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## Contents

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# The ups and downs of investment in liquefaction capacity: Cycles or a random walk?

Investment in new liquefaction capacity in the Atlantic Basin seems a doubtful proposition as long as weak US gas prices continue to make the US an unattractive market for LNG. This is a big change from the situation of just a few years ago which saw major new investment in capacity, a significant part of which was to serve the US market. Oil linked prices in Asia, on the other hand, are more attractive even though oil prices have declined from their historical peak a year or two back. Economic growth in new Asian markets continues to drive demand for energy and the focus of attention for new liquefaction capacity is therefore in Asia-Pacific with Australia attracting particular attention at the moment.



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