

Capitalizing on the natural gas supercycle

*Research, intelligence, and insights on global
natural gas and LNG markets through 2050*

Multi-client study prospectus

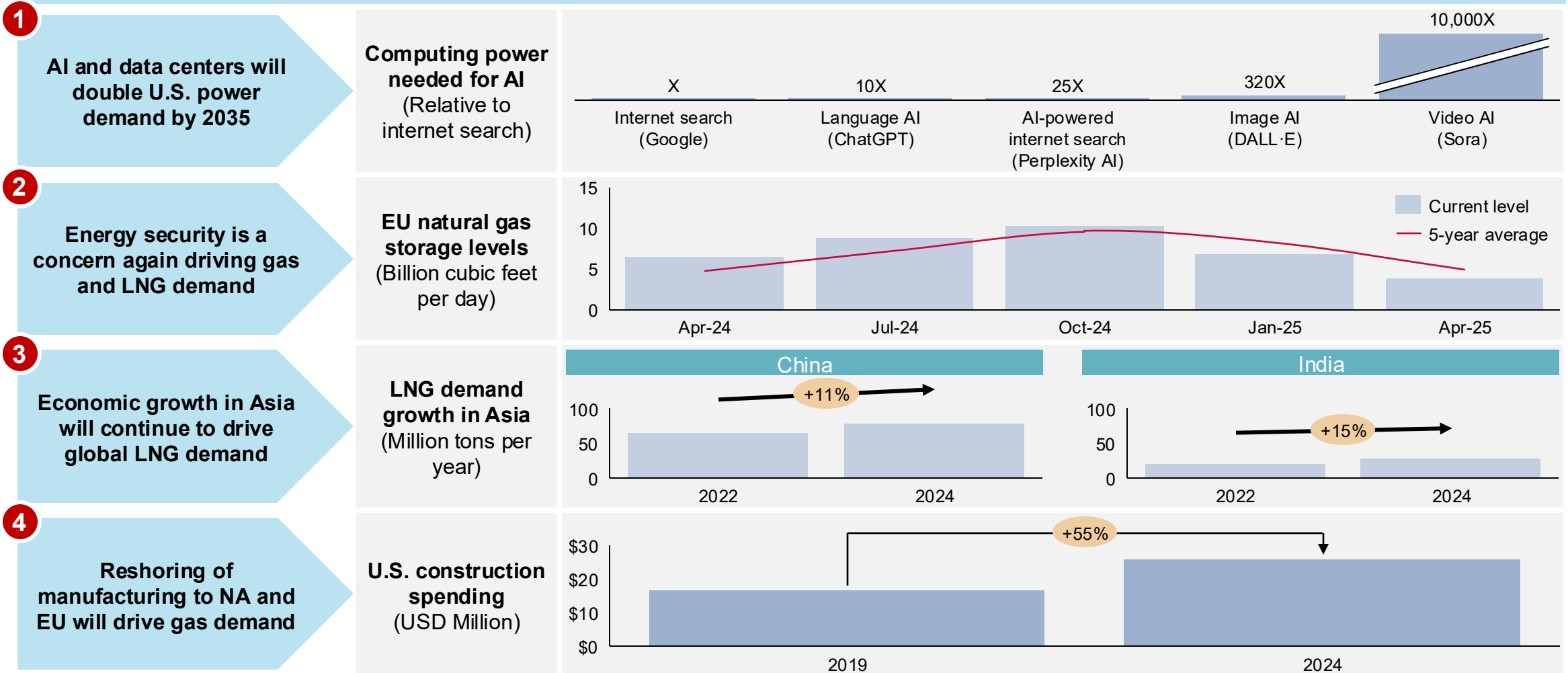
April 2025

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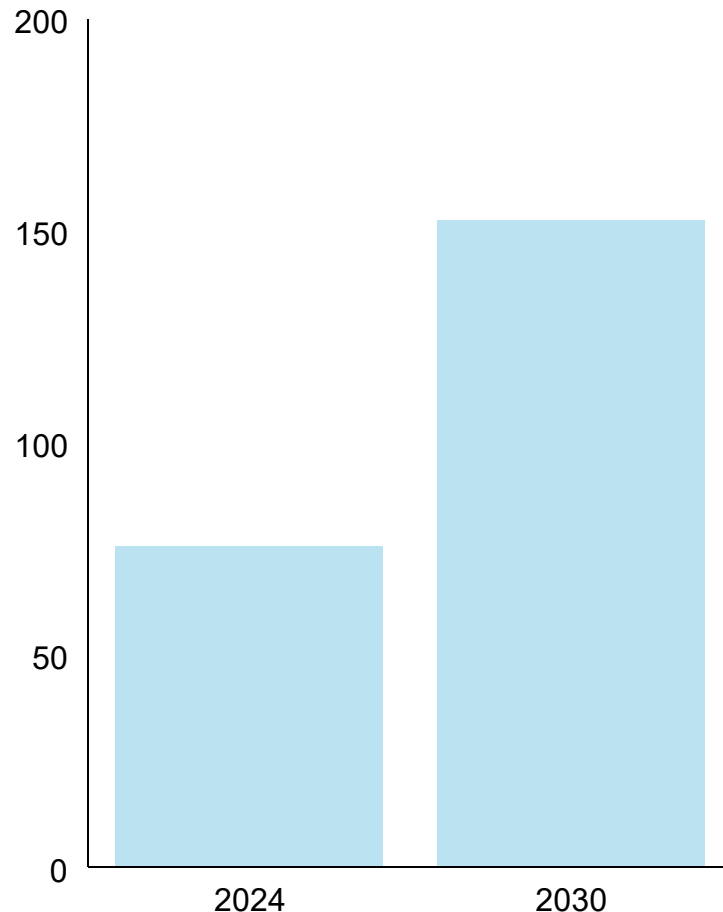
Data centers, AI, energy security, growth in emerging markets, and industrial reshoring in advanced markets drive the gas supercycle

