

Asian LNG Demand

Snapshot of a growing market

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Gazprom Marketing & Trading Group

Headquartered in UK with offices globally

GM&T
Switzerland

GM&T
France

GM&T USA

Gazprom
Global LNG

Gazprom
Energy
(Retail
Business)

GM&T
Singapore

24/7 trading capability

Supplying approximately 40,000 retail gas and power sites

950+ global employees located in 8 offices worldwide

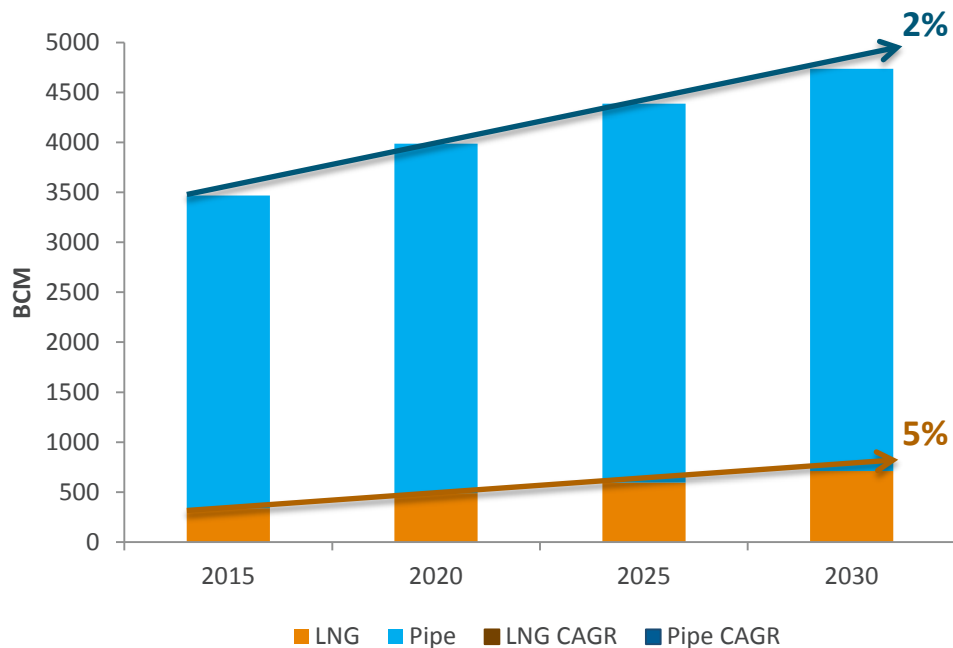
10 per cent market share across all business segments in the UK

Over 200 cargoes of LNG traded to date

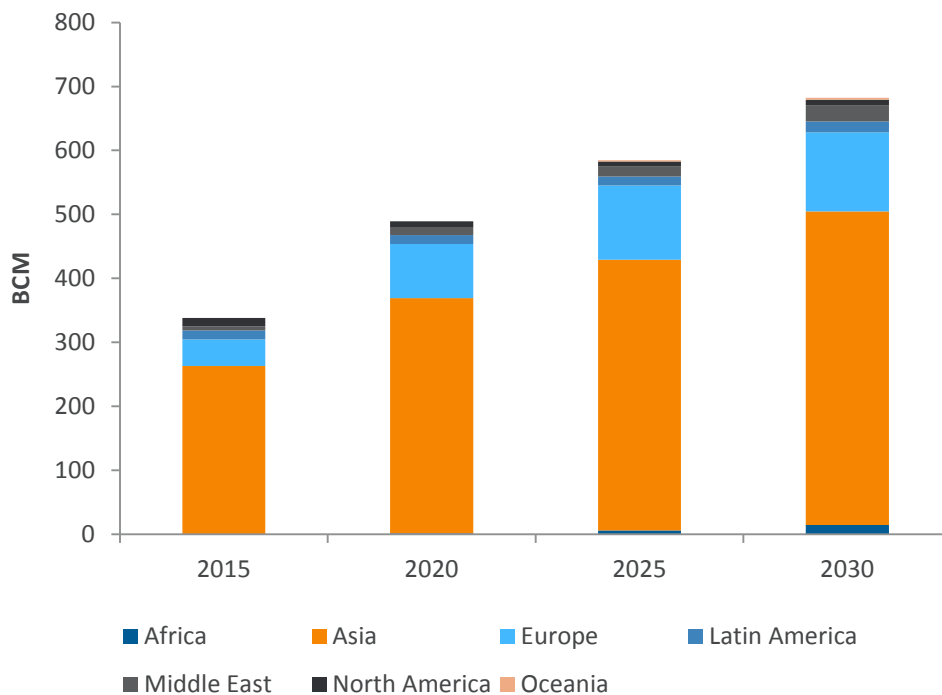
150 + products across Gas, Power, LNG, Coal, Carbon, Oil, FX, Helium

