



Weekly News

6 October 2023

BOTAS hikes gas and electricity prices by 20% for industry

Turkey's state-owned energy company BOTAS has raised prices for natural gas and electricity by 20% for utilities and industrial users amid an "unprecedented shortage" which had disrupted fuel supply for gas-fired power plants. Shortages may have been caused by reduced pipeline gas flows from Azerbaijan which will likely be compensated by rising LNG imports in the months ahead.

BOTAS stressed there has been no change in the wholesale price of natural gas used in domestic residences, despite grave concerns about energy security in the South Caucasus region. Turkey is the main transit country of natural gas from Azerbaijan in to the European Union and also the starting point for the Trans-Adriatic Pipeline (TAP) which entered operations in 2020 and supplies Azeri gas onwards to Greece, Italy and the Balkans.

Azerbaijan sent armed forces into the autonomous Nagorno-Karabakh regions two weeks ago, prompting thousands of ethnic Armenians to flee. Western states are debating whether to levy sanctions against the government in Baku, which could retaliate by reducing gas exports – just prior to the start of the winter season.

LNG helps fill the supply gap

Turkey is taking precautions to compensate reduced Azeri gas flows with LNG shipments, with analysts expecting demand for spot LNG



BOTAS' Marmara Ereğlisi LNG terminal

from BOTAS will increase markedly over the coming month.

Construction of a new jetty in Saros Bay for a floating storage and regasification unit (FSRU) has just been completed, hence the vessel can be deployed instantly when required. BOTAS said in February it is getting the Vasant 1 FSRU ready for continuous operation over the next 12 months, but may now seek to accelerate start-up. Another BOTAS-run FSRU at Dordyol near the easternmost point of the Mediterranean is already in operation, and the Turkish incumbent also runs the onshore Marmara Ereğlisi LNG terminal.

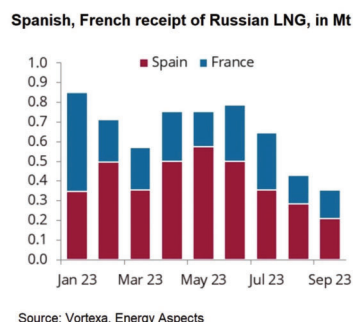
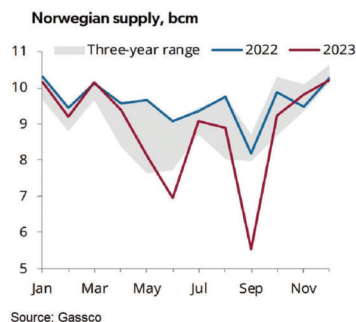
Striving to turn Turkey into a regional gas hub for supplying Russian gas and LNG onwards to south-east Europe, BOTAS signed a

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Curtailed Troll output rolls into early October, bolsters TTF gas prices

Maintenance of the Norwegian Troll field and additional works at Skarv field are sharply reducing Europe's ability to inject gas into storage and bolster prices at the Dutch TTF gas trading hub. Energy Aspects reckons the prolonged maintenance results from field trips given how hard they have been running, or because Equinor wants to defer output into higher-priced years.

Cuts in Norwegian supplies restrain the use of floating LNG and Ukrainian storage over the coming week, hence less supply will be available over the November-December period. The extent of additional maintenance made analysts revise down their Norwegian production estimates, even though Energy Aspects had been factoring in 3 bcm of lost supply in August–October due to Equinor deferring output. Estimates for deferred output over September and October were cut to 0.2 bcm and 0.3 Bcm, respectively.



Russian LNG risks deemed "overblown"

The tightening effect of Troll and Skarv maintenance had a bigger effect on TTF prices than fears about possible strikes of Australian LNG workers and concerns about Russia curtailing

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long-term deal with Bulgargaz which allows Bulgaria to import about 1.5 Bcm of gas a year in return for booking regas slots for about 1 Bcm/y at Turkish LNG terminals. In recent days, BOTAS signed an agreement

with Moldova for the supply of 2 million cbm of gas per day, starting on October 1.

