



CYNERGY®

# **LNG: the Meeting Point for the Marine, Transport and Energy Sectors**

## CYnergy Section

FCN Gas



Co-financed by the European Union  
Connecting Europe Facility



# Who we are

- FCN Gas was founded in 2016. As part of the Franco Compania Naviera Group, we share significant maritime experience spanning more than 6 decades
- We aim at developing end to end small-scale Natural Gas supply chains in SE Europe
- Our objective is to identify potential users of natural gas, and depending on their energy needs design and develop the most suitable supply chains
- We approach land and sea-based transportation with equal confidence

## Activity 4 – NG for Industrial & Commercial Use

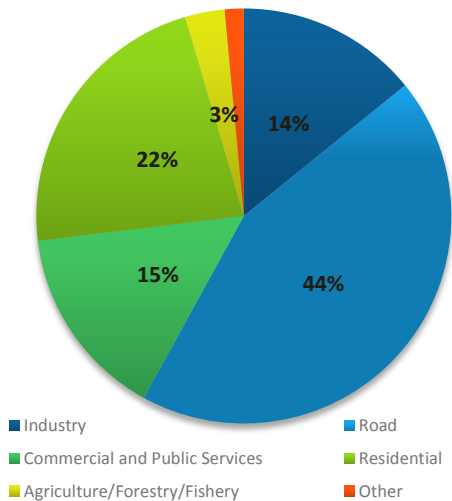
NG offers a competitive, flexible and clean fuel for industrial, commercial and residential use. Within the context of CYNERGY, we will address the strategic, commercial and regulatory aspects of NG use in the above sectors.

In close collaboration with our consortium partners we plan to:

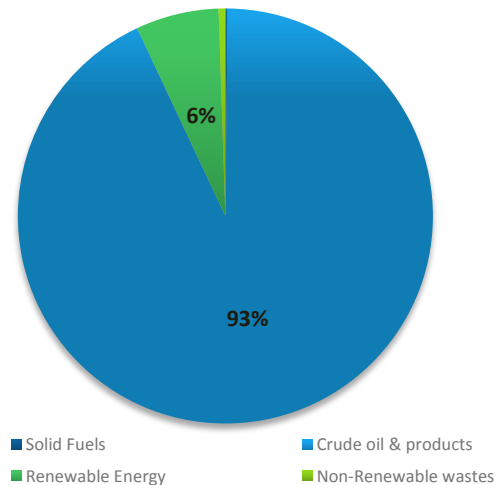
- Assess users specific needs and constraints
- Review Best Practices from existing users and networks in other countries
- Evaluate alternative supply chains and technology options

# Key Figures

Energy Users (non-power)

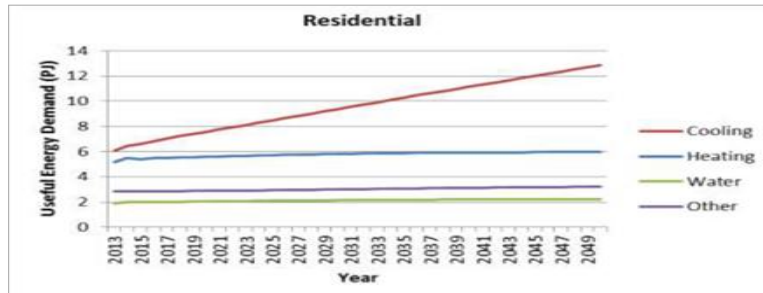
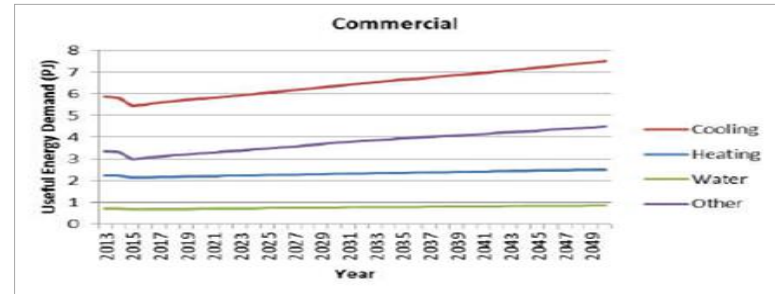
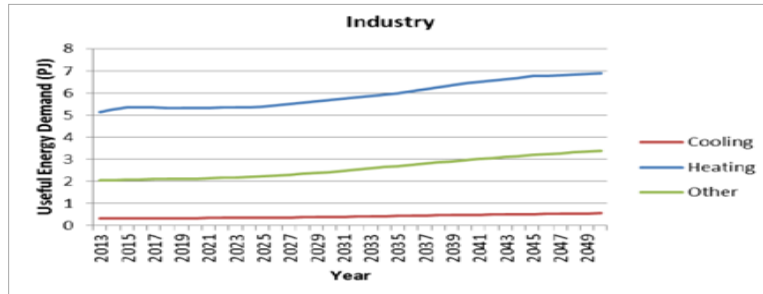