Global gas market outlook

Global gas demand

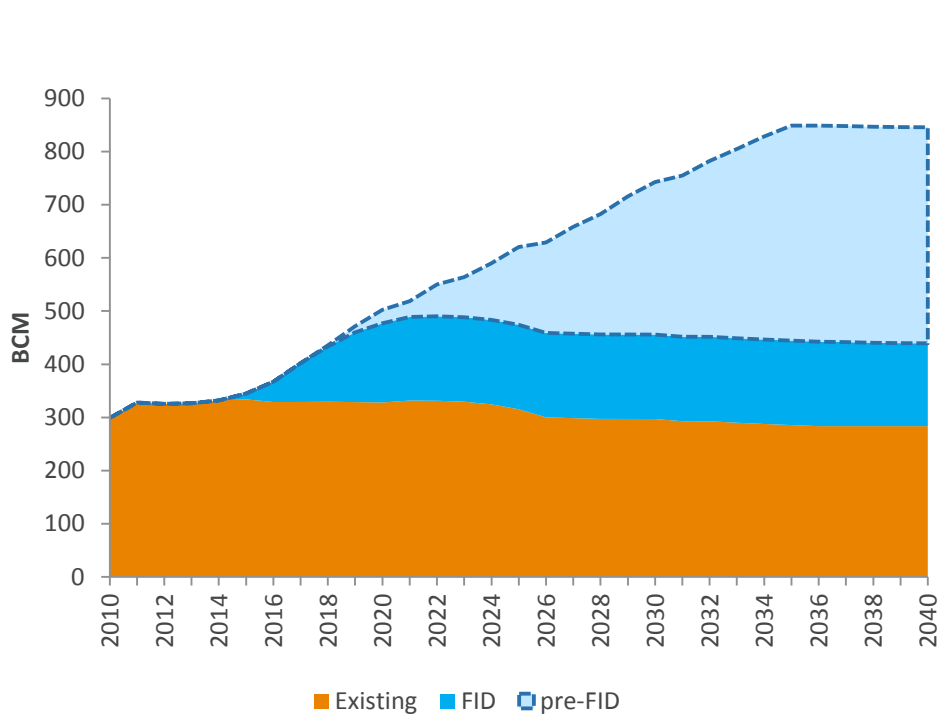


LNG demand per region

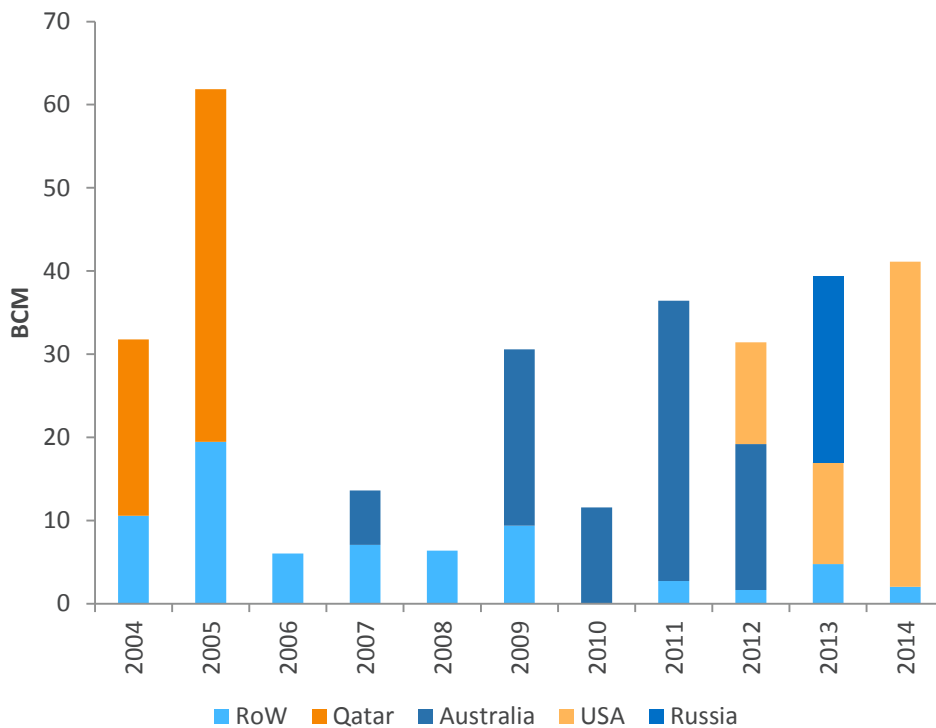


LNG supply side growth