Ege Gaz, the first private sector investor in the Turkish gas market, operates the Izmir Aliaga regasification terminal which

adds competition and alternative supply to the market. Another independent player, Pardus Energy, has stationed the Turquoise FSRU offshore Etki, a small town close to Izmir. ■

Energy transition threatened by shortage of rare-earth minerals

Lack of funding for new mining projects could create shortages of 20-50% of rare earth metals and minerals that threaten the success of the energy transition, McKinsey warns. Rising interest rates and less available finance made mining companies cut investment, with sector spending falling to around \$40 billion in 2022, despite soaring demand.

EV batteries and chargers alone are anticipated to consume over 50% of all available cobalt and rare-earth elements and 36% of nickel resources by 2030. Recycling could help recover some 10% of supply for minerals such as copper, lithium, and nickel by 2040.

McKinsey analysis shows commodity trading pools have nearly doubled year over year, reaching nearly \$100 billion in 2022 and metals and minerals will make up Mean increasing share of the value pool in the coming years. "Traders can capitalize on this opportunity by supporting increased liquidity and price discovery in rapidly evolving metals and minerals markets," Roland Rechtsteiner, partner at McKinsey said, suggesting commodity trading has grown more than 170% in value in just three years.

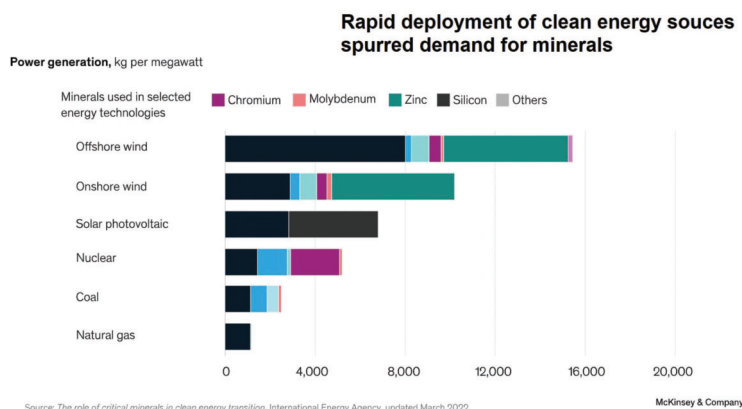
Yet investors are currently reducing funding for new mining projects due to low commodities prices and long lead times for new mines, exacerbating supply chain shortages for green technologies. "Mines take an av-

erage of up to 15 years to become operational and some projects planned today wouldn't begin production until about 2040," said Spencer Holmes, associate partner at McKinsey.

Concentrated supply-chains

Available supply mostly originates from China which already in 2009 reached a 98% in global supply of rare earth. Chinese company also quickly set up supply chains for other minerals vital for clean energy sources and now processes more than 40% of materials across most categories.

China's dominant position in clean energy supply chains means it could have an outsize impact on the market, analysts warn. Similarly, emerging electro states—for example, Australia (lithium), Chile (copper), the Democratic Republic of Congo (cobalt), and Indonesia (nickel)—could influence the market for their respective minerals. ■



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LNG shipments to Europe. "Australia LNG

risks have largely subsided, although not gone completely, and Russian LNG risks are overblown," analysts commented.

Though Russia put a ban on diesel exports to alleviate domestic supply shortages and price spikes, analysts expect no spill-over into Russia banning LNG exports to Europe. On the other hand, there is a low risk that the European Union bans Russian LNG before the next big wave of super-chilled gas enters the market by 2026.

France and Spain do not support a ban on Russian LNG, given that they have been receiving around 0.3 Bcm per month and 0.5 Bcm/m, respectively, over recent months. TotalEnergies holds 4 mtpa of off-take from Yamal LNG and CEO Patrick Pouyanne recommended this month that France should not ban Russian LNG until "later this decade." Spanish Ecological Transition Minister Teresa Ribera agreed by saying that a ban on Russian LNG would be

"too challenging in the near future."

