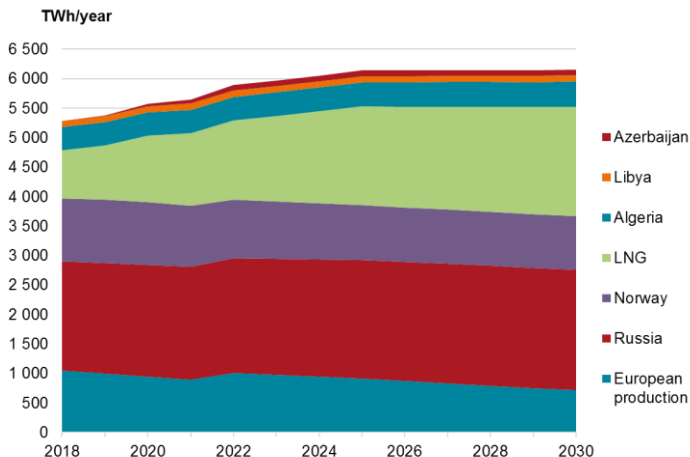




European supply capacities forecasts up to 2030



Source: ENTSOG (2018)

Description:

This graph represents ENTSOG's forecasts for European supply capacities of natural gas up until 2030. LNG supplies do not differentiate the exporting countries. Algerian supplies are mixed (LNG and pipeline supplies).

Analysis:

European natural gas production is expected to decline by 30% until 2030. This intra-European sourcing for natural gas should be compensated by the growing imports capacities from exporting countries thanks to new streams of supplies. LNG technologies are expected to play a key role in the European strategy for energy supplies.

To this end, Europe is relying on new LNG terminal projects.

Similarly, investments in transmission infrastructures would allow negotiations with new suppliers as it is the case with Azerbaijan whose first natural gas delivery should flow in 2019 or Russian supplies with the new pipeline project Nord Stream II.