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The energy transition: View from a gas infrastructure operator

By

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The energy transition

View from a gas infrastructure operator

Fluxys: gas infrastructure operator (build, own, operate)

Natural gas demand: shrinking in Europe, growing elsewhere

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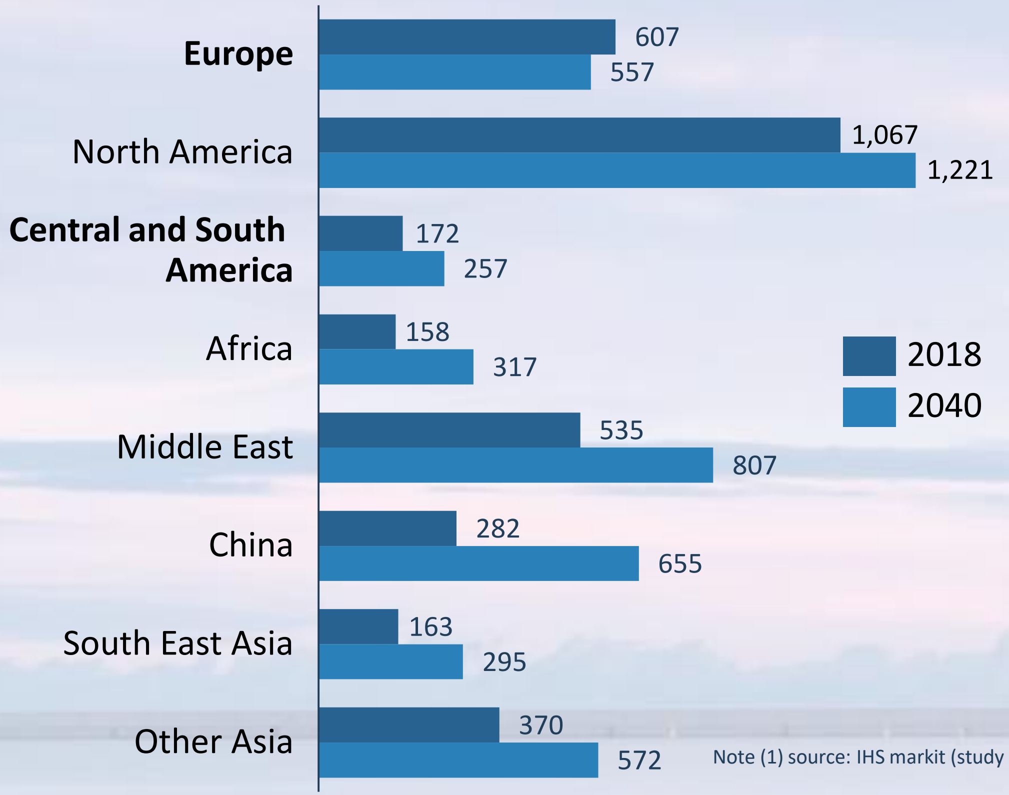
Gas demand by region[1] (bcm)