Global drivers for gas and LNG demand

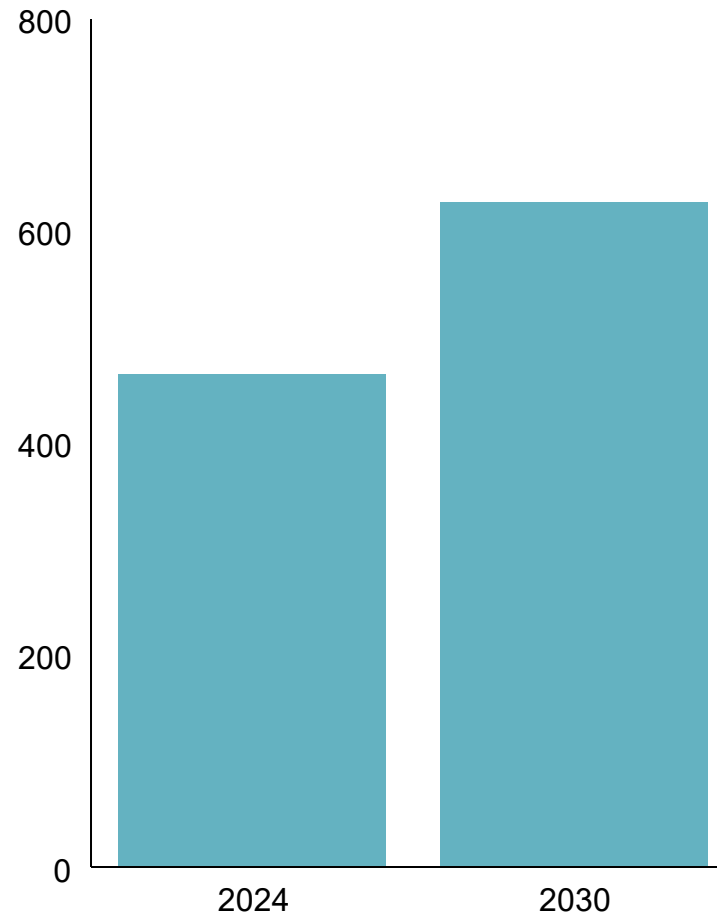


Natural gas demand growth will drive LNG infrastructure additions but the outlook is marred by several uncertainties

U.S. LNG export capacity outlook
Million tons per annum



Global LNG export capacity outlook
Million tons per annum



Discussion

1

LNG price commoditization and contracting changes have impacted returns on LNG projects

2

Rising volatility in permitting, tariffs, and policy intensify uncertainty around long term profitability of an LNG export project

3

Cost inflation and labor shortages have made capital costs and timelines unpredictable

ADI's multi-client study will answer several critical questions for natural gas and LNG stakeholders to capitalize on this supercycle



ADI is proposing a preliminary table of contents that subscribers will have the opportunity to refine with their input

1	Executive summary <i>Key conclusions, findings, and strategic implications</i>	6	Deep dives in global natural gas and LNG supply <i>Analyze natural gas and LNG supply projects, with key drivers, trends, and implications</i>
2	Global natural gas and LNG demand drivers <i>Identify factors and potential demand shifts influenced by market conditions, infrastructure investments, regulations / policies</i>	7	Global natural gas and LNG supply outlook to 2050 <i>Forecasts for global gas and LNG supply through 2050, focusing on key regions and sectors</i>
3	Policy landscape <i>Global policy and regulatory analysis covering flaring, methane emissions restrictions, energy security, and sustainability in the LNG value-chain</i>	8	Cost and economic analysis <i>Breakeven costs and economics of natural gas and LNG in key regions</i>
4	Deep dives in data centers, energy security, demand growth in emerging markets, and manufacturing reshoring <i>Profile, quantify, and analyze key demand segments</i>	9	Stakeholder opportunities and risks analysis <i>Strategic analysis of opportunities, challenges, and options for all stakeholder groups</i>
5	Global gas and LNG demand outlook to 2050 <i>Forecasts for global gas and LNG demand through 2050, focusing on key regions and sectors</i>	10	Strategic implications and opportunity analysis <i>Findings and conclusions, strategic implications, risks and mitigation strategies, and opportunity analyses for gas and LNG suppliers</i>

