

LNG Unlimited

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New Zealand advances LNG tender, decision delayed post-election

New Zealand is continuing procurement for its first LNG import terminal but will not decide whether to proceed until after the general election, scheduled for November 7. Contracts are need to be signed before year-end to get the terminal into operation by 2028, to mitigate dry-year risk.

Since the Government announced the facility in February 2026, wholesale electricity prices for 2028 and 2029 have fallen by around \$20/MWh, delivering potential savings of up to \$800 million a year for households and businesses, according to the Ministry of Business, Innovation and Employment (MBIE). The government says imported LNG could help mitigate fuel shortages and stabilise electricity supply, particularly during periods of low hydro generation.

But the project at Port Taranaki is on hold in the run-up to the general election. New Zealand First leader Winston Peters said no decision had been made, describing it as the “collective decision” of all three parties in the Cabinet. ACT leader and deputy prime minister David Seymour said he wanted the



government to secure “the best possible deal,” which might not be possible to achieve prior to the election.

“There can be progress (...) the government is carrying out a tender, and that can continue. But it doesn’t mean that you make your decision before the election,” Seymour told local media, noting

the signing of an LNG development contract during the election process would be “irresponsible.”

Dry-year-risk

Heatwaves and drought are becoming more frequent and intense as climate change progresses, putting pressure on

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IMF warns war-driven oil, LNG prices will keep inflation high

The International Monetary Fund (IMF) has warned that war-driven oil and LNG prices will keep global headline inflation high in 2027, adding to pressure on households, industry and public finances in energy import-dependent economies.

Releasing its October World Economic Outlook at the IMF and World Bank Annual Meetings in Bangkok, the IMF said global headline inflation is expected to rise to 4.7% in this year, before easing to 4.1% in 2027. Elevated energy and fuel prices have been eroding household purchasing power and making

industries in the manufacturing and agriculture sector struggle to break even.

The IMF said the Iran conflict has pushed oil and gas prices well above pre-war levels, while LNG prices have also risen sharply. Shipping through the Strait of Hormuz is effectively closed due to

drone strikes on tankers, causing fuel shortages which, in turn, sustain inflationary pressure across advanced and emerging economies.

Analysts stressed that refined-product prices are 60-97% above pre-conflict levels, with higher energy demand – including from

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New Zealand's electricity supply. Dry-year risk is priced into New Zealand's electricity contracts and, according to MBIE, has cost the economy \$5.2 billion in lost GDP in 2025 alone.

Risk premiums of \$30-50/MWh are added to wholesale electricity prices, the ministry estimates. High electricity prices are burdening the economy, reducing household spending power by 1.65% and reducing the trade balance by \$275 million in 2025, MBIE says.

The government's Electrify NT reforms have encouraged investment in new wind, geothermal and battery projects. But, Energy Minister Simeon Brown pointed out that "no renewable alternative can cover the weeks or months needed to back up our power system by 2028, when the next dry year could arrive."

"An LNG import facility is the fastest and most affordable way to cover the dry-year gap, keep the lights on, and protect thousands of Kiwi jobs. Every other comparable country in the OECD either has access to abundant natural gas or access to gas imports," he said.

"New Zealand is an outlier, and it is time we caught up."

Adding dispatchable power

Imported LNG could change the merit-order of power plant dispatch. "Electricity generators will use more clean, cheap hydro to make electricity, instead of holding it in reserve in case we have a dry year," Brown argues.

MBIE says LNG-fuelled power generators would be dispatched alongside renewables as New Zealand moves towards a "mostly renewable electricity system. The government hopes that imported LNG could help stabilise electricity prices and give renewables developers a reliable back-up during dry years.

Eager to appease critics, the government assured the proposed terminal's environmental impact will be reviewed by regulators and MBIE. The ministry has identified sensitive local environments including Ngāmotu Beach, marine protected areas around the Ngā Motu and the Sugar Loaf Islands as well as the Tapuae Marine Reserve. ■

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electrification of transport and AI-related energy consumption - adding to price pressure.

Strain on global growth

The IMF raised its 2026 global growth forecast to 3.1%, a less severe slowdown than previously expected, but it warned that resilience is being strained by energy supply-side constraints, geopolitical disruptions and mounting fiscal risks in key economies.

"Stubborn conflicts, high energy prices and rapid technological

disruptions are deepening the divide between economic winners and losers across the globe," the IMF said in its outlook, warning "fiscal buffers are limited in many countries."