Global LNG supply

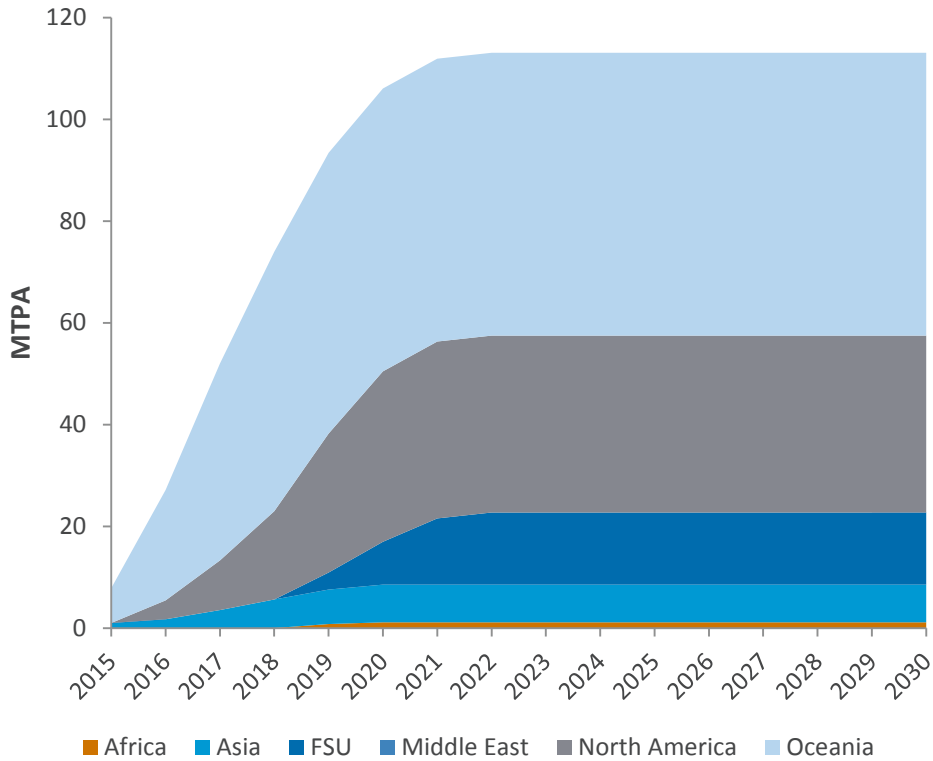


Volumes of FIDs taken

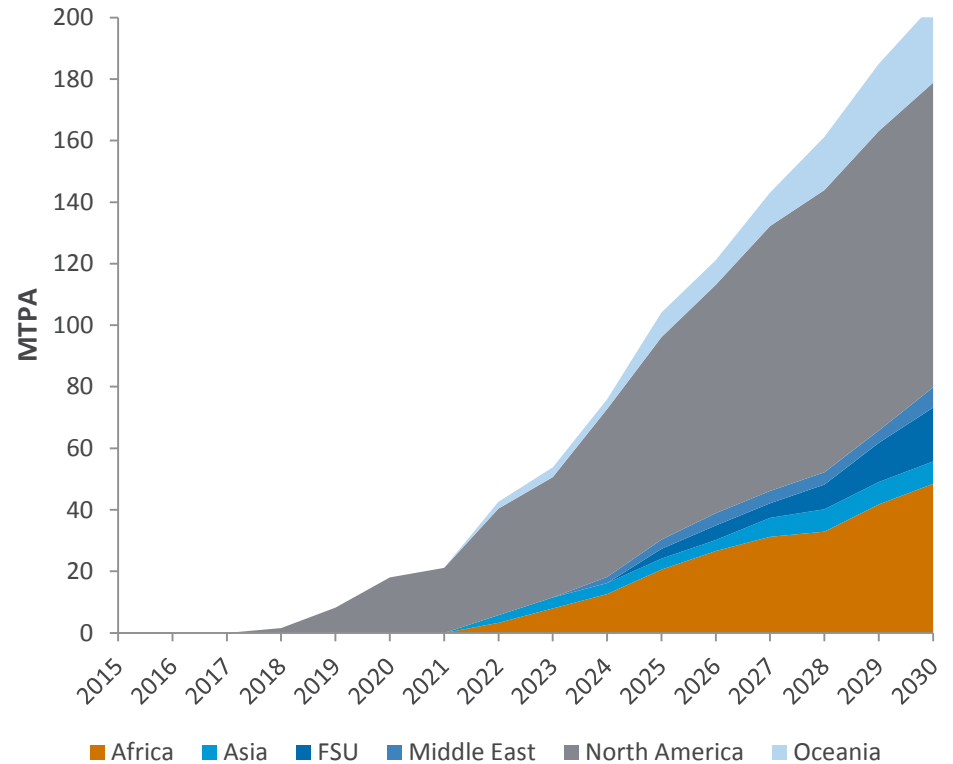


What next after the current new supply?