Demand losses in 2024

Another mild winter could bring down TTF prices for 2024 delivery towards the lower end of the coal-to-gas fuel switching range of €26 to €56/MWh. These days, the TTF is already hovering around the 15-ppt coal-to-gas fuel-switch trigger and analysts expect not much gas will be liberated from power generation up at the 20-ppt trigger.

Demand losses from sectors like industry and residential customers, that are less price-elastic than the power gen sector, are on the cards: the gas-intensive businesses are likely to keep their gas demand heavily curtailed, analysts reckon. This may limit Europe's requirements for spot LNG cargoes, while other buyers with high spot requirements in South Korea, Japan and Taiwan can compete at high prices with European utility buyers. ■

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Europe approves over €100m in state funding for Greek FSRU terminal

The European Commission has approved €106 million Greek public support to ensure construction of the Alexandroupolis floating storage and regasification unit (FSRU) will be completed as planned by year-end. The FSRU is meant to become an “energy gateway” for southeast Europe and ensure gas supply for power generation, with Greece’s Gastrade looking to line up first suppliers.

The latest cash injection, greenlighted under EU state aid rules, adds to a previous €166.7 million funding that the Greek state awarded to the project in 2021, also under state aid regulation given that the venture is listed as an EU Project of Common Interest.

Gastrade, the project sponsor and operator, will directly receive the latest tranche of funding with the obligation to bring the FSRU into operation before the start of 2024. The Commission deems the project vital to secure gas supply for industry and electric utilities in Greece and Southeast Europe following the reduction of Russian pipeline gas deliveries.

The Greek shipping company GasLog committed to design, build and deliver the physical FSRU by the end of 2023. Works to develop Greece’s first floating regas unit started at Keppel shipyard in Singapore with the conversion of the LNG carrier Gaslog Chelsea, recently renamed as Alexandroupolis.

The FSRU, set to be moored about 18 kilometres off Alexandroupolis port, will consist of a floating storage and regas unit with capacity of 5.5 billion cubic metres per year



LNG carrier Gaslog Chelsea was converted into FSRU Alexandroupolis

(Bcm/y) of natural gas. It will regasify LNG and carry the natural gas onshore via a 28 km pipeline to be built by Corinth Pipeworks. Svitser, part of Moller-Maersk, will service the unit over a period of fifteen years and provide station-keeping services during installation.

Request for second FSRU permit

Gastrade has also submitted to the Regulatory Authority for Energy (RAE) an application for a new Independent Natural Gas

System (INGS) License, for another project “Thrace LNG”, which will also consist of an FSRU will be developed near the first FSRU at the Sea of Thrace, also offshore Alexandroupolis.

GasLog CEO Paolo Enoizi underlined the “tragedy currently unfolding in Ukraine has highlighted the importance of LNG.” Energy security can only be delivered and ensured by “substantial infrastructure investment,” he said which “nowadays comes at a cost and a delivery time.” ■

European buyers shy away from ‘onerous US contracts’

A big build-out is underway in North America where Poten & Partners are tracking about a dozen projects with a combined capacity of roughly 100 mtpa that are actively under construction and have secured financing. But what discourages the Europeans from signing what they consider as ‘onerous contracts’ is that there is just a lot of volume that are offered a longer tenure and higher price than they are comfortable with.

Beyond the 12 projects under construction, there are 19 projects in the US and Canada and Mexico that are permitted but have yet to secure financing – but very little of that volume is coming online this year. “We only have one project by an American company, New Fortress Energy who are planning to place an offshore LNG project into service in Mexico – Altamira Tamaulipas – that is just 1.4 mtpa,” Poten’s senior LNG analyst Americas, Sergio Chapa said, suggesting: “We could see a cargo out – Mexico’s first LNG export cargo – by the end of this year.”