For LNG markets, the outlook signals a continued premium on flexible cargoes and storage capacity. Higher gas prices support LNG exporters' revenues but can weaken demand from price-sensitive European and Asian industrial users, particularly where gas-fired power generation and energy-intensive manufacturing face shrinking margins. ■

EU prepares to delay methane import rules by one year

European Energy Commissioner Dan Jørgensen said he has asked his team to examine a one-year delay to methane requirements for imported oil, pipeline gas and LNG. The proposed change would move the start of the EU Methane Regulation's import provisions from January 1, 2027 to the beginning of 2028.

The retreat follows mounting concerns that the regulation could complicate LNG imports precisely at the time when Europe's gas inventories are at record low which puts the bloc's economies at risk of a difficult winter. The delay is not yet law and still needs to be approved by EU member states, with Jørgensen telling Parliament this week "we do not foresee this to be more than one year."

Under the existing framework gas and LNG importers need to demonstrate that supplied volumes meet methane-monitoring, reporting and verification standards. The potential scale of the trade impact is substantial, although estimates vary sharply according to how the rules are enforced.

A Wood Mackenzie study, commissioned by industry group Concawe, estimates that about 43% of EU natural-gas imports – roughly 114 billion cubic metres (bcm) – could be non-compliant in 2027 under a strict scenario. That is equivalent to about 39% of the EU's 2025 LNG imports of 146 bcm, if the hypothetical shortfall were expressed against LNG volumes. Analysts cautioned however, the findings should not be interpreted as a forecast that this quantity of LNG would actually disappear from Europe.

US cargoes are particularly in



EU Energy Commissioner Dan Jørgensen

focus because American shale-gas producers and LNG exporters have been among the most vocal opponents of the EU Methane Regulation.

Charlie Riedl, senior vice president of the Natural Gas Supply Association, said "U.S. exporters are asking for targeted clarifications on the new methane law and that the implementation be delayed until the European Commission and member states provide clarity on compliance, informed by industry input."

The NGSA represents US natural-gas suppliers, including LNG exporters, and warned that regulatory uncertainty was already affecting long-term contracting with European customers. The issue is especially consequential given the scale of US-EU LNG trade: US cargoes accounted for 58% of EU LNG imports in 2025, making American supply the bloc's single largest source of LNG. ■

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Singapore begins to work on third SLNG jetty to expand LNG bunkering

Singapore LNG (SLNG) has begun construction of a third jetty at its Jurong Island terminal to boost LNG reload and bunker capacity, with completion targeted in the second half of 2028. The new berth is designed to support about 2 mtpa of LNG bunker reload demand, including break-bulk and other small-scale LNG operations.

SLNG's existing infrastructure can handle around 1 mtpa of LNG bunker reloads. Once Jetty 3 is operational, the terminal's combined capacity could reach up to 3 mtpa, subject to market demand, the operators said.

The new jetty will be able to accommodate LNG carriers with capacities of 5,800-80,000 cubic metres and will be SLNG's first dedicated berth for small- and mid-scale carriers. That should broaden the terminal's ability to serve LNG bunker vessels, coastal carriers and smaller importers, in addition to conventional large-scale LNG cargoes.

"Jetty 3 will strengthen Singapore's ability to support the next

phase of growth and reinforce its position as a leading global bunkering and LNG trading hub," SLNG chief executive Leong Wei Hung said. With this investment, Singapore's seeks to retain its role as Asia's largest bunkering hubs.

Bio-LNG certification

The import facility is among the first in the region to achieve certification under the International Sustainability and Carbon Certification EU (ISCC EU) scheme for the handling of bio-LNG. The certification allows SLNG to store, regasify and deliver bio-LNG under the ISCC framework, providing a chain-of-custody basis for biomethane-based LNG supplied into the terminal.



For shipowners facing tightening emissions rules and growing pressure from cargo owners to reduce greenhouse-gas intensity, certified bio-LNG could offer a practical route to lower well-to-wake emissions without requiring new engine technology.

Bio-LNG remains a niche marine fuel, constrained by limited biomethane feedstock and higher costs than conventional LNG. But terminal-level certification is a prerequisite for scaling supply.

ISCC EU certification of Jetty 3 will give traders and shipowners greater supply-side flexibility in a market where bunker availability, certification and vessel compatibility increasingly determine fuel choices.

