the first such large-scale facility on Hokkaido, the northernmost of Japan's four main islands. The terminal started operations in November 2012.

Hokkaido Gas currently has two LNG storage tanks at the terminal – the 180,000 cubic metre No. 1 tank and the 200,000 cubic metre No. 2 tank, which came online in September 2016.

Hokkaido Electric Power, also based in Sapporo City, is building the terminal's 230,000 cubic metre No. 3 and No. 4 LNG storage tanks, which are scheduled to be completed in August 2018 and October 2020 respectively.

Hokkaido Gas has already been buying 400,000 tpy of LNG from Tokyo Gas, Japan's biggest gas supplier, since fiscal 2012 under an 11-year contract signed in August 2011. The deal will expire in fiscal 2022.

The LNG supplied by Tokyo Gas to Hokkaido Gas is part of Tokyo Gas' LNG procurements from overseas projects in Russia, Australia and elsewhere.

In March, Hokkaido Electric signed LNG purchase contracts with domestic peer Kansai Electric Power and a subsidiary of Malaysia's state-owned Petronas.

The LNG from Kansai Electric and Malaysia LNG (MLNG) will be used at Hokkaido Electric's first LNG-fired power plant to be built at a site adjacent to the Ishikari LNG import terminal.

The plant is scheduled to start operations in February 2019.

Hokkaido Electric is to purchase up to 200,000 tpy of LNG from Kansai Electric and up to 130,000 tpy of LNG from Malaysia LNG over 10 years from April 2018 on an ex-ship basis.

Hokkaido Electric will be the last major Japanese power firm to start LNG-fired thermal power generation. ❖

“The LNG to be supplied to Hokkaido Gas will come from Mitsui's global LNG portfolio

Gas Natural Fenosa moves HQ to Madrid

SPAIN

BARCELONA-BASED Gas Natural Fenosa decided late last week to move its corporate headquarters to Madrid. The move followed a week of political unrest in Catalonia that culminated with the regional government taking initial steps to declare itself independent from Spain.

The Spanish government declared a referendum on independence that was held on October 1 as illegal and has used the full force of the state to thwart the secessionists. Over the past week there have been calls for Catalan officials to soften their position and negotiate with the government in Madrid.

Barcelona's Mayor Ada Colau said the referendum could not be used to justify independence and called for Catalan President Carles Puigdemont to pause for talks to commence. But with little room for compromise, the situation remains unclear and tense.

The political risk has prompted several Barcelona-based businesses to relocate their headquarters to the Spanish capital or other cities without Catalonia. Gas Natural Fenosa's board of directors decided during an extraordinary meeting on October 6 to follow the actions of its main shareholder, Caixabank, and relocate to Madrid. The company's gas distribution control centre is located in Barcelona and will remain in the city.

Gas Natural Fenosa is one of the main players in the Atlantic LNG industry. It is the leading natural gas seller on the Iberian Peninsula and is a major gas distributor through pipeline systems that extend over 142,000 km. The company is invested in LNG projects in Qatar, Trinidad and Tobago, Nigeria, Egypt, Oman and the US. It is also involved in gas production projects in Norway and Algeria, and transports gas from Algeria to Spain through the Maghreb-Europe and Medgaz pipelines. It owns stakes in two liquefaction plants – Qalhat in Qatar and Union Fenosa Gas in Egypt. It also has stakes on two regasification plants, Saggas in Spain and Ecoelectrica in Puerto Rico.

Announcing the decision to move to the capital, the board of directors cited the relevant Securities Market Law and said: "In view of the social and political events that are occurring in recent weeks in Catalonia and due to the legal uncertainty that this causes, the council has agreed to change its registered office from Barcelona to the current corporate offices in Madrid."

But the statement underlined that the situation was transitional and could change if circumstances allowed.

The board said it had taken the action in order to protect the interests of its customers, employees, creditors and shareholders.

Earlier this week, Spain's Council of Ministers approved a royal decree amending the Capital Companies Act that allows for the urgent change of corporate headquarters if companies choose to do so.❖

> "The political risk has prompted several Barcelona-based businesses to relocate their headquarters to the Spanish capital or other cities

NEWS IN BRIEF

AFRICA

Gas depot blasts kill at least seven in Accra

At least seven people were killed and scores injured, mostly suffering burns, after two explosions at a natural gas depot in Ghana's capital, fire service spokesman Billy Anaglate said. The blasts on October 7 sent a giant fireball into the sky above the eastern part of Accra, causing frightened residents to flee their homes in large numbers.