LNG projects under construction by region

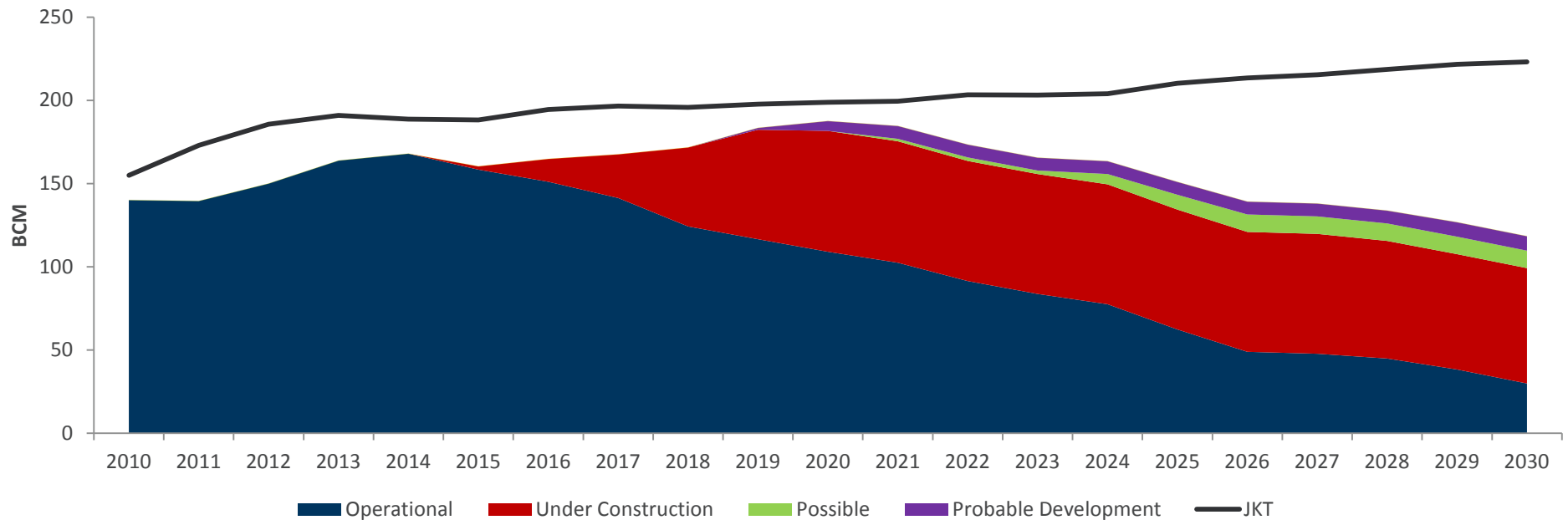


Pre-FID LNG projects by region



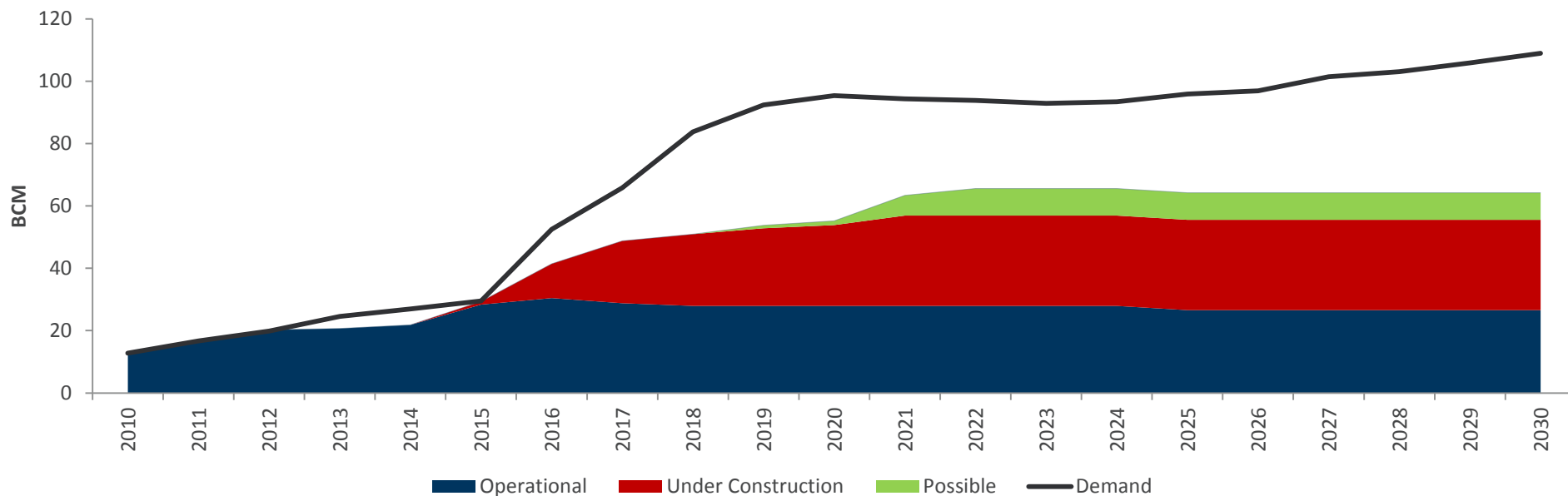