"If Singapore can convert its expanded reload capacity into reliable LNG and bio-LNG bunkering services, Jetty 3 could help the city-state defend its competitive position against rival Asian hubs," analysts commented. ■

Sempra advances Port Arthur commissioning prior to 2027 start-up

Sempra Infrastructure is advancing preliminary commissioning work at its Port Arthur LNG export project in Texas, with a view to getting Train 1 into commercial operations at or near the end of 2027, followed by Train 2 in 2028.

The Port Arthur liquefaction project is being developed in Jefferson County, on the US Gulf Coast. Phase 1 comprises two LNG trains 13 mtpa nameplate capacity combined, or about 6.5 million tons per train.

Phase 1 has an estimated capital cost of approximately \$13 billion. Sempra closed a \$6.8 billion non-recourse project-financing package when it took final investment decision in March 2023 and issued the engineering contractor Bechtel a full notice to proceed.

On time and on budget

Sempra has listed commissioning Port Arthur LNG and the completion of the ECA Phase 1 project in Ensenada, Mexico as its "key priorities." In addition to the commissioning process at ECA LNG Phase 1, we are also advancing construction on Port Arthur LNG Phases 1 and 2, a world-class LNG export facility in Port Arthur, Texas. In total, completion of both phases of construction is expected to add 26 mtpa of new nameplate

export capacity," the company said in an infrastructure update.

"Construction at both facilities continues to remain on time and on budget," Sempra underlined.

Phase 1 almost fully subscribed

Port Arthur LNG is a joint venture between Sempra Infrastructure and ConocoPhillips. ConocoPhillips holds a 30% non-controlling interest in Phase 1, supplies the project's natural gas and has contracted to purchase 5 mtpa of LNG for 20 years.

Approximately 10.5 mtpa of Phase 1's long-term contractable capacity is fully subscribed. ConocoPhillips will offtake volumes in accordance to its equity stake. Other publicly disclosed offtake volumes include 2.25 mtpa for RWE, approximately 1 mtpa for PKN ORLEN, about 1.4 mtpa for INEOS and approximately 875,000 mtpa for ENGIE.

For Port Arthur Phase 2, Sempra announced a 20-year SPA with Petrobras in mid-September for the supply of about 0.8 mtpa of LNG. ■

Freedom LNG seeks DOE approval for 6 mtpa Mexican project

Freedom LNG has filed an application with the U.S. Department of Energy (DOE), seeking 20-year authorisation to send up to 343 billion cubic feet per year (bcf/y) of U.S. natural gas by pipeline to Mexico and re-export up to 307 Bcf/y as LNG from its proposed Bravo LNG terminal in Mexico.

Bravo LNG is proposed nearshore the Port of Matamoros in the Mexican state of Tamaulipas, close to the U.S.-Mexico border. Freedom LNG has previously described the project as a 6 mtpa development, using floating liquefaction facilities rather than more expensive land-based structures.

The DOE application seeks permission to export 0.94 Bcf/d of U.S. gas to Mexico and to re-export 0.84 Bcf/d as LNG. At typical conversion rates, the requested re-export volume is consistent with an LNG project of roughly 6 mtpa. ■



Freedom LNG; source: Flex

EU imports record 12.2 mtpa of Yamal LNG for €7.88 billion

European Union countries imported a record 12.18 million tonnes of LNG from Russia's Yamal Arctic project in the first nine months of 2026, up 9.5% year on year, Kpler data shows. Urgewalt analysts estimate the EU's spending on these Yamal cargoes reached €7.88 billion over the period, including €1.92 billion euros in the third quarter.

Europe stayed the largest market for LNG from the Russian Arctic, accounting 85% of Yamal's recorded deliveries by volume in the first nine months - even as its worldwide exports fell 1.3% year on year.

Most Yamal cargoes went to France

Port in the EU ports received 167 Yamal cargoes between January and September, equivalent to roughly one cargo every 1.6 days. September deliveries were 792,440 tonnes, marginally above the same month last year and valued at an estimated €818 million.

France received nearly three-quarters of the month's EU deliveries, while no Yamal cargoes were recorded in Spain or at Belgium's Zeebrugge terminal.

Ban on Russian LNG ahead

The continued inflow came despite EU restrictions on Russian LNG supplied under short-term contracts, which took effect on April 25 but Urgewald campaigners said the measures had yet to produce a noticeable reduction in deliveries. A full EU ban on Russian LNG imports under eligible existing long-term contracts is due to take effect on January 1, 2027.

