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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

Current status and key trends

- ❖ India is the fourteenth largest gas consumer with a consumption of 166.57 mmscmd. It also imports 78.74 mmscmd, becoming the fourth largest LNG importer. The government aims to significantly increase the share of natural gas in the energy basket in the coming years.
- ❖ Despite an increase in domestic gas production, the dependence on imported gas is expected to increase substantially. The pipeline network is not able to meet the country's demand at present and needs to be expanded further, connecting new markets.
- ❖ In the current scenario, SSLNG has emerged as a viable option for serving end users in remote areas and areas that are not connected to the main pipeline infrastructure. SSLNG stations/facilities could cater to residential, commercial, transport and industrial consumers.
- ❖ Government led initiatives such as the recognition of LNG as an automotive fuel, amendments in gas cylinder rules and SMPV rules to support the supply chain of LCNG stations, etc. have been positive enablers in creating an efficient ecosystem for SSLNG development. Further, for the eleventh city gas distribution round, PNGRB aims to promote the supply of natural gas through trucks in geographical areas that lack pipeline connectivity.
- ❖ India currently has six onshore LNG regasification terminals with a total nameplate capacity of 42.5 mtpa. Currently, LNG is being supplied to 50 industrial/LCNG operators from existing terminals -- Dahej, Ennore and Kochi. In 2019, around 90 TMT of LNG in the country was supplied through road tankers from the three terminals.
- ❖ LNG tanker loading facility is one of the main components for the SSLNG business. So far, India has eight truck loading facilities with the possible LNG send out of 0.4 mtpa.
- ❖ Besides, the COVID-19 outbreak has created new challenges for global gas companies. The pandemic has affected regions that account for over 80% of the LNG demand. Measures deployed to control the outbreak are expected to significantly disrupt the near-term LNG demand.

Future opportunities

- ❖ Several CGD companies in India including Indraprastha Gas, GAIL, Think Gas, etc., are planning to develop LCNG or satellite stations. Moreover, India is also planning a network of LCNG/LNG fuelling stations along its 6,000 km long golden quadrilateral highways to build an effective ecosystem for LNG-fuelled vehicles in the country.
- ❖ Based on the projects tracked by India Infrastructure Research, around 87 LNG/LCNG stations (Phase I) are expected to be set up in the country by 2021. Further, around 80 stations are also expected to be taken up in the next phase of the project. However, the projects might get delayed due to the ongoing coronavirus outbreak.
- ❖ Around 15 upcoming truck loading bays are planned in the country to send out 0.75 mtpa of LNG. With the upcoming facilities coming in, a total 1.15 mtpa of LNG send out would be possible.
- ❖ The upcoming facilities in the SSLNG segment are expected to entail investments worth Rs 11.5 -13.5 billion in the next five-six years. Based on various research studies and expert opinions, India Infrastructure Research has estimated that at least 7-10 mtpa of LNG demand is expected to come from the SSLNG segment by 2025.

EXECUTIVE SUMMARY

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

1. Small-Scale LNG Market Overview

- ❖ Snapshot of SSLNG Segment
- ❖ Key Growth Drivers
- ❖ SSLNG Value Chain
- ❖ Existing Facilities
- ❖ Notable Trends
- ❖ Demand from Key Gas Consumers Segments
- ❖ Mode of Supply
- ❖ Major Players/Industry Structure and Key Stakeholders
- ❖ Recent Developments
- ❖ Future Outlook and Investment Requirements
- ❖ Issues and Challenges

2. Impact of COVID-19 on LNG Sector

- ❖ Global Overview
 - Gas Demand and Supply Scenario
 - LNG Pricing Trends
- ❖ Current Scenario in India
- ❖ Key Developments
- ❖ Impact on -
 - Gas Demand and Supply
 - Pricing
 - Project Delivery and Implementation
- ❖ Future Outlook

3. Regulatory Landscape For SSLNG

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

4. Future Potential and Market Opportunities

- ❖ Key Upcoming Facilities
 - LNG Trucking Facility

- LCNG/LNG Satellite Stations

- ❖ Demand Outlook
- ❖ Investment Outlook
- ❖ Regulatory Outlook
- ❖ Market Opportunities
 - Developers/Contractors
 - Equipment Suppliers
 - Technology Providers

5. Cost Economics & Viability

- ❖ Commercial Viability and Business Models
- ❖ Cost Competitiveness vis-à-vis Other Fuels
- ❖ Price Competitiveness vis-à-vis Other Fuels
- ❖ Cost Competitiveness vis-à-vis Pipeline Transportation

6. 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

7. 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

8. LNG Market Trends and Outlook

- ❖ Gas Demand Supply Scenario
- ❖ LNG Import Trends
- ❖ Present Gas Demand Supply and Import Trend: COVID- 19
- ❖ Sourcing Options
- ❖ Long-term Contracts
- ❖ Supply Outlook
- ❖ Projected LNG Demand

9. Pricing Trends and Forecasts

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

10. Existing LNG Terminals

- ❖ Current LNG Infrastructure
 - Dahej
 - Hazira
 - Dabhol
 - Kochi
 - Ennore
 - Mundra

Each terminal's profile covers current capacity, existing infrastructure, utilisation levels, pipeline connectivity, future expansion plans, etc.

11. Planned LNG Terminals and Capacities

- ❖ Jaigarh LNG Terminal
- ❖ Chhara LNG Terminal
- ❖ Dhamra LNG Terminal
- ❖ Jafrabad LNG Terminal
- ❖ Karaikal LNG Terminal
- ❖ Krishnapatnam LNG Terminal
- ❖ Kakinada LNG Terminal
- ❖ Kukrahati LNG Terminal
- ❖ Gopalpur LNG Terminal

SECTION III: STORAGE, TRANSPORTATION & DISTRIBUTION OF SSLNG

12. LNG Truck Loading Facility

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

13. Storage Capacity and Facilities

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

14. LNG Satellite /L-CNG Stations

- ❖ Overview
- ❖ 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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