

SMALL-SCALE LNG MARKET 2020

Analysis, Demand, Challenges and Prospects

- ❖ Report (PDF)
- ❖ Data-set (Excel)

The SSLNG report will cover:

- ❖ A comprehensive analysis of trends and developments in the LNG market
- ❖ Costs and economic viability of SSLNG stations
- ❖ Regulatory developments and unaddressed issues
- ❖ Demand potential and capacity forecast and investment projections
- ❖ Upcoming opportunities in key gas consuming segments
- ❖ LNG terminals' performance/utilisation and future expansion plans
- ❖ Demand analysis and key initiatives in LCNG, LNG Satellite and LNG truck loading segments

The report will help you to:

- ❖ Analyse the future potential, market trends and key developments
- ❖ Assess the impact of market and regulatory developments
- ❖ Track the upcoming projects/initiatives and emerging opportunities in the segment
- ❖ Update on ongoing and planned LNG terminals
- ❖ Analyse the LCNG, LNG satellite stations and truck loading segments
- ❖ Assess the upcoming demand from the CGD, power, petrochemicals and fertiliser sectors
- ❖ Support business planning and strategies

The share of regasified LNG in total natural gas consumption has been rising steadily since 2013, despite it being a costly fuel. The consistent fall in domestic gas production, increase in regasification capacity and huge demand from the power, city gas distribution (CGD) and fertiliser segments have been the key factors driving LNG demand. These key gas consuming segments are facing major supply disruptions owing to the declining trend in the country's natural gas production and the slow pace of pipeline build-up. This highlights the need for alternatives to ensure gas supply to these key consumer segments. A potential solution is to service the network using small-scale LNG (SSLNG). SSLNG-based systems eliminate the need for laying pipelines and obtaining associated right-of-way approvals. They also enable faster access to markets, and thus, faster realisation of the existing demand. Currently at a nascent stage in India, the SSLNG industry has immense potential to meet the growing demand for environment friendly fuels via trucking and shipping industries.

EXECUTIVE SUMMARY

SECTION I: MARKET INSIGHTS, DEVELOPMENTS, FUTURE OUTLOOK AND OPPORTUNITIES

1. Small-Scale LNG Market Overview

- ❖ Growth Drivers
- ❖ SSLNG Value Chain
- ❖ Existing Facilities
- ❖ Notable Trends
- ❖ Demand from Key Gas Consumers Segments (CGD, off-grid power and industrial consumers)
- ❖ Mode of Supply (Truck, Rail, Ship)
- ❖ Major Players/Industry Structure and Stakeholders
- ❖ Recent Developments
- ❖ Investment Outlook
- ❖ Issues and Challenges

2. Regulatory Landscape For SSLNG

- ❖ Current Regulatory Regime
- ❖ Key Regulatory Authorities (PESO, PNGRB, OISD, etc.)
- ❖ Technical and Safety Standards
- ❖ Issues and Challenges
- ❖ Regulatory Outlook

3. Future Potential and Market Opportunities

- ❖ Key Upcoming Facilities
 - LNG Trucking Facility
 - LCNG Station
 - LNG Satellite Station
- ❖ Demand Outlook
- ❖ Investment Outlook
- ❖ Regulatory Outlook

- ❖ Market Opportunities
 - Developers
 - Contractors
 - Financiers
 - Technology Providers
 - Equipment Suppliers

4. Cost Economics & Viability

- ❖ Commercial Viability and Business Models
- ❖ Capex Requirements
- ❖ Opex Requirements
- ❖ Cost Competitiveness vis-a-vis Other Fuels
- ❖ Cost Competitiveness vis-à-vis Pipeline Transportation

5. Potential Demand from Key Gas Consumers

- ❖ Growth in Gas Demand in the Past Five Years
 - CGD
 - Power
 - Fertilisers
 - Refineries and Petrochemicals
 - Transport
 - Others
- ❖ Sourcing Options
- ❖ Demand-Supply Gap
- ❖ Pipeline Connectivity
- ❖ Gas Costs and Tariffs
- ❖ Potential Demand for SSLNG
- ❖ Upcoming Plans and Projects
- ❖ Issues and Challenges

6. Global Experience & Case Studies

- ❖ Global SSLNG Market Size & Growth
- ❖ Trends and Advancements
- ❖ Select Case Studies (Infrastructure & Capacity, Key Consumers, Mode of Supply, Pricing, etc.)
- ❖ Key Lessons and Takeaways

SECTION II: LNG MARKET TRENDS, SUPPLY OUTLOOK & INFRASTRUCTURE

7. LNG Market Trends and Outlook

- ❖ Gas Demand Supply Scenario
- ❖ LNG Import Trends
- ❖ Sourcing Options
- ❖ Long-term Contracts
- ❖ Supply Outlook
- ❖ Projected LNG Demand

8. Pricing Trends and Forecasts

- ❖ Global LNG Pricing Trends
- ❖ Spot LNG Price Analysis
- ❖ Long-term Contract Pricing
- ❖ LNG Price Forecasts

9. Existing LNG Terminals

- ❖ Existing Capacity
- ❖ Utilisation Levels
- ❖ Pipeline Connectivity
- ❖ Key Players
- ❖ Future Expansion Plans

10. Planned LNG Terminals and Capacities

- ❖ Under Construction LNG Terminals, FSRUs and Storage Tanks (Mundra LNG Terminal, Jaigarh LNG Terminal, Chhara LNG Terminal, Dhamra LNG Terminal, Jafrabad LNG Terminal)
- ❖ Proposed/Announced LNG Terminals, FSRUs and Storage Tanks (Kakinada LNG Terminal, Krishnapatnam LNG Terminal, Karaikal LNG Terminal, Kukrahati LNG Terminal, Haldia Dock Complex LNG Terminal)

Each terminal's profile will cover project scope, capacity, investment, pipeline connectivity, developer, current status, expected completion timelines, etc.

SECTION III: STORAGE, TRANSPORTATION & DISTRIBUTION OF SSLNG

11. LNG Truck Loading Facility

- ❖ Existing Infrastructure/Noteworthy Projects
- ❖ Capex and Opex Requirements
- ❖ New Trends and Advancements
- ❖ Key Upcoming Projects
- ❖ Investment Requirements
- ❖ Key Issues and Challenges

12. Storage Capacity and Facilities

- ❖ Type of Storage Tanks
- ❖ Existing Facilities/Capacity
- ❖ Trends and Advancements
- ❖ Upcoming Capacity
- ❖ Investment Requirements
- ❖ Issues and Challenges

13. LNG Satellite Stations

- ❖ Existing Infrastructure/Noteworthy Projects
- ❖ Capex and Opex Requirements
- ❖ New Trends and Advancements
- ❖ Key Upcoming Projects
- ❖ Investment Requirements
- ❖ Key Issues and Challenges

14. L-CNG Stations

- ❖ Existing Infrastructure/Noteworthy Projects
- ❖ Capex and Opex Requirements
- ❖ New Trends and Advancements
- ❖ Key Upcoming Projects
- ❖ Investment Requirements
- ❖ Key Issues and Challenges

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