Sebastian Roetters, Urgewald sanctions campaigner, said Europe's purchases gave Russia a large nearby market and called on the bloc to close remaining loopholes, particularly those supporting the Arc7 tanker fleet. "Every additional month of largely uninterrupted LNG trade means further revenue for Russia," he said. ■

PetroChina delivers first LNG cargo to Rotterdam's Gate terminal

Sempra Infrastructure is advancing preliminary commissioning work at its Port Arthur LNG export project in Texas, with a view to getting Train 1 into commercial operations at or near the end of 2027, followed by Train 2 in 2028.

PetroChina International, the trading arm of state-controlled PetroChina, delivered the cargo to Gate on Monday, marking the start of the company's long-term capacity booking at one of northwest Europe's key LNG import hubs.

The Chinese company secured the capacity through a tender in 2023, obtaining rights to 2 billion cubic metres per year (bcm/y) of regasification capacity and corresponding 20-year storage capacity, commencing October 1, 2026.

BP separately secured an identical 2 bcm/year, 20-year capacity booking at Gate under the same expansion project.

Gate Terminal, situated at the Maasvlakte in the Port of Rotterdam, has recently been expanded by a fourth LNG storage tank and 4



Gate LNG Terminal

bcm/year of regasification capacity, lifting total terminal capacity to 20 bcm/year. Project finance for the expansion was underpinned by long-term regas capacity bookings by BP and PetroChina.

A capacity agreement is not a traditional LNG sale-and-purchase

contract: it gives the seller the right to deliver cargoes to Gate, store LNG at the site and regasify it for injection into the Dutch gas grid. If PetroChina sold the regasified LNG onwards to a European buyer, or held within its own portfolio was not disclosed. ■

Europe faces high gas prices into 2027 on low stocks

European households and industries face at least another year of high gas prices as inventories sit nearly 15% below normal filling levels for October, leaving the EU dependent on scarce LNG cargoes and facing a costly refill campaign next summer.

"Europe is going into this winter (...) with less gas in storage and less room for error," said Lucie Boost, Secretary General at Gas Infrastructure Europe. According to GIE data, EU underground storage was 73.6% full in mid-October, compared with a five-year average of 87% for the same period.

ENTSOG, the European Network of Transmission System Operators for Gas, warns that constrained LNG availability could push inventories well below 30% by the end of winter. Under its tight-LNG scenario and reference winter demand, storage could fall to 13% by the end of March 2027.

That warning is alarming, considering storage covered about 26% of EU gas consumption last winter, down from about 30% in 2024/25.

With inventories starting lower, the system has less flexibility to absorb cold spells, unplanned outages or delays in LNG deliveries.

LNG to fill the gap

Imported spot LNG cargoes are expected to account for about 40% of total supply this winter under ENTSOG's optimal-supply scenario, with Norway providing around 27%. Europe has about 1,600 Terawatt-hour (TWh) per winter, or roughly 145 billion cubic metres, of regasification capacity.

Analysts warn, however, that physical import capacity alone does not guarantee cargoes will be available when needed. Global gas and LNG markets remain extremely tight as uncertainty abounds about how quickly Qatari

LNG supply will return to normal once safe transit through the Strait of Hormuz gets reinstated.

Iran has announced plans to establish an exclusion zone outside the Strait of Hormuz, to target vessels attempting to transit the waterway. Mohsen Rezaei, head of Iran's Supreme National Security Council, said in late September the zone would extend from the line of the US naval blockade. However, an escalation of hostilities has in the strait has since derailed progress in deescalating the tense security situation.

Two tankers were attacked in the Strait of Hormuz and at Sohar anchorage off Oman on 11 October, with two Indian seafarers missing after a drone strike on an oil product tanker. ■

Malaysia's MISC accepts Petronas charter for five more LNG carriers

Malaysian shipping group MISC has accepted a letter of award from Petronas for the charter of five additional LNG carriers, committing to a newbuilding programme at China's Hudong-Zhonghua, with construction due to begin in 2027 and deliveries targeted for 2030.

The five 174,000-cubic-metre vessels will each be employed on firm 20-year time charters with Petronas LNG, an indirect subsidiary of MISC's parent Petronas. The contract award follows an earlier series of five 174,000-cbm carriers ordered for Petronas LNG charters, with those vessels due to enter service between 2029 and 2030.