Until the bulk of additional US supply is coming onstream in 2026, price’s at Europe’s most liquid gas hub – the Dutch TTF

– are becoming incredibly volatile and overreactive. This was noticeable with the latest Australia strikes situation and the prolonged maintenance of Norwegian gas fields.

Wait-and-see approach

There is a 2-year window where a lot of traditional LNG trading houses that are short on volume are happy to rely on the spot market due to the expectation that TTF prices will take a bearish turn through 2026 as more supply comes to Europe, Poten’s senior LNG analyst Europe Piers de Wilde explained. Once US LNG expansions will actually come through, there will be even more short-term contracts that are

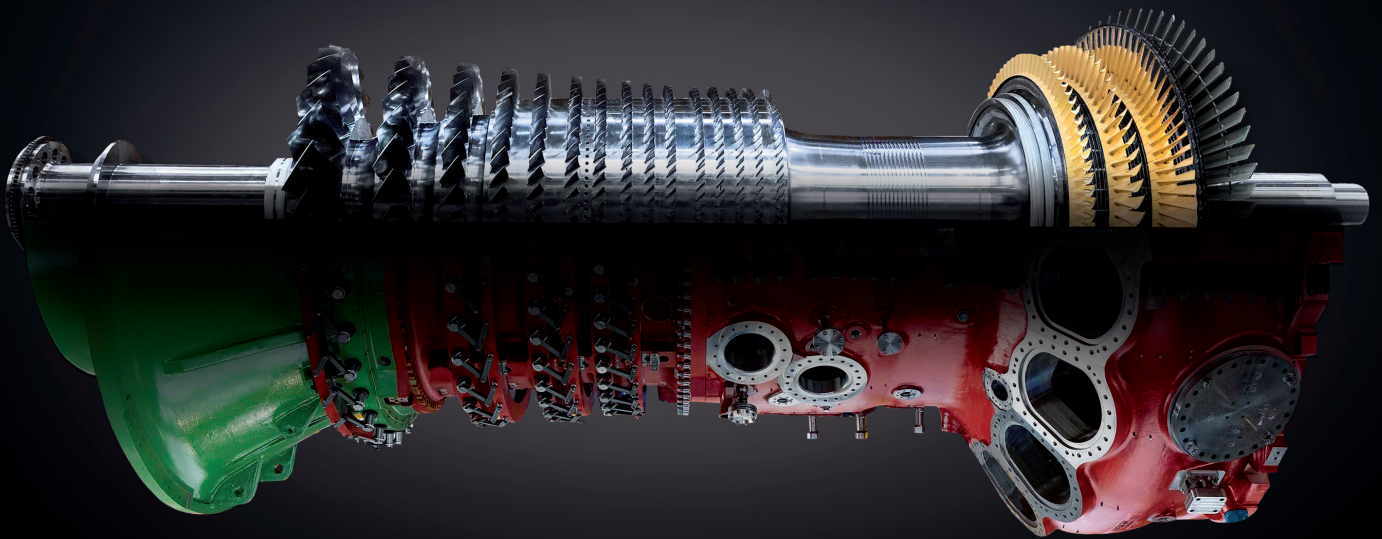
cheaper value. “This notion creates a ‘wait-and-see approach’ although developers would need a 20-year offtake commitment to get their project off the ground to cover inflation and rising liquefaction costs,” he warned.

