

LNG SUPPLY, TRANSPORT & STORAGE PHILIPPINES 2013



PAN PACIFIC MANILA, PHILIPPINES | 8 - 10 October 2013

UTILIZING NATURAL GAS AND LNG THROUGH INFRASTRUCTURE DEVELOPMENT AND DISTRIBUTION TO MEET INCREASING DOMESTIC DEMAND



EVENT REPORT

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The first ever **LNG Supply, Transport and Storage Philippines 2013 Forum** attracted 176 delegates. This forum offers a one-shot platform for all serious stakeholders to highlight their positions in and distinctive solutions for the nascent Philippine LNG industry while establishing relationships with key policy-makers and private sector players integral to gas import licensing as well as LNG supply, off-take and distribution. The forum is set to be the annual meeting point for industry stakeholders to connect, network, explore business opportunities - and ultimately - enable the development of a productive and sustainable Philippine LNG sector.

The forum sponsors and exhibitors are listed below.

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The main focus of the inaugural event is on LNG Supply and Infrastructure, which will include discussions on supply solutions, small-scale LNG applications and network connectivity. The program will also address the "hub concept" geared towards exploring options for LNG delivery to marginal demand clusters across the Philippine island-rich landscape.

Industry insights on the aforementioned subjects are critically important to the Philippines as a new entrant to the LNG import market that is increasingly constrained from such perspectives as supply, competitiveness and regulation. We perceive it is the appropriate time for the industry to converge for dialogue and networking around potential opportunities and likely constraints for LNG imports as the new gas master plan nears its completion.

Uniting the global LNG industry into the Philippines - 5th market set to join South East Asia LNG importers' club -, this event attracted many high level stakeholders and decision makers from all over, notably from the Philippines energy and power sectors.

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Two preconference workshops took place prior to the event which were facilitated by Tony Regan, *Principal Consultant* from **Tri-Zen International Pte Ltd**. Tony facilitated two specific and targeted back-to-back workshops entitled “LNG 101: Introduction To LNG Business” and “LNG Import Terminal Projects – Comparing Onshore And Offshore Terminals”.



L-R: Zenaida Y. Monsada (DOE) & Antonio M. Cailao (PNOC)

The first day began with an opening keynote by Zenaida Y. Monsada, *Director Oil Industry Management Bureau, Department of Energy (DOE)*. She went into detail the “Future of LNG for the Philippines”. The next key speaker to take centre stage is **Philippines National Oil Company’s (PNOC) President and CEO**, Antonio M. Cailao. Antonio addressed the audience on the topic “Meeting Increasing Domestic Demand with Natural Gas and LNG: PNOC Role and Goals”.

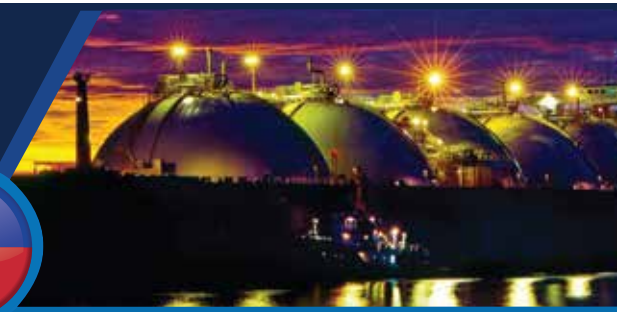


L-R: J. Scott Porter (Shell Eastern Petroleum) & Anton Safronov (Total Gas & Power)

The next two presentations were by the forum sponsors and LNG suppliers. The first presentation was by J. Scott Porter, *Senior Business Development Manager* of **Shell Eastern Petroleum Pte Ltd**. Scott presented on “LNG Solutions for the Philippines” while the next presenter, Anton Safronov *LNG Origination Director* of **Total Gas & Power** covered the topic “LNG Sourcing for Emerging Importers in South East Asia”.

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L-R: Cecile Ballantyne-Jovene (GDF Suez LNG) & Alan Townsend (World Bank)

Two more presentations took place before lunch starting with **GDF Suez LNG's** Vice-President Commercial Asia Pacific, Cecile Ballantyne-Jovene. GDF is one of the events silver sponsors. Cecile spoke on the topic "How to Open New LNG Markets?" One of the most important presentations of the entire forum entitled "Crafting an Effective LNG Development Strategy" took place before lunch and was presented by Alan Townsend, Senior Energy Specialist - East Asia and Pacific Region of the **World Bank Group**.