Aggregate Fuel Mix



Source: Eurostat Energy Figures; Data excludes Power and Aviation Sectors

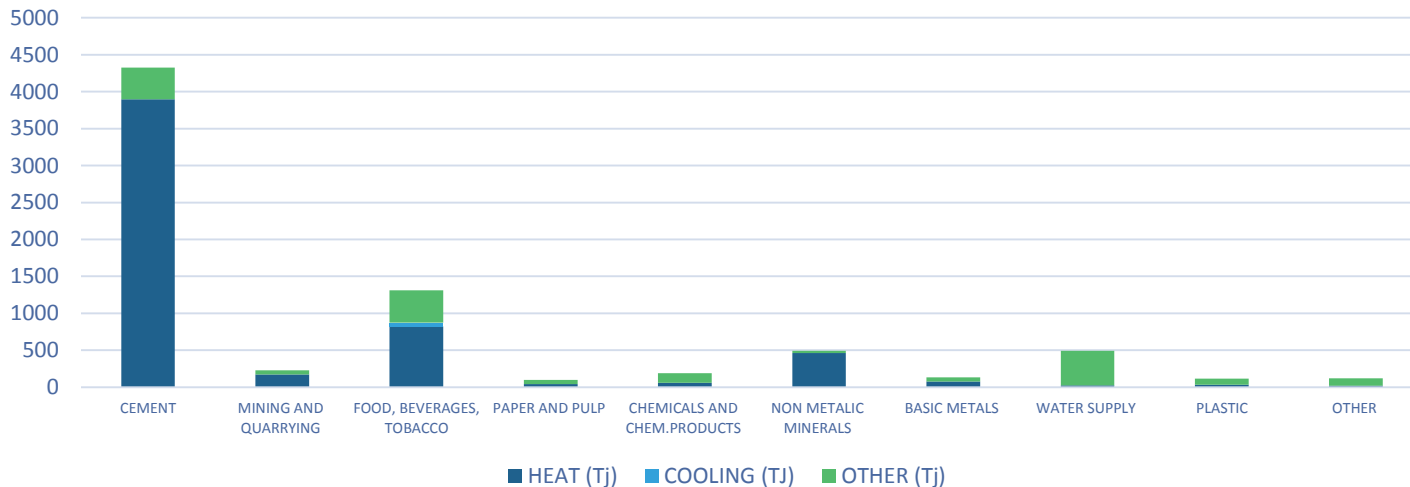
# Energy Demand Projections



- Energy Demand to increase across the board
- Heating and Electricity demand the main drivers for Industrial and Commercial sectors
- Cooling is the main driver for the residential sector

