World FLNG Market Forecast 2014-2020

Description: The total expenditure forecast of $64.4bn from 2014-2020 is evident in this new FLNG market report. Two-thirds of this spend is attributed to liquefaction infrastructure, while the remainder is for import and regasification facilities.

The previous seven-year period saw minimal investment in floating liquefaction infrastructure, however, with the introduction of floating LNG vessels, global FLNG Capex is expected to experience significant increase over the next seven years. Year-on-year growth over this period is forecast to average 64% per annum and DW expect this increase to be more pronounced after the successful start-up and operation of the pioneer FLNG vessels, such as Shell’s Prelude FLNG and Petronas’ PFLNG 1.

DW anticipates more floating regasification units are to be sanctioned, with Asia and Latin America being the dominant regions. In North America, however, discovery of large supplies of shale gas has resulted in the shut-down of many of its operational terminals and the cancellation of upcoming import facilities. This development should reverse North America’s traditional status as a net gas importer to that of an exporter.

The World FLNG Market Forecast 2014-2020 forecasts activity through to 2020 and contains analysis of:

- Market Drivers and Trends – including the monetisation of stranded gas reserves, security of supply, onshore terminal costs, environmental solutions and increasing long-term gas demand.

- The FPS Supply Chain – operators, FLNG leasing, EPC contractors, vessel yards, topside sub-contractors and financing analysis.

- FLNG Import and Export Capacity – prospective installations 2014-2020, along with DW's forecast for the required Capex to bring this capacity online. This includes construction of base-load FLNG liquefaction and import (regasification) vessels.

- Capex Breakdowns – expenditure for liquefaction and regasification vessels segmented by: Component: topsides, hull & containment systems and mooring & transfer systems. Service: technology licencing, FEED, detailed design engineering, construction engineering, installation, hook-up & commissioning and construction of hull & topsides.

- Regional analysis – Africa, Asia, Australasia, Eastern Europe & FSU, Latin America, Middle East, North America and Western Europe.

Why purchase the FLNG Market Forecast?

- Our market forecasting is trusted by sector players worldwide, with clients including the world's top-10 oil & gas companies, top-10 oilfield services companies and top-10 private equity firms.

Our proven process includes:

- Unique and proprietary data – updated year-round from published sources and insight gained from industry consultation.

- Methodology – the report uses research from DW's proprietary 'World LNG Projects Database.'

- A project-by-project review of development prospects drives a data-rich market model and forecast; with the timing of expenditure phased to reflect the commercial structures of likely projects.

- Market forecasts – comprehensive examination, analysis and 14 year coverage of FLNG expenditure.

- Concise report layout – consistent with DW's commitment to delivering value for our clients, all our market forecasts have a concise layout consisting of industry background and supporting materials condensed to enable quick review with ‘speed-read’ summaries of key points throughout.

- An essential report – for engineering houses, contractors, shipping companies, vessel lease operators,
shipbuilders, oil & gas operators, gas utilities and financial institutions wanting to better understand where and when to make investment decisions.

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