Police said the blasts happened in the Atomic Junction roundabout area of Legon, in northeast Accra, at about 7:30pm (19:30 GMT). A statement from the Ministry of Information read out on local radio said that seven people had been killed and 132 were injured. About half of them had already been treated and discharged, it said.

The explosion began at a state-owned GOIL LNG station and spread to a Total petrol station across the street, sending a giant fireball high into the night sky and forcing frightened residents to flee. At least six fire trucks and more than 200 police personnel were deployed to help to cordon off the area of the blasts. Ambulances also arrived and those with various injuries were sent to the hospital.

Al Jazeera's Ama Boateng, reporting from Accra, said that many people are feared dead as the blasts happened at "an extremely busy part" of the capital. "This is a busy interchange and one of the main routes out of the city," she said. "There are lots of buildings and a lot of people in the area, including many street sellers."

AL JAZEERA (QATAR), October 8, 2017

Russian PM talks up Morocco gas projects

Russia and Morocco hope to co-operate more closely in the energy sector, Russian Prime Minister Dmitri Medvedev has said. He spoke of a "very promising project to supply LNG to meet the needs of the Moroccan economy". "The potential for co-operation is huge," he said during a brief press conference.

During his visit the two countries signed deals in the energy, agriculture and hi-tech sectors. "We are discussing further co-operation in the field of nuclear energy or renewable energies," Medvedev said after talks with his Moroccan counterpart, Saad Eddine El Othmani. Medvedev said the two had also discussed transfers of military and security technology.

Russian Energy Minister Alexander Novak visited Morocco in late September and said an LNG re-gasification terminal was being built while the two countries held talks on gas deliveries by the Russian groups Gazprom and Novatek, local media reported. Morocco has few oil and gas reserves of its own and is planning to open an LNG terminal at Jorf Lasfar on the North African country's Atlantic coast in 2019, according to the energy ministry.

Medvedev also visited Algeria this week, where he was received by ailing President Abdelaziz Bouteflika.

AFP, October 12, 2017

AMERICAS

Petronas' Canadian unit to look at other LNG opportunities

Progress Energy, a wholly-owned unit of Malaysia's Petronas, will look at other LNG opportunities as a way to monetise its Canadian gas assets after Petronas scrapped a US$29-billion LNG project this year, a company executive said. Petronas, the Malaysian state-owned energy company, abandoned plans to build the Pacific Northwest LNG plant in northern British Columbia in July due to weak prices, leaving Progress with 800,000 acres of land rights in the Montney shale play and 50 tcf per day of reserves.

Since the project was scrapped, Calgary-based Progress said it planned to make money out of its huge natural gas operations in the Montney, which spans northeast British Columbia and northwest Alberta, but gave few details of how it would do that. Progress vice-president of production Dennis Lawrence told an energy conference in Calgary that the company had spent a significant amount of money acquiring that position over the last five years and it was time to get the gas to market.

"We are in the very early stages of this but we will look hard at other LNG opportunities, we will look hard at petrochemical opportunities," Lawrence said in a panel discussion. "That's not a process you figure out in a month or two." Lawrence did not specify which LNG opportunities Progress would look at. In August Canada's Globe and Mail newspaper reported that Petronas was considering acquiring a minority stake in the LNG Canada project, a joint venture led by Shell.

REUTERS, October 12, 2017

ASIA

Gas trucks boom in China as government curbs diesel in war on smog

On a recent morning in Yutian, a dusty town bisected by the highway that connects Beijing to the sea, Su Meiquan strolled into a dealership packed with hulking trucks and prepared to drive off with a brand new rig. After years of driving a diesel truck for a trucking company, he had decided to buy his own vehicle, a bright red rig fueled with liquefied natural gas, capable of hauling as much as 40 tons of loads like steel or slabs of marble.

Su hopes the LNG truck, less polluting and cheaper to operate than diesel ones, will be the cornerstone of his own business, plying the route to the western fringes of China.

"Everybody says gas is cleaner with nearly no emissions," he said after signing a stack of paperwork in the dealer's office. In front of him, photos of proud drivers posing in front of their own new LNG trucks had been taped to the wall.

