

# The Changing Face of LNG Supply

David Wells

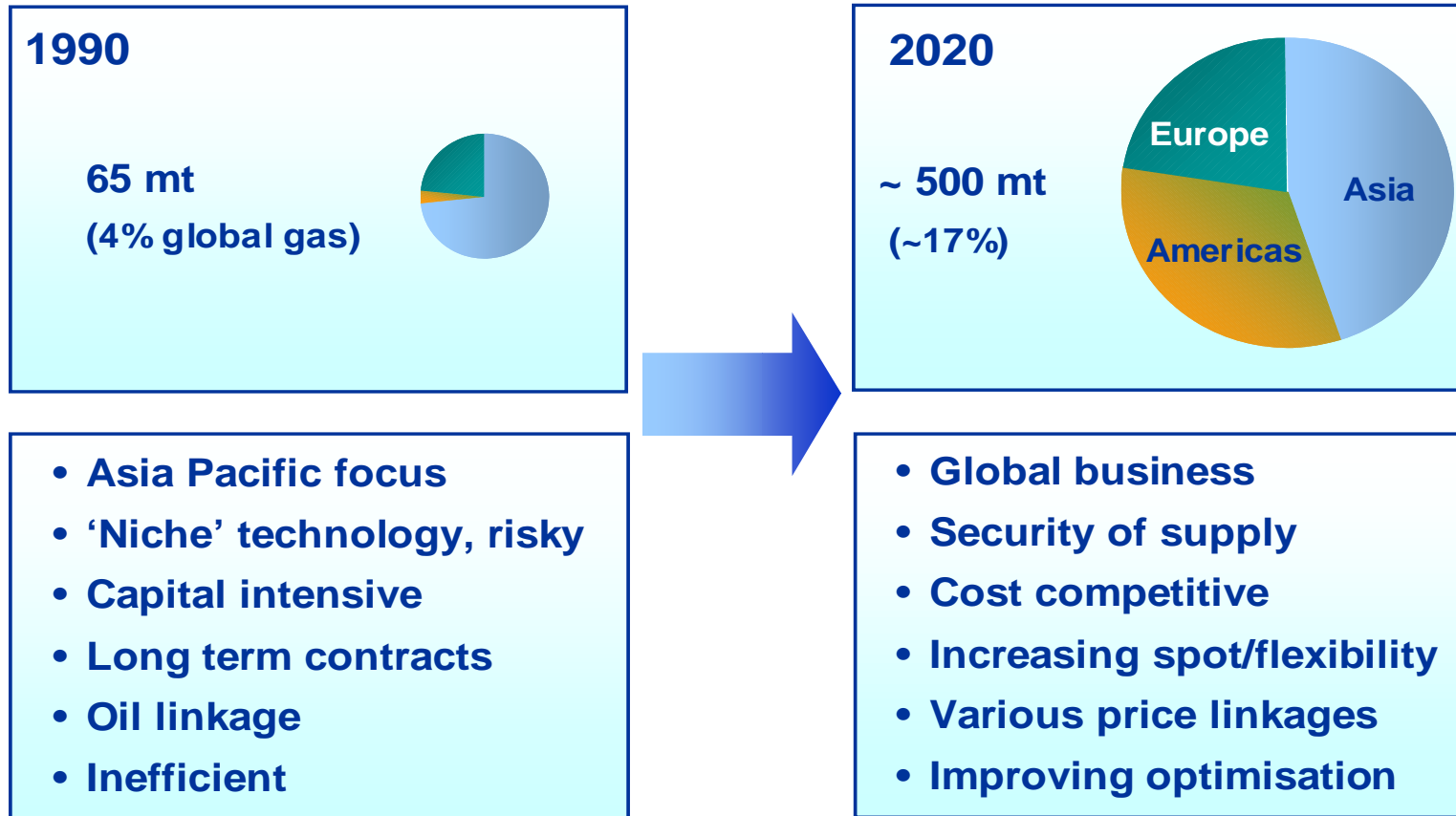
Vice President Global LNG Supply

Shell Gas & Power

13th September 2007

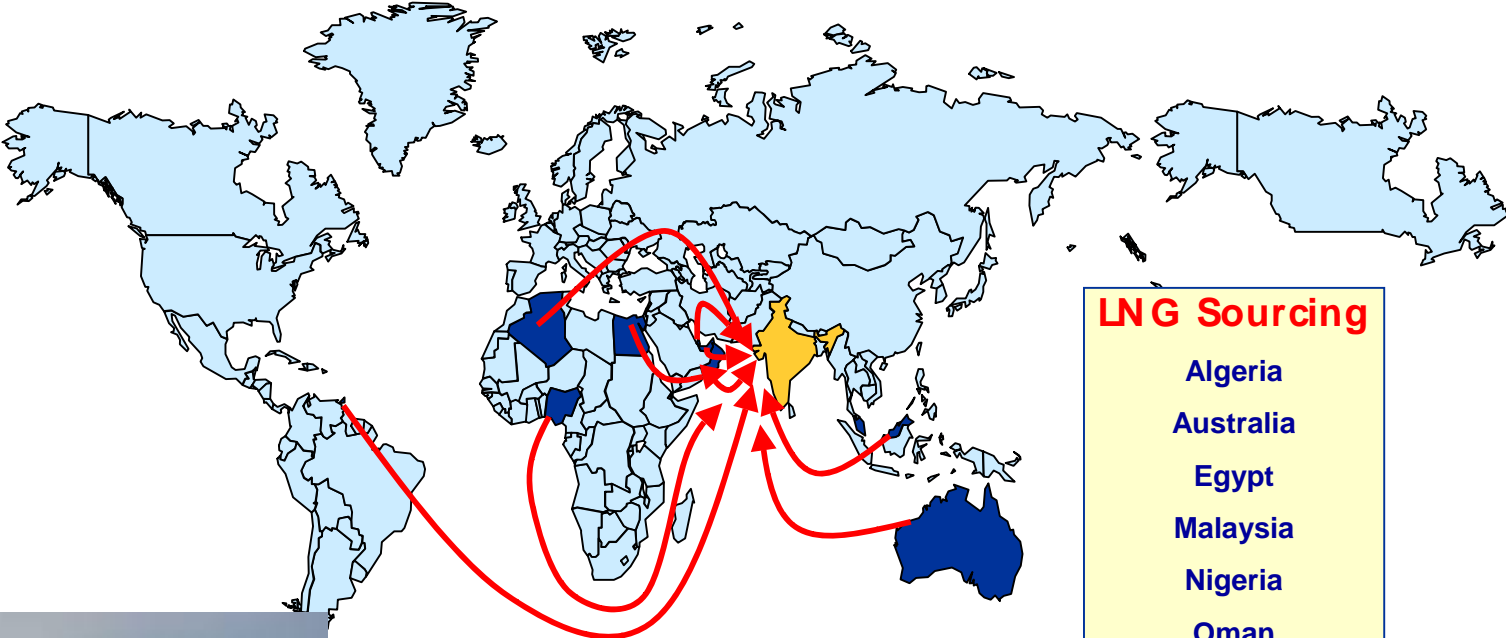


# Trends in global LNG



**Increasing globalization of the Industry**

# Hazira – A Successful Merchant Model



- LNG Sourcing**
- Algeria
  - Australia
  - Egypt
  - Malaysia
  - Nigeria
  - Oman
  - Qatar
  - Trinidad
  - U.A.E.

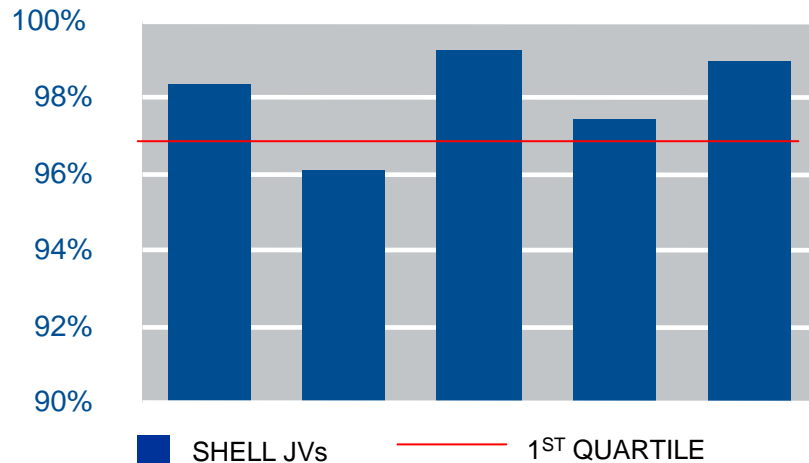
### Enablers

- Novel swaps/diversions
- Proactive selling



# Excellence in LNG operations & shipping

## 2006 SHELL LNG PLANT RELIABILITY\*



## ACROSS 5 SHELL LNG JVs IN 2006\*\*

- Avg. reliability of 98% (“1<sup>st</sup> quartile”)