Moreover, portfolio sellers are no longer willing to offer US LNG volumes at a discount to TTF. Typical deals before Russia’s war on Ukraine used to be 89% of TTF prices minus 10 cents. “Now, if the aggregators put 15-year supplies into Europe they want higher prices and that’s just a formula for the Europeans to lose money when they sell that gas on,” Poten’s global LNG head Jason Feer said, concluding: “You don’t see much common ground there.” ■

— ITALIAN ENERGY —

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India to lead Asia's \$3.3tn investment in power gen over next decade

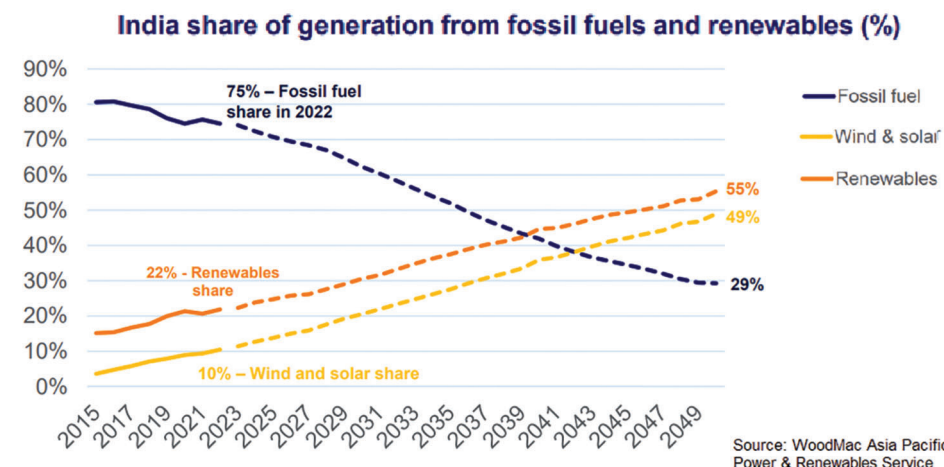
India, Asia's most rapidly growing power market, will spearhead the region's forecast \$3.3 trillion investment in power generation over the next 10 years – with emphasis on the cheaper options of coal and renewables. Wood Mackenzie anticipates the region will add 1,840 GW of new capacity in the next five years, more than the rest of the world combined.

The Asia Pacific region is critical to the power sector's energy transition as it grows to over half of global electricity demand this year. India and China are at the forefront of renewables growth, but are also leading the world in coal power deployments," Alex Whitworth, Head of Asia Pacific Power & Renewables Research at Wood Mackenzie, told a conference in Uttar Pradesh.

Though India already overtook Japan a decade ago as Asia's second largest power market, its growth potential is still vast. "Power demand doubled in the last 12 years, an achievement we could very well see again as strong economic growth continues over the next 12," he reckons.

Peak coal on the horizon

Home to some of the lowest cost renewables in the world, India rapidly developed large-scale wind and solar project which pushed the country's renewables share of power generation to 22% in 2022. But despite a 2070 carbon neutral target, India is still investing heavily in new coal power to support economic growth, with a pipeline of over 50 GW of projects planned



and under construction.

"Currently, fossil fuels (mainly coal) still provide 75% of India's power supply but that share is declining steadily. Impressively, India's per capita power sector emissions are expected to peak in the next decade at a level less than half of where most western markets were at a similar level of development," Whitworth pointed out.

But it may well not be enough. In the next decade alone, India will need \$350 billion in power generation investment to meet growing power demand, according to

WoodMac projections. While cheap renewables and technology advances herald a continued renewable build-out in India, Whitworth cautioned the speed of growth hinges on grid investments and the reform of pricing mechanisms to attract investment.

Power sector CO₂ emissions in India soared from 850 million tons in 2015 to an estimated 1,200 mt in 2023, and this figure is expected to rise further to 1400 Mt by 2030. Renewables, combined with energy storage, are hence key if the country wants to transition to a low carbon power system.

Georgia Power issues RFI for storage or thermal generation

US regional utility Georgia Power is projecting for more future capacity than expected and issued a Request for Information (RFI) on energy storage systems with a renewable resource or thermal generation (gas-, oil-fired). Each resource would need to be firm, over 100 MW in size and not exceed 1,200 MW, with manufacturers asked to submit responses by October 24.