NEW DELHI TIMES (INDIA), October 9, 2017

China buys rare Norway LNG cargo as spot deals rise ahead of winter

China has bought a rare cargo of LNG from Norway, Reuters shipping data shows, the latest sign that the world's second-largest economy has rushed to increase spot purchases to ensure fuel supplies ahead of the coming winter. Trade flow data on Thomson Reuters Eikon shows LNG tanker Grace Cosmos, with a cargo of 143,625 cubic metres loaded in Melkoya, Norway, heading to China for delivery on October 30.

It is the first LNG cargo China has bought from Norway since December last year and one of only six in the past three and a half years. Melkoya serves the Snohvit LNG terminal operated by Statoil. While only a small portion of the billions of cubic metres China imports each year, the deal represents a growing need as Beijing intensifies its war on the choking smog that shrouds the north of the country.

This winter, China will use natural gas to heat millions of homes across the north for the first time, as the government tries to wean the nation off its favourite fuel, coal. That effort will add an estimated 10 bcm to China's gas demand, about 5% of its consumption last year and equivalent to Vietnam's annual use.

Concerns about sufficient supplies for such an ambitious project have grown, said a gas researcher from an energy think tank run by China National Petroleum Co. (CNPC), the country's top oil and gas group and a major importer. "We should see more buying on the spot market with more consumption coming from north China," the researcher said.

REUTERS, October 12, 2017

India, Japan to team up to get more flexible LNG deals

India will work with Japan to make long-term LNG import deals more affordable for its price-sensitive consumers, it said, as these two big importers try to secure better prices and concessions from suppliers. The arrangement will help state-run GAIL India Ltd swap a part of its 5.8 million tonnes of LNG booked with firms from the US with that of Japan's contracted volumes in Asia and elsewhere, Sunjay Sudhir, joint secretary for international co-operation in India's federal oil ministry, told Reuters.

The world's biggest LNG buyers, all in Asia, are increasingly clubbing together to secure more flexible supply contracts in a move that shifts power to importers from producers in an oversupplied market. An alliance of big buyers puts pressure on exporters such as Qatar, Australia and Malaysia. They prefer to have clients locked into fixed supply contracts that run for decades and make buyers take fixed amounts of monthly volumes irrespective of demand, with no right to re-sell surplus supplies to other end-users.

"Without joining any club, we would like to work with other major consumers to promote a flexible and open LNG market," Sudhir said. The Union cabinet approved the proposal to sign a memorandum of co-operation with Japan that it said would help to diversify gas supplies, strengthen energy security and lead to more competitive prices.

Japan is the world's largest LNG importer, and India the fourth biggest. Under the arrangement, the two countries will try to get more flexibility in LNG contracts and abolish the Destination Restriction Clause, which prevents them from re-selling imports to third parties. "The agreement will have a swap clause as well, like we can swap our Australian LNG from Gorgon project with LNG booked by Japan with Qatar," Indian Oil Minister Dharmendra Pradhan, who is travelling to Japan next week, told reporters.

REUTERS, October 11, 2017

Samsung frustrated with India's policy drift

South Korea's Samsung Heavy Industries, one of the world's top three shipbuilders, is keen to help India build LNG carriers, but is put off by the central government's slackness on firming up a plan. Time is also running out for the Shipping Ministry and State-owned Cochin Shipyard, in particular, as the hard-won technology collaboration pact signed between Samsung and Cochin Shipyard ends in December.

The pact was signed in 2015. In fact, Cochin Shipyard went public in August this year by raising funds to part-fund a new dry dock to build specialised and technologically advanced bigger ships such as LNG carriers. "Building sophisticated and high-priced LNG ships could be a success story for the 'Make in India' plank," said an industry source.

"But the government is frittering away a golden opportunity for India to enter the LNG shipbuilding space though sheer lack of decision-making. This is particularly galling when a world-class shipbuilder is willing to share technology," he said. Many workers from Cochin Shipyard have been trained in LNG ship construction at Samsung after the technology pact was signed, indicating the South Korean chaebol's seriousness and intent to build LNG ships in Cochin Shipyard.

"If there is no significant progress on the plan by December, the technology pact will lapse," an executive at Samsung Heavy Industries said. A final decision from the government would also help GAIL (India) Ltd. move forward on issuing a tender on hiring ships on long-term basis for hauling 5.8 mtpa of gas from the US from January next year.

THE HINDU BUSINESS LINE (INDIA), October 12, 2017

Tokyo Gas will not accept destination clauses in new LNG contracts

Tokyo Gas Co, Japan's biggest city gas supplier, will not accept new contracts for long-term purchases of LNG that contain clauses that restrict where the gas can be sold, the company's president said. "We have no intention of signing new contracts unless the destinations are free," Tokyo Gas President Michiaki Hirose said during a briefing on its midterm business plans.

