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LNG in China – Part two: The race to build sufficient supply capacity

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LNG in China – Part two: The race to build sufficient supply capacity

As China returns to some semblance of normality after its Covid-19 outbreak, the consensus is that natural gas demand in 2020 will be 10 Bcm lower than forecast before the coronavirus hit – a drop of just 3%. Assuming there is no new major wave of infections as lockdowns ease, the challenge remains to build enough production, import, storage and transportation capacity to satisfy the consumption forecast in part one of this two-part series: 8.3%/year to 2025, which would take demand to 500 Bcm.

Part two seeks to answer how China will meet this challenge and takes a close look at the government's concerns over growing dependence on pipeline gas and LNG imports, as well as the geopolitics around trade and energy security.



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