Firm resources are ready to be dis-

patched at all times to cover peak power demand, which is vital for US utilities like Georgia Power in the face of rising supply of fluctuating wind and solar power. In its 2022 Integrated Resource Plan (IRP), the utility estimated a need of about 3,723 MW of power generation capacity through winter 2031. Now, it projects much greater needs for firm capacity and sooner.

Striving to meet future demand, Georgia Power seeks information about available capacity resources for its future resource planning – hence the RFI differs from a request for proposals (RFP) which is often directly followed by an order. If standalone energy storage systems will be submitted in the RFI, they need to have grid-charging capability as well as those which are paired with

a renewable resource, the utility stressed.

Fast-tracking 100-hour iron-air battery

Pioneering innovative battery technology, Georgia Power is working with energy storage developer Form Energy to deploy a 15 MW/1500 MWh iron-air battery system. The multi-day battery could last up to 100 hours and is expected to come online as early as 2026.

Committed to shift to a cleaner energy mix, Georgia Power said it planned to evaluate opportunities in the 5-15 MW range, also based on iron-air batteries. The technology delivers electricity for 100 hours at a price of less than \$20/kWh which is said to be competitive with conventional power plants and at less than 1/10th the cost of lithium-ion.



Hydrogen exports to shift to ammonia by 2035; Rystad reckons

As hydrogen gains prominence, many infrastructure projects are considering transporting the clean fuel in the form of ammonia which is safer and more cost-effective to ship in large quantities. Rystad Energy expects 174 export terminals will convert H2 into ammonia by 2035, accounting for 62% of total exported volumes or about 13.5 mtpa.

Overall traded volumes of ammonia could reach 76 million tons by 2040 – four times the volume transported in 2020.

Supply will primarily originate from Africa and North America, while nations like Japan and Germany will be among the largest buyers as they have adopted national hydrogen strategies to pave the way for co-firing H2 in gas power stations.

Today, there are 220 ammonia infrastructure projects globally, with a combined handling capacity of more than 6 million tonnes. Come 2050, ammonia export might well increase to 121 million tons, with Africa contributing 40.7 mtpa and Australia with 35.9 mtpa based on announced projects.

"With the ammonia trade booming, there is an urgent need to leverage existing assets to their fullest potential. Converting LNG terminals could be a good solution, not only optimizing current infrastructure but also spurring a re-evaluation of strategies that can cope with the scale of the expected market expansion," said, Rystad's head of hydrogen research, Minh Khoi Le.

Japan pioneers NH3 co-firing

JERA, Japan's largest LNG importer and power producer, has just initiated a tender to secure an annual supply of up to 500,000 tonnes of ammonia, starting from 2027. This move is aimed at supporting coal generation co-firing applications within Japan and has involved active negotiations with ammonia producers such as CF Industries and Yara.

AboitizPower is fast-tracking a feasibility study on co-firing ammonia with Japan's largest utility JERA with test runs in the

Philippines scheduled before 2030, assuming the price of the fuel will fall substantially by then. JERA is preparing to start a 20% ammonia generation test in Japan already this year, aiming for 50% co-firing by 2028.

As one of the Philippines' largest utilities, AboitizPower is partly owned by JERA and the Japanese major wants to roll out a similar concept in both island nations. "Though renewables plus batteries are technically feasible but the cost for batteries to maintain a stable power supply would be huge. Instead, utilising existing thermal power plants and co-fire them with ammonia makes better economic sense," explained Shinsuke Nakayama, head of JERA's Asia Platform Business.

By 2030, JERA wants to import some 2 million tons of ammonia per year to decarbonise its power stations. Co-firing is currently tested at Hekinan No.4 coal power unit where JERA aims for full ammonia combustion by 2050, with most of the clean-burning fuel to be sourced from Norway, the U.S. and Australia. Two memoranda were sealed in recent months for JERA to buy up to 500,000 tonnes of clean ammonia per year both from Yara's and CF Industry's existing production site. In addition, JERA is considering to invest into CF Industries proposed greenfield clean ammonia facility in Louisiana and is looking to co-produce ammonia with Year in the US Gulf region.