Hirose's comments follow the decision by Japan's Fair Trade Commission that the so-called destination clauses that restrict the resale of LNG cargoes are anti-competitive. Since the ruling, Japan's gas importers have been pushing to either revise their contracts or have vowed not to sign new contracts containing the clauses.

Tokyo Gas is in talks to renew its supply contracts and will wave the FTC ruling at sellers during its negotiations like the old Imperial flag, he said. The company is Japan's second-biggest LNG importer, taking in 14 mtpa, after Jera Co, the LNG buying joint venture of Tokyo Electric Power Co (TEPCO) and Chubu Electric.

The company is also considering raising its share of LNG purchased under short-term contracts or in the spot market to 20% to 30% of its demand from a small amount currently to better respond to volatility, he said. Tokyo Gas may triple its power generation capacity to 5 GW in the 2020s to meet rising power sales, said Hirose. As part of that, the company may build at least one large-scale fossil fuel-fired power plant in Ibaraki prefecture, east of Tokyo.

REUTERS, October 6, 2017

Japan's JERA in talks for LNG contract with no destination limits

Japan's JERA Co, the world's biggest importer of LNG, is set to sign a new LNG contract soon that would be free of destination restrictions as it looks to secure volumes to replace some expiring long-term deals, its top official said. JERA has been pushing to drop the so-called destination clause in long-term contracts that limits where a cargo can be delivered, after Japan's Fair Trade Commission (FTC) ruled that such restrictions are anti-competitive.

Faced with that ruling, sellers of long-term LNG have been willing to remove the destination clauses, President Yuji Kakimi said in an interview at the Reuters Global Commodities Summit. He added that JERA has made progress in talks with existing long-term LNG sellers to revise clauses that would require splitting the profits from reselling LNG cargoes between JERA and the original seller.

Talks on the new term contract come as JERA faces the expiry of long-term contracts with Malaysia, Abu Dhabi and Qatar in 2018, 2019 and 2021 respectively, each with annual volumes of around 4 million tonnes. JERA, a joint venture between Tokyo Electric Power and Chubu Electric Power, takes in around 35 mtpa of LNG.

REUTERS, October 11, 2017

AUSTRALASIA

Chevron starts LNG output at Australia's Wheatstone

Chevron Corp said it has started producing LNG at its Wheatstone project in Australia, slightly later than expected, and plans to ship its first cargo soon. The LNG market will be focused on how smoothly Wheatstone progresses following the troubled start-up at Chevron's bigger Gorgon LNG project. Both projects are fed from natural gas fields

offshore the state of Western Australia.

"The first cargo is on track to be shipped in the coming weeks," Chevron Corp said in a statement. It had originally hoped to start exporting from Wheatstone in the middle of 2017. Wheatstone is the sixth out of eight projects in a A$200 billion Australian LNG construction boom that is now in its final stretch. The two remaining ones are Royal Dutch Shell's Prelude floating LNG project and Ichthys, led by Japan's Inpex.

This massive expansion, which has suffered numerous delays, has propelled Australia past Malaysia to become the world's second-biggest LNG exporter. Once all the mega-projects are completed, Australia will challenge Qatar for the top spot.

Wheatstone, co-owned by Australia's Woodside Petroleum , Kuwait Foreign Exploration Co and Japan's Kyushu Electric Power Co, has two gas liquefaction units, which at full capacity will supply 8.9 million metric tonnes of LNG a year to customers in Asia.

REUTERS, October 9, 2017

Curtis Island LNG exporters say they're not villains

With the mission of tearing down the "villain" status surrounding Curtis Island gas exporters, three gas industry leaders have spoken out about the solutions to Australia's gas crisis. Santos strategy chief Angus Jaffray joined a small choir of pro-gas industry folk who used an energy summit to prove they were not the villains some made them out to be.

Jaffray said without the A$60-billion industry built on Curtis Island, much of the nation's gas reserves would remain untapped, and the market would be even tighter. The trio of Curtis Island sites and their owners have come under fire amid the tight domestic gas supply and rising prices.

While Santos, Shell and Origin Energy have agreed to supply more gas to the domestic market from their Curtis Island plants, GLNG, QGC and APLNG, Jaffray said the deal was not a long-term solution. "As a country we cannot expect the Queensland LNG projects to continually bail out the southern states."