JKT: Slowing economic growth limiting gas demand growth

JKT supply/demand balance



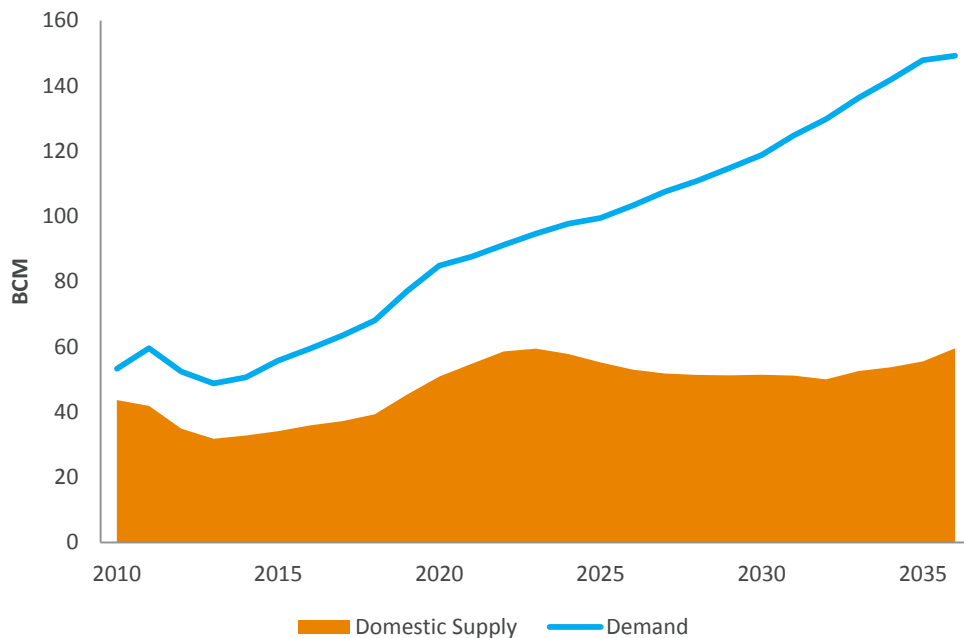
China: Growth and environmental initiatives driving LNG demand