Investing into ammonia carriers and terminals

To import ammonia, the Japanese technology conglomerate IHI is looking into modifying LNG receiving terminals to be able to

also handle the clean fuel, slashing import costs. The shipping firms MOL and NYK have agreed to transport ammonia as a fuel to JERA's Hekinan thermal power plant from the late 2020s.

Today, just 30% of the global liquefied petroleum gas (LPG) fleet can transport ammonia, with only 50 large and very large gas carriers having this capability. To meet rising demand, Singapore-based Eastern Pacific Shipping has commissioned four very large ammonia carriers (VLACs) from Jiangnan Shipbuilding Group. But to transport the announced 121 million tonnes of ammonia, Rystad analysts reckon that approximately 200 VLACs will be required, necessitating an investment of approximately \$20 billion in newbuilds.

NEWS NUDGES

DOE to fund Mistral energy storage

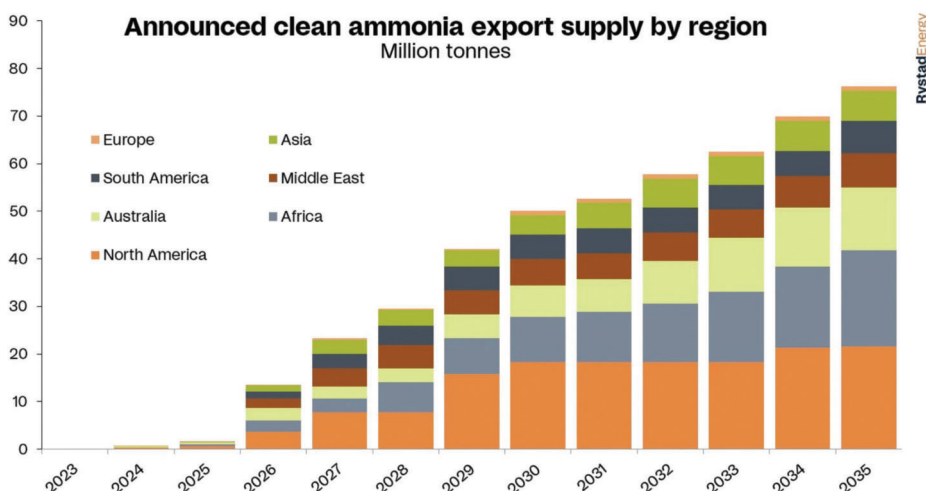
The United States Department of Energy (DOE) plans to fund projects that will use 84 MWh of Invinity's next-generation product, code-named Mistral, in six sites across the country. The projects were selected because they can deliver stored electricity for a period of 10 hours or more and are deemed vital for turning variable wind and solar production into a reliable, round-the-clock power source.

EVE to supply Wärtsilä with battery cells

Wärtsilä has signed a multi-year supply agreement with the battery cell maker EVE Energy. Lithium Iron Phosphate (LFP) battery cells, made by EVE, will be integrated into Wärtsilä's GridSolv Quantum energy storage which has a 100% safety record.

Sembcorp signs PPA with Telemedia

Sembcorp has signed a long-term power purchase agreements (PPAs) with Telemedia Global Data Centres to power its data centres in Singapore. Under the accord, Sembcorp will supply the data centres with up to 100 MW of electricity over a contract period of between eight to 10 years.



NFE places US-gov' sponsored power plant in service in Puerto Rico

New Fortress Energy (NFE) has placed into service its second US government-sponsored power plant in Puerto Rico. Situated in San Juan, it has a capacity of 200+ MW and operates under 2-year contract whereby the government pays for fuel, logistics and all infrastructure – similar to the 150 MW facility in Palo Seco that started up in June.