L-R: Jose B. T. Aldon (First Gen Corporation) & Stéphane Maillard (GTT)

Three more presentations and a panel discussion took place after lunch. The first session began with Jose B. T. Aldon, Senior Adviser, Natural Gas Business of **First Gen Corporation** - one of the biggest power players in Philippines. Jose covered the topic "Integrating Natural Gas Infrastructure to Markets: Challenges and Opportunities". Conference sponsor, **Gaztransport & Technigaz (GTT)** took centerstage next with the topic "Developing an LNG Chain for the Philippines: Membrane Systems Open Up New Opportunities". GTT was represented by its Business Development Manager, Stéphane Maillard.

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L-R: Jakob Stampe (Höegh LNG Asia) & Panel Session

The topic on FSRU was presented next, represented by Jakob Stampe, Director- Regas from **Höegh LNG Asia**. Jakob gave a comprehensive presentation on “FSRU Evolution and Advantages”. A 45 minute panel discussion – entitled Outlook of LNG for Philippines: What Role Can It Play to Bridge the Increasing Demand Gap? – took place before the end of the conference. The panel was moderated by Tony Regan (Tri-Zen International Pte Ltd) and panel members include Antonio M. Cailao (**PNOC**), Jose B. T. Aldon (**First Gen Corporation**), Anton Safronov (**Total Gas & Power**) and Nicolas Lefèvre, VP Business Development Gas & LNG of **Tractebel Engineering**. Tractebel Engineering is also a Silver Sponsor for this event.



L-R: Raj Rattanavich (Poten & Partners) & Akira Miyamoto (Osaka Gas)

The second day began lively with a presentation by Raj Rattanavich, LNG & Natural Gas Consultant at **Poten & Partners**. Raj presented on the topic “Entering the Golden Age of Natural Gas: Changing Dynamics In Future Global LNG Supply And Demand”. This was followed by another presentation by Akira Miyamoto, General Manager & Executive Researcher from **Osaka Gas**. As Japan is one of the biggest importers of LNG in the world, Akira presented on an interesting topic entitled “Japan’s LNG Demand and Challenges for Japan’s LNG Importers”.

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L-R: Franck Le Baron Elengy (GDF Suez) & Orapim Sompongse (EGAT)

The next presenter was Franck Le Baron, VP International Projects of **Elengy (GDF Suez)**. Franck shared his experiences on “Challenges and Opportunities for LNG Import Terminals: The Experience and Views from a European LNG Terminal Owner and Operator”. This was followed by a case study presentation from Thailand’s power generation company, **Electricity Generating Authority of Thailand (EGAT)**. EGAT was represented by Orapim Sompongse, Economist Level 7 with the topic “Integrating LNG Infrastructure for Power Generation Utilization: Thailand’s Gas Market and Outlook for LNG”.



L-R: Akmarhayu Bt Abd Rahim (TNB) & Tony Regan (Tri-Zen International)

An interesting case study from Malaysia’s power generation company, **Tenaga Nasional Berhad (TNB)** was presented after lunch. Akmarhayu Bt Abd Rahim, speaking on behalf of Dr. Mohd Fuad Jamaluddin, General Manager (Power Resource Management) - Single Buyer Dept, Planning Division represented TNB on the topic “Impact of LNG as Energy Fuel Mix for End User”. Tony Regan from **Tri-Zen International** took the podium again presenting an important topic on “The Increasing Role of Small-Mid Scale LNG Projects and Its Applicability for Philippines”

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L-R: Simon Newton (Thyssen Krupp Udhe Energy And Power) & John M. Quirke (Meralco Powergen)

The final presentations started with Simon Newton, *Managing Director, Asia, Thyssen Krupp Udhe Energy And Power*. Simon spoke on the topic “Key Strategies and Economic Decisions in Considering Onshore and Offshore LNG Infrastructure”. The final presentation of the day was by John M. Quirke, *Senior Vice President - Technology & Development of Meralco Powergen*. John discussed the “Perspectives of an LNG Buyer” as Meralco is one of the biggest power companies in Philippines that are seriously looking into utilizing LNG as a fuel source for power generation.

Overall this inaugural forum met its objective in bringing together key LNG stakeholders from both Philippines and the region. This set a solid platform for this event to be the annual meeting point for industry stakeholders to connect, network, explore business opportunities - and ultimately - enable the development of a productive and sustainable Philippine LNG sector.

Join us at the **2nd LNG Supply, Transport and Storage Philippines 2014 Forum** on 14-16 October 2014 at The Peninsula Hotel, Manila, Philippines where we can collectively continue to push the utilization of LNG by fast tracking LNG Supply imports and LNG infrastructure development.