The award reinforces Petronas LNG's strategy of securing long-term shipping capacity for its liquefaction and trading business. The announcement comes amid

growing investment in LNG shipping as exporters bring new capacity online and importers seek flexible supply. Long-term charters give shipowners revenue visibility and help underwrite multi-billion newbuilding programmes.

MISC did not disclose the capital expenditure for the five additional ships in its stock-exchange announcement. Based on prevailing newbuilding prices for large membrane-type LNG carriers, the programme would imply a total investment of roughly \$1.25 billion to \$1.5

billion, or about \$250 million to \$300 million per vessel.

The newbuilds will be financed and owned through MISC subsidiaries. The company said its wholly owned unit will provide shipping services under the charter agreements, with MISC responsible for project management during

construction and for technical and commercial operation after delivery.

MISC said construction of the five carriers is expected to start in 2027. The company has targeted delivery in 2030, when the vessels are due to begin their 20-year charters. ■



Seatrium wins Excelerate FSRU conversion, targets 2028 delivery

Singapore-based Seatrium has secured an engineering, procurement, construction, installation and commissioning (EPCIC) contract from Excelerate Energy to convert an LNG carrier into a floating storage and regasification unit (FSRU), with delivery targeted for 2028.

The contract stipulates the conversion of the 170,000-cubic-metre LNG carrier *Methane Patricia Camila* into a fully operational FSRU. The

vessel will retain LNG storage capacity of 170,000 cubic metres after conversion. Works are due to begin in the fourth quarter of 2026, Seat-

rium said in a Singapore Exchange announcement, adding there is a contractual option for a second FSRU conversion.

It is Seatrium's first EPCIC FSRU conversion project for Excelerate, which operates one of the world's largest FSRU fleets. The Texas-based company has historically focused on purpose-built FSRUs, although conversions can offer a faster route to adding capacity by using existing LNG-carrier hulls.

The award adds to the Singapore shipbuilder's orderbook as it seeks to capitalise on demand for floating LNG import infrastructure, particularly in markets that need rapid gas-supply capacity without building onshore terminals.

Excelerate Energy, headquartered in The Woodlands, Texas, has positioned FSRUs as a central part of its LNG infrastructure platform. "The vessel will become the 13th FSRU in our fleet and will expand the reach and capabilities of our LNG infrastructure platform," stated David Liner, Excelerate's executive vice president and chief operating officer (COO).

The award follows Excelerate's decision in July to appoint Nord Gas Solutions to supply the regasification module for the *Methane Patricia Camila* conversion. That module is scheduled for delivery in the first half of 2028, broadly aligned with Seatrium's target completion date. ■



Samsung Heavy Industries bags contract for two LNG carriers

Samsung Heavy Industries has secured an order worth 672.20 billion South Korean Won (US\$504m) to two LNG carriers, which brings the company's total order backlog to 46 commercial vessels and orders worth over US\$8 billion this year.

Daol Investment & Securities expects Samsung Heavy Industries to markedly improve its profitability in the shipbuilding sector in the third quarter, with strong earning growth seen to continue into 2027, largely thanks to rising demand for floating LNG terminals. The broker-

age upheld its "buy" rating and target price of 41,000 won.

Samsung Heavy Industries' third-quarter revenue was pegged at 3.2487 trillion won, up 23% year-on-year and 1% from the previous quarter. Operating profit is anticipated to rise 58% to 376.8

billion won, up 16% from the previous quarter.

The order trend is pointing upwards, with Samsung Heavy Industries' cumulative orders this year standing at \$11.59 billion, including \$7.15 billion onshore and \$4.4 billion offshore. ■

Shell, partners approve LNG Canada Phase 2

Shell – and its partners PETRONAS, PetroChina, Mitsubishi and KOGAS – have taken a final investment decision (FID) on the second phase of LNG Canada, approving a C\$33 billion expansion that will double the British Columbia export terminal's production capacity to 28 mtpa.

The project will add two liquefaction trains at the Kitimat facility, raising total capacity from 14 mtpa. Commercial operations are expected to begin in the early 2030s, Shell announced today.