By sponsoring fast-ramp, open-cycle power plants in Puerto Rico, the American government is seeking to ensure stable electricity supply for industry and households in its unincorporated overseas territory. Ensuring energy security is a way of maintaining social stability.

Construction and installation of these two plants were carried out "In record time," according to Brannen McElmurray, CEO of Genera PR, an independently managed subsidiary of NFE. The two plant are meant to provide reliable and efficient electricity to the Puerto Rican market, enhancing grid reliability.

In addition to placing Puerto Rico power plants in service, NFE reached another milestone on September 26 when the third and final rig of FLNG 1, Pioneer II, sailed away from the Kiewit shipyard in Ingleside, Texas. This rig will soon join the other two FLNG 1 rigs in Altamira for final installation and commissioning, with target commercial operations date (COD) in late October or early November.

Enhanced earnings from Q4-23

Wes Eden, NFE's chief executive singled out the COD of the San Juan power plant and the near-commissioning of the final FLNG 1 rig in Altamira as "an inflection point" for the company: "The combination of the San Juan plant and the Palo Seco plant contribute significantly to downstream volumes and terminal earnings beginning in size in the fourth quarter of 2023.

"Our projects are entering service after years of buildout, and we now look forward to cash generation, deleveraging, and organic growth opportunities," Eden said.

Analysts at the ship brokerage Poten & Partners are tracking about a dozen projects with a combined capacity of roughly 100 million tons per annum (mtpa) that are actively under con-

struction and have secured financing. However, very little of that volume is coming on-line this year – except NFE's venture in Altamira Tamaulipas – "but that is just 1.4 mtpa," Poten's senior LNG analyst Americas, Sergio Chapa noted, suggesting: "We could see a cargo out – Mexico's first LNG export cargo – by the end of this year but in the absence of a non-FTA permit option are limited as where it could be sent." ■



Old San Juan from the air

Mitsubishi to supply second turbine to Oklahoma's Grand River OCGT

Mitsubishi Power has been selected to supply a second M501 JAC gas turbine for Unit 4 at the 1,194 MW Grand River Energy Center in Chouteau, Oklahoma, replacing the plant's last remaining coal-fired unit. It will be the first M501 turbine to run in open-cycle mode in the US, while another J-series turbine is powering the plant's 500 MW combined-cycle Unit 5.

Construction on the Unit 4 is scheduled to start in January 2024, with the unit expected to be operational in open-cycle mode by April 2026. Open-cycle, or simple-cycle mode, is a configuration whereby tur-

bine runs one single thermodynamic cycle which provides greater operational flexibility and faster start-up times to balance the grid in the face of fast-rising, fluctuating renewable energy supply.

Dan Sullivan, CEO of Grand River Dam Authority (GRDA) – Oklahoma's largest public utility – hailed its "long, proven history" with Mitsubishi Power which also installed a J-series gas turbine at the plant's Unit 3. This turbine, in contrast, runs in combined-cycle mode since 2017 and, according to the operator, has been "setting a new

standard for efficiency and reliability."

Replacing coal-fired generator, with H2-ready gas turbine

The M501JAC air-cooled gas turbine for Unit 4 will replace the Grand River Energy Center's Unit 2, a 492 MW coal-fired generator that came online in 1985. Retiring these aging and less efficient coal-fired plants and replacing them with cleaner-burning gas units helps reduce emissions and boosts efficiency, the operator said.

The M501 JAC gas turbine, to be installed at Unit 4, is hydrogen-capable and is meant to be adapted in the future to run fully on zero carbon fuel. "By replacing its coal-fired units with our advanced J-Class gas turbines, including Unit 4's hydrogen-capable turbine, GRDA is demonstrating its continuing commitment to cleaner, more flexible and reliable energy production," Bill Newsom, CEO of Mitsubishi Power Americas commented. ■



Oklahoma's Grand River Energy Center

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