- Avg. capacity 117% of original design
  - Efficiency improvements
  - De-bottlenecking
- Avg. unit CO<sub>2</sub> emissions better than industry

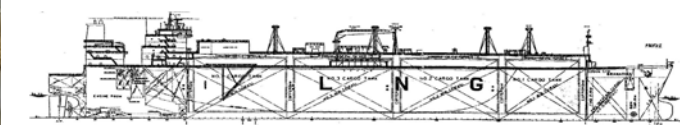
## LEADERSHIP IN LNG SHIPPING

- Supporting 60 ships (~30% world fleet)
- > 9000 cargoes delivered safely over 40 years

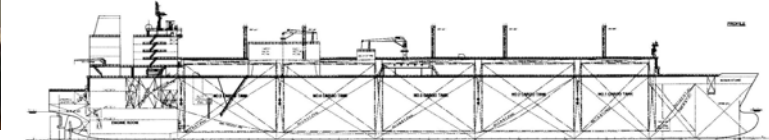
\* Trains in operation >1 year, \*\*SOURCE: Shell analysis

# Transforming LNG Shipping

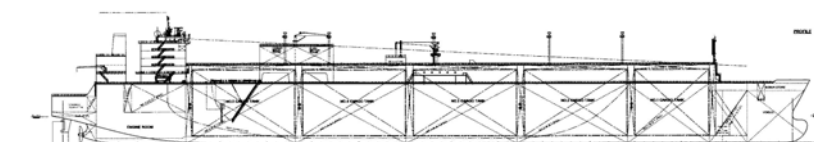
- Size
- Propulsion
- Ownership
- Trading Patterns



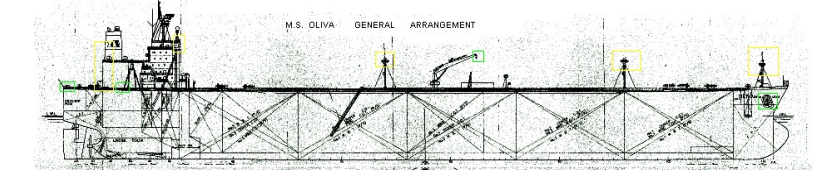
Granatina  
 140km<sup>3</sup>  
 Length – 280m



Qflex  
 210km<sup>3</sup>  
 Length – 315m



Qmax  
 250km<sup>3</sup>  
 Length – 345m



VLCC  
 2 mbbls  
 Length – 333m