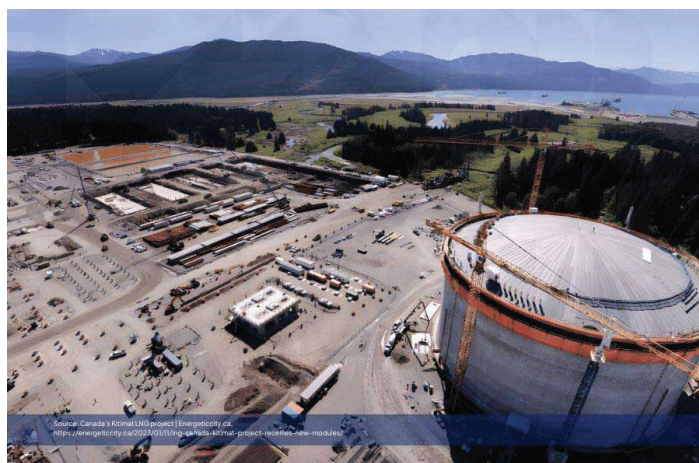
FID on the second phase of LNG Canada marks a major expansion of the country's LNG industry, with the Shell-led project being the country's first large-scale LNG export project - positioned on the Pacific coast to supply customers in Asia.

Shell owns 40% of LNG Canada and expects to receive nearly 6 mtpa of additional LNG from Phase 2. The other partners are Malaysia's Petronas, with a 25% stake; PetroChina, with 15%; Japan's Mit-

subishi Corporation, with 15%; and Korea Gas Corporation, with 5%.

Project partners' approval comes as LNG producers and buyers prepare for a period of strong growth in global liquefaction capacity. New projects in North America and elsewhere are expected to add substantial supply during the late 2020s and early 2030s.

LNG Canada's first phase comprises two trains with combined capacity of 14 mtpa. The facility began operations in 2025 and has since shipped more than 100 cargoes. Phase 2 will use existing infrastructure and site layouts designed to accommodate the additional trains. The expansion will include an additional LNG stor-



age tank, a condensate tank and loading berth, as well as expanded utility and process systems.

To secure a stable flow of feedgas, LNG Canada partners

also agreed to work with Coastal GasLink to expand the existing 670-kilometre pipeline through the addition of five compressor stations.

Tecnimont signs FEED contract for Argent LNG

Tecnimont USA has signed a Front End Engineering Design (FEED) contract with Argent LNG for the developer's 25 mtpa export facility at Port Fourchon, Louisiana. First cargo is targeted for 2030.

Jonathan Bass, chairman and CEO of Argent LNG, said the FEED award moves the project "from vision to execution," adding that Tecnimont's engineering depth and modular expertise would help deliver a "bankable, buildable" scheme for international buyers.

He reiterated Argent's aim to supply Europe and other allied markets, with first cargo targeted for 2030.

The FEED agreement, signed on Monday, follows a January 2026

cooperation deal with Tecnimont, the engineering arm of Italy's MAIRE group. The timing of the contract signing comes as US LNG developers race to secure permits, offtake and financing against a backdrop of strong Atlantic Basin demand.

The FEED phase will specify Argent LNG technical definition and improve bankability ahead of a final investment decision (FID). To that end, Tecnimont's scope of work will cover project execu-

tion planning, schedule and cost estimation, safety and reliability studies, and integration of the facility's core technology packages, including gas pressure treatment and modular design elements.

Hurricane resilient energy hub

Port Fourchon, situated just south of New Orleans, has become a focal point for new US LNG export capacity given its deep water access and existing pipeline interconnections.

The facility, which will be located in one of the United States' "hurricane-resilient energy hubs", will have an initial capacity of 12 mtpa from the first set of modular liquefaction trains, and an explicit option to expand to the full 25 mtpa in a second phase.

In July, the US Department of Energy authorised Argent LNG to export LNG from its proposed Port Fourchon, Louisiana, terminal to countries that have free-trade agreements with the United States.

CLdN orders LNG-fuelled ships from Hyundai

Luxembourg-based shortsea operator CLdN has ordered two LNG-fuelled RoRo vessels from the South Korean shipyard Hyundai Heavy Industries, with delivery scheduled for mid 2029.

The contract is valued at approximately 336.2 billion Korean Won, equalling about US\$248 million.

The two trailer-focused RoRos will be capable of running on liquefied natural gas or conventional marine diesel, aligning with CLdN decarbonisation strategy. The ships will also have space reserved for installing electric shaft generators and batteries at some point in the future, as the technology matures.

Construction is set to begin in early 2028.

By locking in dual-fuel tonnage for 2029, CLdN seeks to meet tightening EU and IMO emissions rules while hedging against fuel-price volatility and carbon costs.



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