

Qatar LNG Market - Segmented by LNG Infrastructure (LNG Liquefaction Plants, LNG Regasification Facilities, and LNG Shipping), By Application (Residential, Commercial & Industrial), By Region, Competition, Forecast and Opportunities, 2028F

Market Report (3 business days) | 2023-10-03 | 73 pages | TechSci Research

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Report description:

Qatar LNG Market is anticipated to grow at a steady pace in the forecast period 2024-2028. With the increase in the demand for LNG fuel by ship builders, it is anticipated that LNG would grow over the alternative fuels such as biodiesel, solar, and wind. In addition, it is anticipated that the use of LNG as marine fuel in the shipping industry would expand due to the country's increased demand for natural gas as a result of fewer emissions. Qatar Petroleum would raise the country's LNG production capacity to 126 million tons per annum (MTPA) by 2027, marking a 64% increase from the current 77 mtpa.

LNG has no smell, color, toxicity, or corrosion. Asphyxia, freezing, and flammability after vaporization into a gaseous form, are some associated risks. The liquefaction process requires the removal of several substances that could cause problems downstream, such as dust, acid gases, helium, water, and heavy hydrocarbons. The natural gas is subsequently cooled to around 162 °C (260 °F), at which point it is condensed into a liquid at pressures close to atmospheric pressure. The maximum transport pressure is set at about 25 kPa (4 psi), or one-fourth of the atmospheric pressure at sea level.

Growing Demand of Distributed Power to Propel the LNG Market in Qatar

Over the years, market growth is anticipated to be driven by an increasing focus on distributed power and utility projects. Demand for liquefied natural gas (LNG) would rise in different countries due to the anticipated rise in natural gas demand in the power generating sector. The most popular way to generate electricity is with coal. However, because of its diminishing supply and harmful effects on the environment, natural gas and other renewable energy sources are now used more frequently. Growing public understanding of alternative forms of energy is one of the main factors contributing to rising petrol use. Additionally, as transmission and distribution infrastructure advances, additional demand is anticipated in the coming years.

The main factor of Qatar's economy has been the oil and gas industry. Although the industry has continued to receive most of the Qatari investment throughout time, the focus has progressively changed in favor of growing the nation's gas output and liquid

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natural gas (LNG) export capability. The large recoverable offshore gas deposits in Qatar's North Field have been the driving force behind the nation's quick economic development. With a GDP per capita of more than USD84,000 at current prices, Qatar is one of the richest nations in the world as there is an increase in gas export revenues, which totaled USD132 billion in 2021. Moreover, these revenues also fueled the expansion of the nation's sovereign wealth fund (SWF), which is to be worth USD450 billion, in 2022.

The spot price in Asia, where Qatar sells the majority of its gas, dropped to its lowest level in a decade as a result of a global LNG oversupply. Despite this, Qatar remained steadfast in its commitment to sustaining growth. The COVID-19 pandemic's subsequent global market upheaval compelled Qatar Petroleum to delay the beginning of production from its new gas facilities until 2025, but it did not lead to a decision to cut back the North Field project. Instead, Qatar Petroleum continued its domestic and international expansion.

In February 2021, the final investment decision (FID) to move through with the North Field East development was announced, with Qatar again betting that it will be able to withstand market shocks. By 2025, capacity at North Field is anticipated to expand by 43%, from 77 million tonnes per year (mtpa) to 110 mtpa. Phase two will boost production capacity from 110 mtpa to 126 mtpa by 2027, which is a cumulative increase of 64%.

Rising Investments in Oil & Gas and Utility Projects to Drive the LNG Market

The economy of Qatar is heavily reliant on the energy sector. According to IMF projections in 2021, the oil industry contributed 81% of Qatar's overall government income in 2021, up from 77% in 2020. Revenues from the export of hydrocarbons increased from USD47 billion in 2020 to around USD77 billion in 2021. In 2021, Qatar was the second-largest LNG exporter, the third-largest holder of natural gas reserves, and the sixth-largest producer of dry natural gas in the world (after the United States, Russia, Iran, China, and Canada). Due to Qatar's high natural gas production, lucrative petroleum liquid byproducts including lease condensates and hydrocarbon gas plant liquids (HGLs) are produced in substantial quantities. Additionally, Qatar is a leader in the production of gas-to-liquids (GTL) and serves as an establishment to the largest GTL facility in the world.

Doha introduced its ambitious climate change action plan, the Qatar National Environment and Climate Change Strategy, 18 months ago. It calls for a decrease of 25% in the carbon intensity of its LNG plants and upstream operations by 2030. According to reports, a carbon capture and storage (CCS) facility will be a part of the North Field development and be located in Ras Laffan's CO2 capture and storage cluster. The fact that QE is increasing its investments in the energy transition shows that it is willing to accept the financial risk necessary to protect demand as the globe works to achieve net-zero emissions and to ensure the nation's long-term sustainability.

Liquefaction Sector to Dominate the Market

In terms of operating LNG liquefaction capacity as of 2020, Qatar, the United States, Malaysia, Russia, Indonesia, and Algeria were next, and Australia took the lead. Australia led Qatar as a market with the highest capacity for liquefaction in 2019 and as the largest market in 2020. Australia's MTPA increased by 12.5 MTPA in 2019 because of Ichthys LNG T1-T2 and Prelude LNG, starting online. At its peak, Ichthys LNG is anticipated to produce more than 100,000 barrels of condensate per day and up to 9.3 million tonnes of LNG and 1.65 million tonnes of LPG, annually. Qatar is expected to restore its position as the market with the greatest liquefaction capacity by 2026-2027. In February 2021, Qatar finished the North Field East Project (NFE), which comprises of four 8 MTPA mega LNG trains. The project's expenditure is around 28.75 billion USD. Furthermore, with the upcoming project of 33 MTPA, Qatar's LNG production would expand to roughly 110 MTPA by 2027.

Australia, Qatar, and the United States, the top three LNG exporting countries, accounted for about 50% of the world's liquefaction capacity as of 2020. The liquefaction sector is therefore anticipated to dominate the Qatar LNG market during the forecast period based on the above factors.

Market Segmentation

The Qatar LNG Market is divided into LNG infrastructure, application, and region. Based on LNG Infrastructure, the market is segmented into LNG Liquefaction Plants, LNG Regasification Facilities, and LNG Shipping. Based on Application, the market is segmented Residential, Commercial and Industrial. The market is also segmented by region Doha, Al Rayyan, Al Wakra, Umm Slal, Al Khor and Al Thakhira, and Rest of Qatar.

Market Players

Major market players in the Qatar LNG Market are Occidental Petroleum Corporation, DAKSHIN GROUP WLL, Anotech Energy,

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Smith International, Inc., Gas Exporting Countries Forum (GECF), MPH Technical Services, Buzwair Holding, Delta (Doha) Corporation, Qatar Petroleum, Craig International.

Report Scope:

In this report, the Qatar LNG Market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

-□ Qatar LNG Market, By LNG Infrastructure:

- o□ LNG Liquefaction Plants
- o□ LNG Regasification Facilities
- o□ LNG Shipping

-□ Qatar LNG Market, By Application:

- o□ Residential
- o□ Commercial
- o□ Industrial

-□ Qatar LNG Market, By Region:

- o□ Doha
- o□ Al Rayyan
- o□ Al Wakra
- o□ Umm Slal
- o□ Al Khor and Al Thakhira
- o□ Rest of Qatar

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Qatar LNG Market.

Available Customizations:

Qatar LNG Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

-□ Detailed analysis and profiling of additional market players (up to five).

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