# Breakdown by Sector

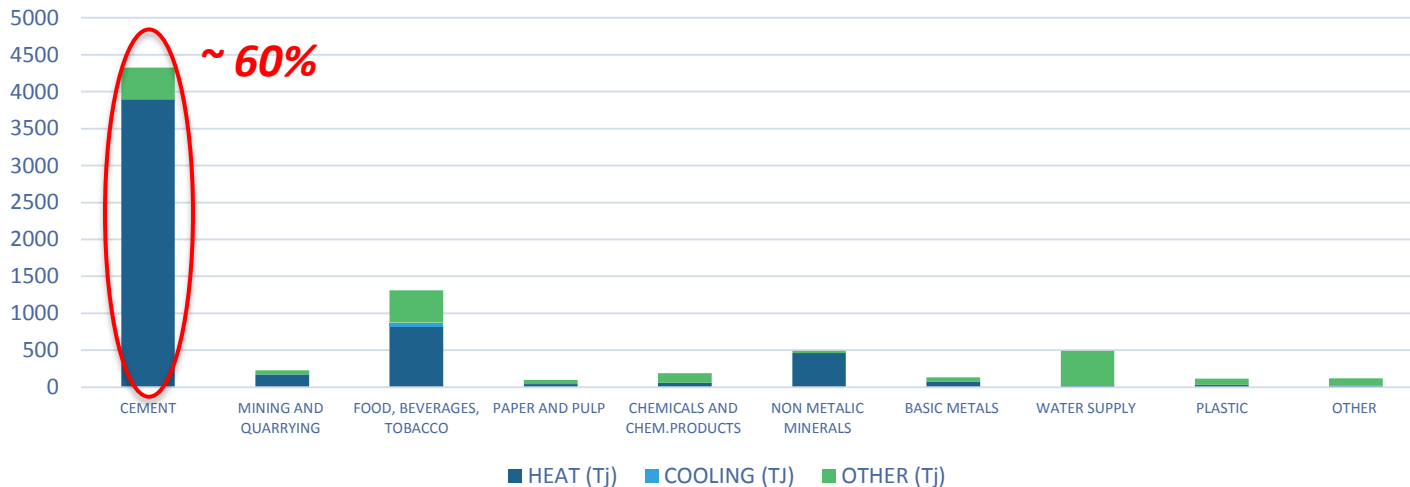
Energy Consumption by Industrial Sector (2013)