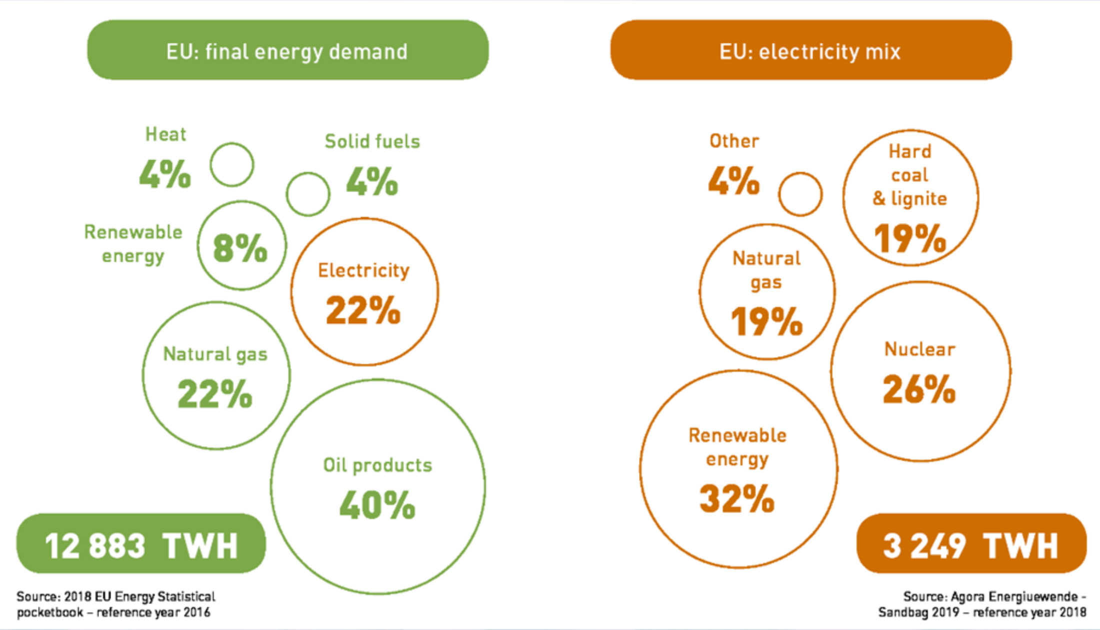


Note (1) source: IHS markit (study 2020)

- Natural gas demand will grow outside Europe to replace oil and coal
- Opportunity for investments in pipelines and LNG terminals outside of Europe
- Opportunity for the development of small-scale LNG projects for industry and transport (heavy trucks, shipping)

Europe : the challenge to decarbonize

Breakdown of European primary energy consumption :



Ca. 1000 GW (capacity)

Electricity generation	Installed capacity 2018 (GW)
Nuclear [1]	120
Natural gas	215
Coal [2]	145
Other non-renewables	45
Hydro	160
Wind	175
Solar	110
Other renewable	10

ca. 50%

(1) France (63 GW), Germany (10 GW)
(2) Germany (45 GW); Poland (28 GW)

Source : Entsoe

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Vision of the future for the gas sector

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Power-to-gas

Hydrogen backbone

Hydrogen import

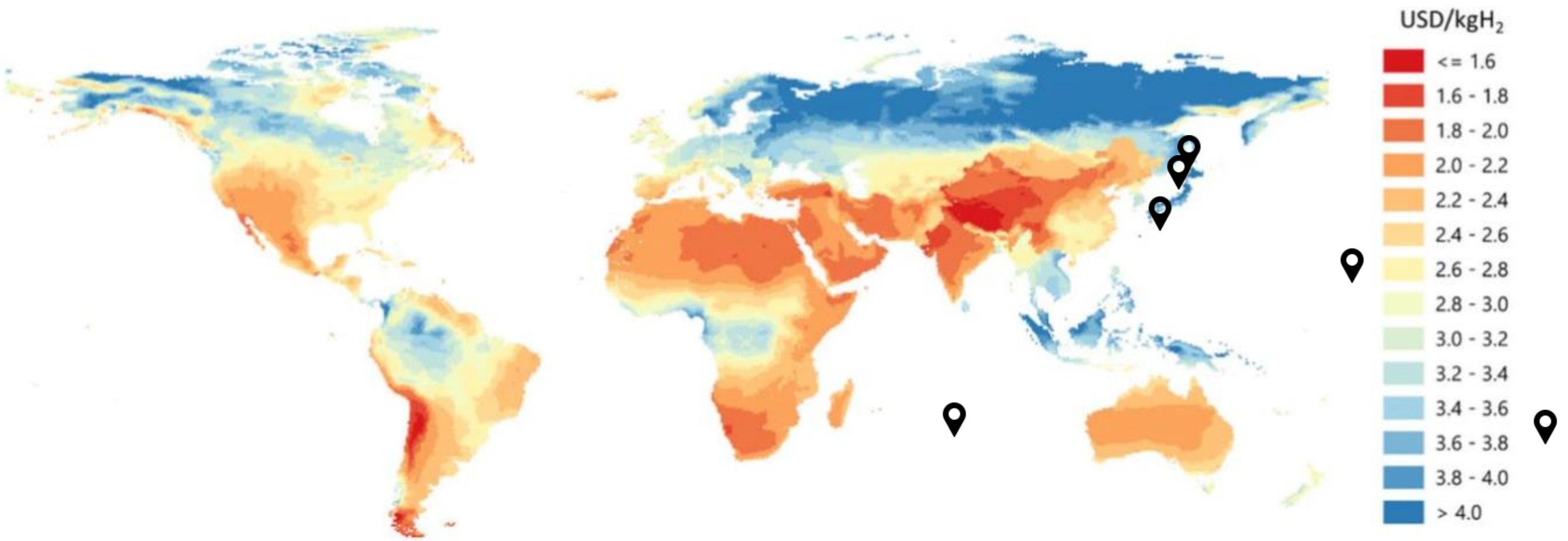
Carbon capture and utilization/storage (CC(U)S)

Heat recovery

Biomethane

Solar and wind energy: a valuable commodity to produce green hydrogen

Hydrogen costs from hybrid solar PV and onshore wind systems in the long term



Source: IEA

Thank you for attention!

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