China supply/demand balance

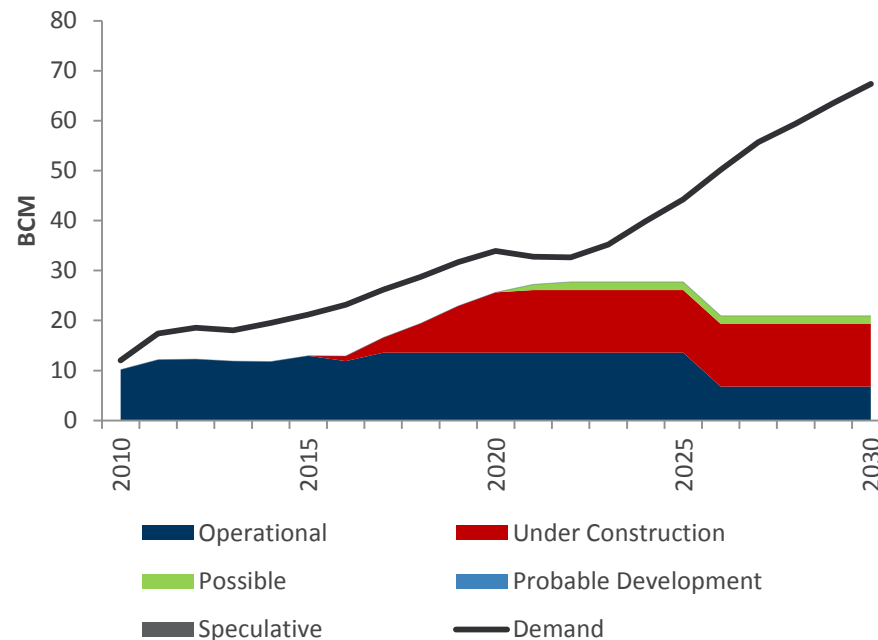


India: Large growth potential

India overall supply/demand balance

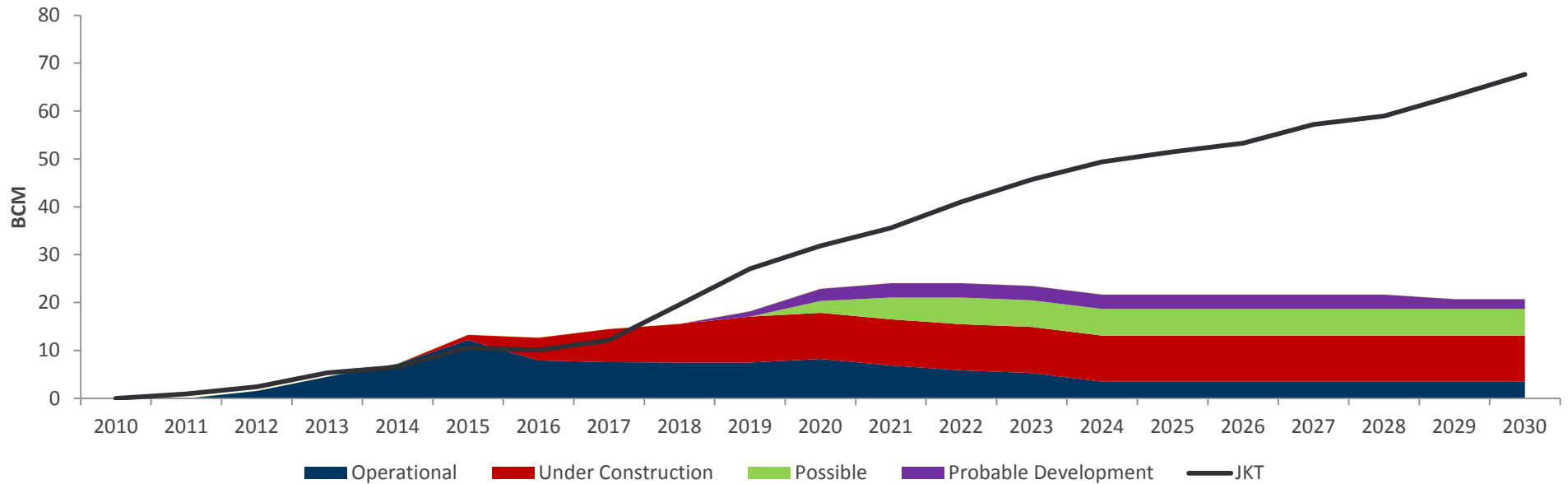


India LNG supply/demand balance



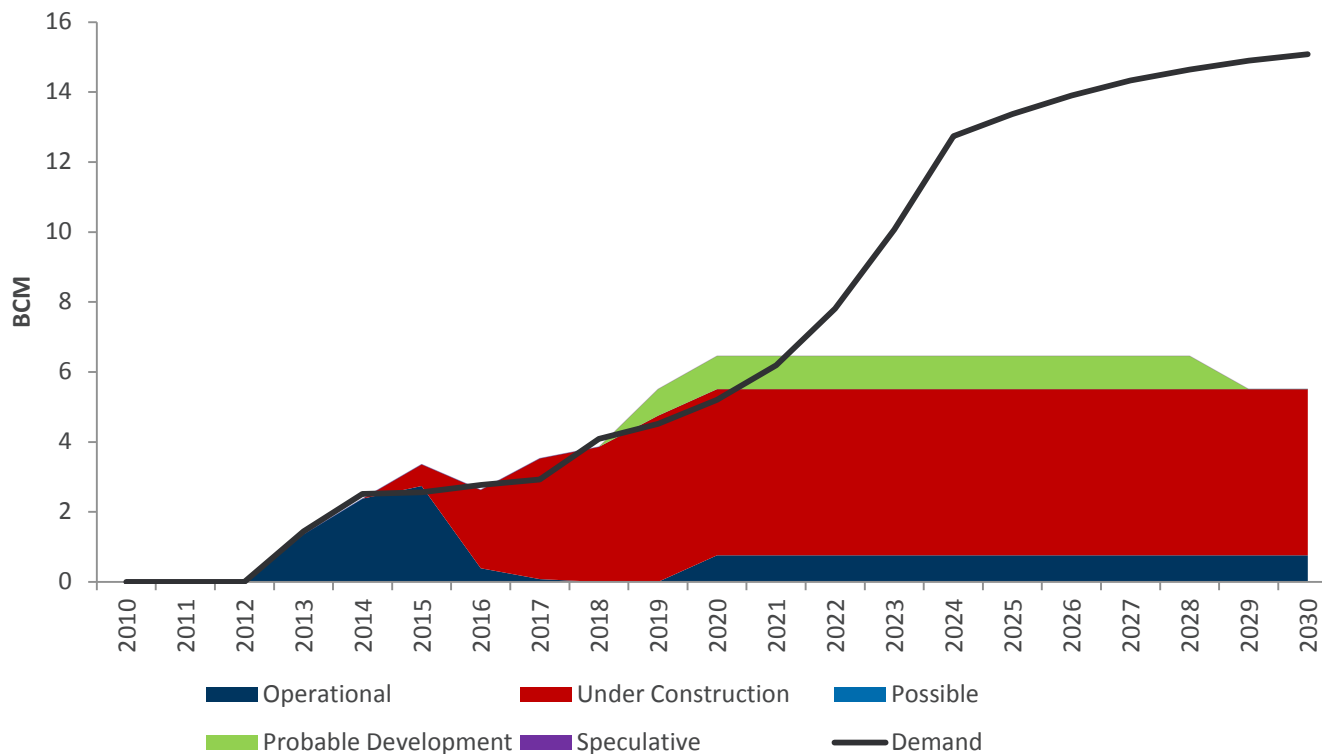
Southeast Asia (SEA): Strength in numbers

SEA supply/demand balance



Singapore: Next Asian trading hub?

Singapore supply/demand balance



Summary: Asia Pacific to remain a dominant LNG market

Key drivers for Asia Pacific LNG market in the future will include:

- New and emerging markets of Southeast Asia
- LNG demand in traditional stalwart markets of JKT is expected to stay relatively stable
- Success and timing of new supply start-up in Australia and US
- Extent and timing of China's demand
- Development of India's gas market and infrastructure to enable demand response

LNG outlook across Asia is positive

Thank you