Source: European Commission – Joint Research Center

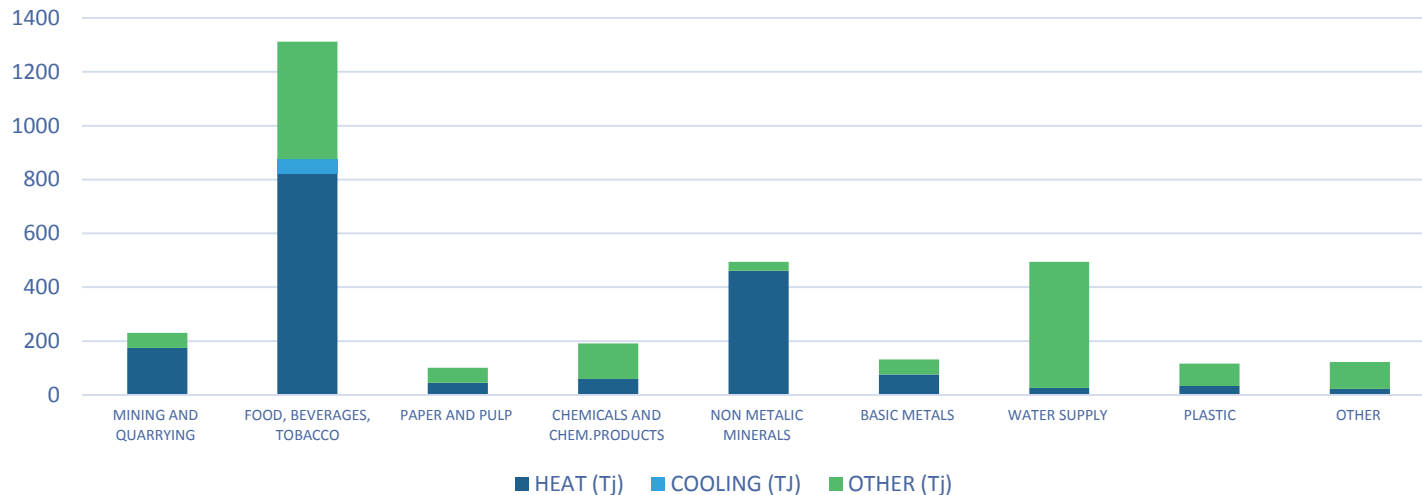
# Breakdown by Sector

## Energy Consumption by Industrial Sector (2013)



# Breakdown by Sector

Energy Consumption by Sector (excl Cement) (2013)

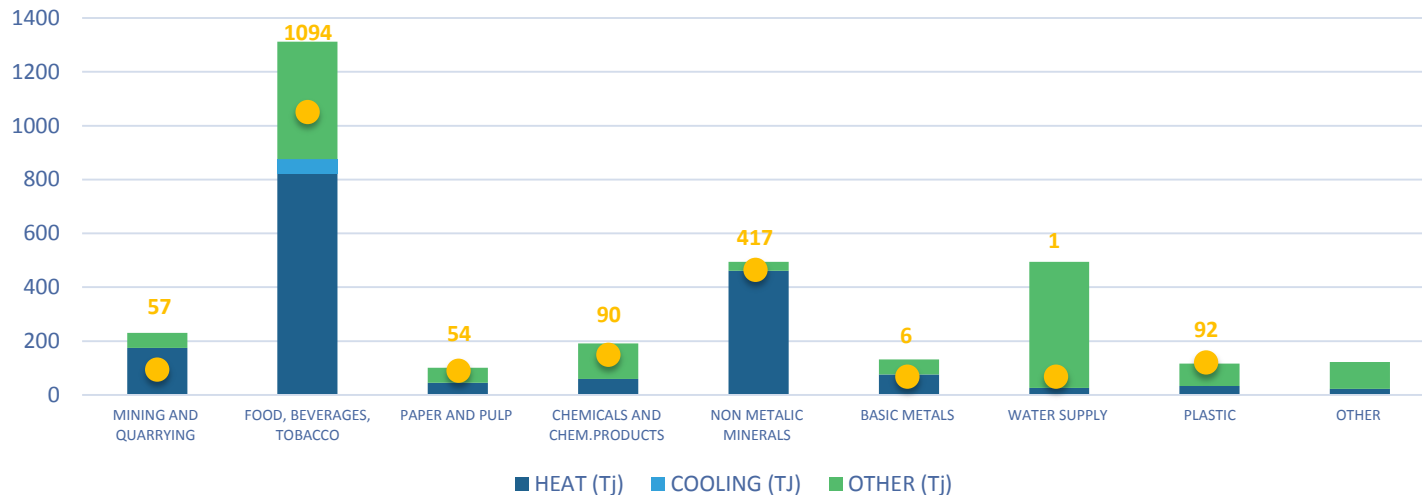


Source: European Commission – Joint Research Center



# Breakdown by Sector

Energy Consumption by Sector (excl Cement) (2013)



Source: European Commission – Joint Research Center

# Supply chain options



Pipeline



CNG



LNG



# Closing Thoughts

- Who and where are the users who can most benefit from Natural Gas?
- Can technology advances in micro-generation (e.g. CHP / Tri-gen) enhance the benefit?
- Are the users best served by permanent or virtual pipelines?
- Can smaller users be pooled to create sizeable “demand-centers” serviceable by small-scale supply chains?
- Can mini-grids served virtually extend the benefit to even more users (e.g. residential)?