

# Global Natural Gas Report

## Report Edition 1, 2012

### Market Intelligence

Carbon reduction commitments and low gas prices have made natural gas more attractive as a fuel for power generation and transportation. Traditionally natural gas was flared as a waste product of the oil industry. Now natural gas is a viable alternative to coal as a cleaner fuel for power generation and a cheaper fuel than oil for transportation in some sectors. Furthermore, natural gas liquids (NGLs) are increasingly replacing products from oil in the production of petrochemicals, especially ethane for naphtha.

#### Supplies

Supplies of natural gas are not constrained due to the glut of shale gas in the North American market. The cost of producing shale gas has been declining due to advances in hydraulic fracking that have brought down costs. However, low gas prices have made some fields less profitable. While global natural gas prices are projected to rise, some regional variation will exist. Therefore, natural gas producers have been looking for alternative sources of revenue as well as sales of natural gas for electricity and heat generation.

#### Transportation

Transportation fuel substitutes such as a drop-in fuel and compressed natural gas (CNG) are being used commercially. The drop-in fuel being produced by Sasol and Shell is a diesel substitute and thus restricted to diesel cars. CNG is also mainly used by vehicles that don't travel long distances such as public buses or on predictable routes such as trucks.

#### Petrochemicals

The use of natural gas liquids (NGLs) for petrochemical production has grown in major natural gas producing markets such as the US and the Middle East, especially Qatar. As NGL prices are relatively high, but comparatively lower than oil, it is a viable alternative to oil. In the US, chemical companies have announced plans to locate plants close to shale gas fields or natural gas pipelines.

#### Markets

Traditionally the natural gas market has been regional, and to a large extent still is, with most natural gas transported via pipelines and sold via long-term oil-linked contracts. As newer markets have been created for natural gas and demand has grown in geographically isolated countries the market for liquefied natural gas (LNG) has grown considerably in order to transport natural gas over longer distances. A more international market has been developing.

Additional LNG trade routes are expected in the mid-to-long term as Canada and the US become net exporters of LNG gas. Other countries such as Australia are expected to become major exporters, with others losing their market share. Likewise net importing countries may increase domestic production of unconventional natural gas, reducing their import demand.

#### Bottlenecks

The biggest constraint to the market is expected to be a shortage of LNG liquefaction capacity.

### **How can NRG Expert Help?**

NRG Expert's Global Natural Gas Report Edition 1 – 2012 is a study of the global Natural Gas Market and its future development:

- Natural gas prices, supply and future directions for the market
- Potential of unconventional uses of natural gas and NGLs
- Coverage of the natural gas markets at the country-level
- An in-depth analysis of the major independent and state-controlled natural gas players
- Plus much more including forms of natural gas for transportation and natural gas reserves

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