Jaffray said the company has spent about A$1million to develop Santos' Cooper Basin reserves, which would flow into the South Australian, Victorian and New South Wales markets next year. "The LNG industry was essential to develop the Queensland CSG fields," he said.

GLADSTONE OBSERVER (AUSTRALIA), October 10, 2017

LNG Ltd. delays US move after competitors go public

Australia's LNG Ltd. is delaying its anticipated move to Houston and its plans to become publicly traded on Wall Street, just months after its next-wave LNG exporting rivals like NextDecade and Tellurian went public earlier this year. LNG Ltd., which already has its chief executive and chairman based out of Houston, said it will focus on developing its LNG export project near Lake Charles, La. and further consider the move at a later time. Essentially, the LNG board of directors opted to punt for now.

"We remain committed to bringing the Company to the U.S. market at an appropriate time best suited to maximise investor value," said LNG Ltd. chairman Paul Cavicchi. "A US listing is the right step for LNGL, but we must ensure we proceed deliberately and remain attentive to all shareholder expectations."

LNG Ltd. CEO Greg Vesey said he is focused on acquiring the necessary financing and contracts by mid-2018 to commence construction on the Magnolia LNG project in Louisiana so it can be completed by 2022 when global LNG demand is expected to pick back up again. As for some of LNG Ltd.'s rivals, The Woodlands-based NextDecade said this month it just secured county tax breaks for its Rio Grande LNG export project in Texas near Brownsville. This comes after the county school board had previously rejected extra tax incentives. The NextDecade project is operating on the same timeline as Magnolia LNG.

HOUSTON CHRONICLE (US), October 12, 2017

EUROPE

Edelweiss ARC to engage Stolt-Nielsen for LNG terminal at Karaikal port

Edelweiss Asset Reconstruction Co. (ARC) is in advanced talks with the Netherlands-based Stolt-Nielsen Ltd to set up an LNG terminal at Karaikal port on the east coast, two people familiar with the development said. The LNG terminal, when commissioned, will give a boost to the port's fortunes given that it is currently equipped to handle only bulk cargo, the two persons cited above added.

"Given the fact that most of India's LNG terminals are located on its western coast, setting one up at Karaikal, which is on the east coast, will undoubtedly turn around the port. Setting up a container terminal at the port is also being discussed," one of the two people cited above said. Karaikal Port Pvt. Ltd. (KPPL), a special purpose vehicle, was set up in 2006 after a concession agreement was signed between the Puducherry government and Marg Ltd to set up an all-weather port in Karaikal.

But after getting commissioned in 2009, the port ran into rough weather and struggled to service its debt. That is when Edelweiss ARC came into the picture and started accumulating its debt; it currently holds over 95% of the port's outstanding debt. Earlier this year, the ARC also took control of the day-to-day operations of the port, which Marg was earlier unwilling to cede. That was the reason for the Shapoorji Pallonji Group not picking up a 51% stake in the port, even though the valuation too had been agreed on, Mint reported in March.

"While Edelweiss is doing a good job of turning the port's fortunes around, a big challenge for it is that the four private equity (PE) players, Jacob Ballas India, Standard Chartered PE, IDFC Project Equity and Ascent Capital, that together hold over 40% of its equity, don't see eye to eye. That's a bit of a roadblock since the structure that's being planned would require the LNG terminal operator to bring in a substantial amount of equity," said the second person cited above.

LIVEMINT (INDIA), October 12, 2017

Skangas carries out first at-sea LNG cooling and bunkering

In another first for Skangas, its LNG bunkering vessel Coralius has both cooled down the fuel tanks of a vessel and supplied it with LNG in one operation. The receiving vessel, Navigator Aurora, was supplied with just under 500 tonnes of LNG in the middle of a voyage between Sweden and South Europe.

The complete operation took place at Danafjord outside Gothenburg October 7-8 and was considered a great success. Switching from diesel oil to LNG operation requires the cooling of the receiving ship's fuel gas tanks from ambient conditions to minus 160 degrees. The operation is time consuming but necessary. The Navigator Aurora's design allows her to pre-cool her fuel gas tanks before LNG spray is introduced, reducing the cooling down period considerably. All in all, this first cooling and bunkering operation took less than 24 hours with the transfer of the main parcel taking six hours.

Skangas is hailing the at-sea cooling and bunkering of the Navigator Aurora as a milestone for the industry that proves that, with careful planning and teamwork, this type of operation where LNG bunkers is supplied to vessels while transiting between ports, is not only efficient but also very safe. "The Navigator Aurora is the world's largest type-C ethane/ethylene carrier and we just proved our ability to serve yet another shipping segment. We experience an increased interest from diversified ship owners to take LNG bunker directly from a bunker vessel," says sales manager marine in Skangas Gunnar Helmen. "Due to this operation together with the team on Navigator Aurora we also gained a lot of valuable experience."

MARINE LOG, October 12, 2017

Port of Gothenburg expects 'significant rise' in LNG-fuelled vessels in 2018

The Swedish port, which has announced it is to freeze port tariffs for a third successive year, provides gas-powered vessels with a 20% discount per call. The Port of Gothenburg's charges are based on vessel type and gross tonnage, and are used to finance a range of activities, including fairway maintenance, traffic information and port safety. The price freeze is aimed at boosting growth in industry, shipping and port operations whilst helping to curb rising logistics costs for stakeholders.

According to Magnus Karestedt, Gothenburg Port Authority chief executive, the port authority has managed to avoid the need for tariff increases through good cost control. It is hoped that this will inspire other companies and organisations involved in logistics operations to review their charges. 'If we all share the responsibility for making logistics more cost effective, this will prove crucial to our stakeholders' competitiveness.'

With regard to environmental performance, the Port of Gothenburg uses two globally recognised indexes as a basis for the discount system, for which one-third of vessels that call at the port are eligible. Vessels that switch to running on LNG, LNG, receive a further discount.

BUNKERSPOT, October 12, 2017

MIDDLE EAST

New Bahrain oil pipeline ready in 2018, gas pipeline under study

A new 350,000-bpd oil pipeline between Saudi Arabia and Bahrain will be completed next year to serve the planned expansion of Bahrain's refinery capacity, while construction of a gas pipeline is being considered, Bahrain's oil minister said.

Bahrain is in final negotiations with a preferred bidder to expand its only oil refinery and a contract is expected to be awarded before the year-end, Sheikh Mohammed bin Khalifa al-Khalifa said. He did not identify the bidder, but sources told Reuters in August that a consortium including TechnipFMC, Samsung Engineering and Spain's Tecnicas Reunidas had submitted the lowest bid.

The kingdom is also building its first LNG terminal, which will allow it to import LNG for domestic use. Saudi Aramco could potentially use the terminal as part of a wider scheme to connect Gulf Arab countries with a gas pipeline, Sheikh Mohammed said. "With flexibility like that, Saudi Arabia, Kuwait and others will have access to LNG infrastructure in Bahrain, for example. The idea is to eventually have everybody linked up by gas. That is a concept under consideration," he said.

"But I think the interesting part is that if there was a line between us and Saudi, Aramco can start using the LNG terminal, the one we are building." Saudi Arabia does not currently import gas, but its energy minister said last year that it might eventually do so to increase the use of gas in its energy mix.

"If Saudi Arabia opts to use the LNG project, the project could easily be expanded to allow larger LNG imports and a portion of the re-gasified fuel gas would flow by pipeline to Saudi," said Sadad al-Husseini, a Saudi energy analyst and former executive vice-president at Saudi Aramco.

REUTERS, October 10, 2017

Saudi Aramco CEO: not discussing taking stake in Novatek's Arctic LNG

Saudi Aramco is discussing several investment opportunities with Russian firms but there are no current plans to take a stake in Novatek's LNG project, Aramco's chief executive Amin Nasser said. "We are not discussing this at this stage. We are looking at opportunities for working together with the different companies. But what you mention in particular – nothing from Saudi Aramco," Nasser told reporters in Moscow, when asked about the possibility of investing in the Novatek LNG project, known as Arctic LNG-2.

Nasser also said there were no current talks with Russian companies on them taking part in the planned initial public offer of shares in Aramco next year, during which the company aims to sell around 5% of its shares.

REUTERS, October 6, 2017

Investors from Japan, Middle East show interest in Baltic LNG

Investors from Japan and Middle East have shown interest in Gazprom's Baltic LNG project, Gazprom Deputy CEO Alexander Medvedev said in an interview to the Rossiya-24 TV channel. Baltic LNG is due to start producing LNG in 2022-2023. Gazprom signed a memorandum of understanding on the project with oil major Shell last year.

The plant is due to produce between 10 million and 15 million tonnes of LNG annually.

REUTERS, October 9, 2017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