Subscribers can customize their access to our study deliverables

Options for regional coverage and deliverables that subscribers can select from

	Global				North America			
Deliverables	Report only (~150 pages)	Report + data	Report + data + workshop	Four quarterly updates through 2026	Report only (~150 pages)	Report + data	Report + data + workshop	Four quarterly updates through 2026
Pricing	\$14,500	\$17,000	\$19,500	\$25,000	\$8,500	\$10,000	\$12,500	\$15,000

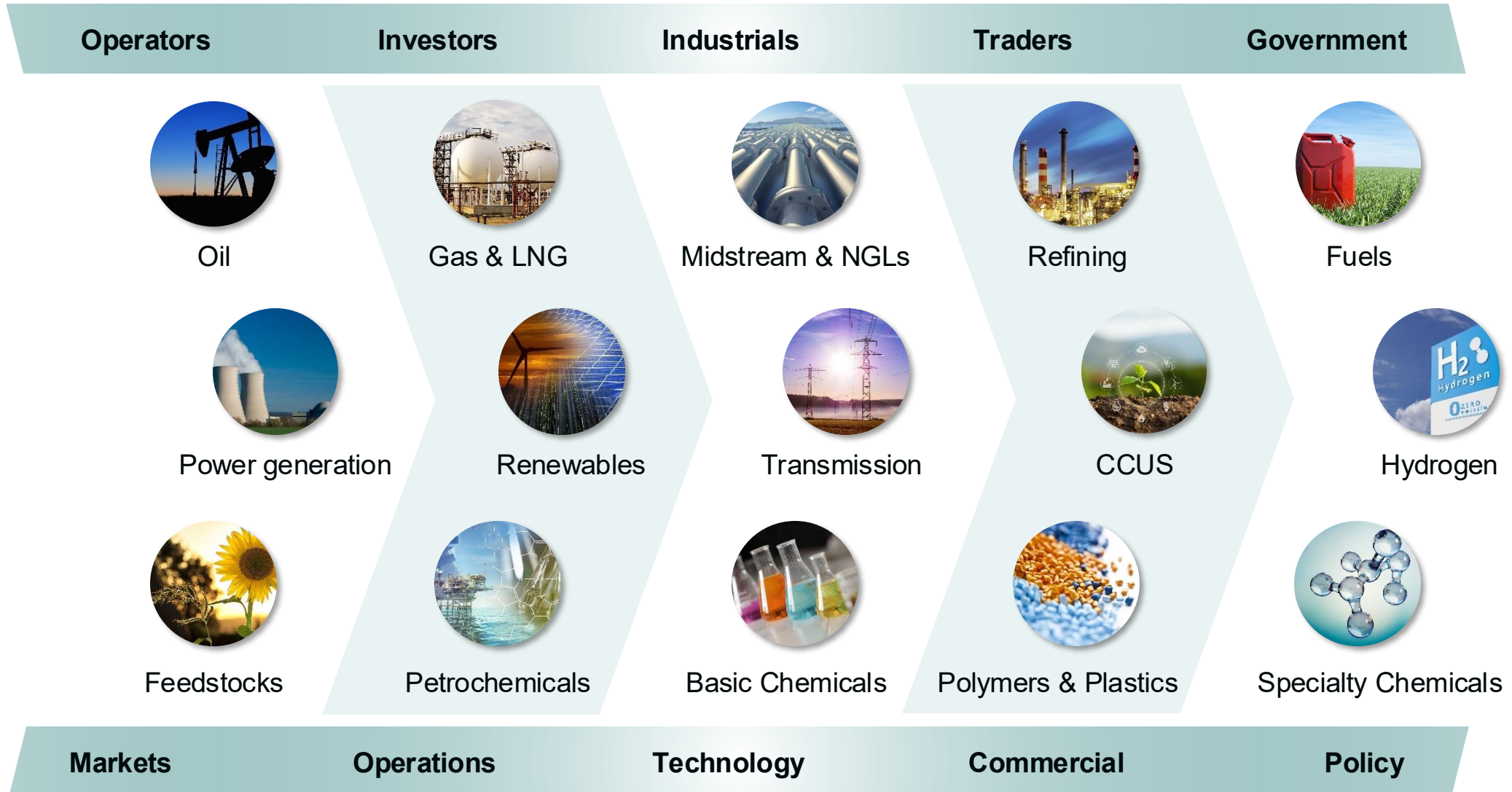
The study launches on May 15 and will be available July 1!

Contact Uday Turaga at +1.281.506.8234 or email info@adi-analytics.com to purchase this study.






































▶ Study prospectus

▶ About ADI Analytics

ADI Analytics is a consulting firm serving oil & gas, energy transition, chemical, and industrial clients



Over 400 clients including Fortune 500 brands, mid-sized firms, start-ups, and investors have engaged ADI to shape decisions

Oil & Gas							Investors	Early-stage	Public
									
Chemicals									
									
Industrials & Digital									
									
Oilfield Services									
									
EPC									
									

Our value proposition – expertise, proven experience, thought leadership, and analytics – is designed to help clients succeed

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Nearly **1,000 projects** for
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Track markets with ADI's subscription research



Analytics

Inform workflows with ADI data, models, and analytics

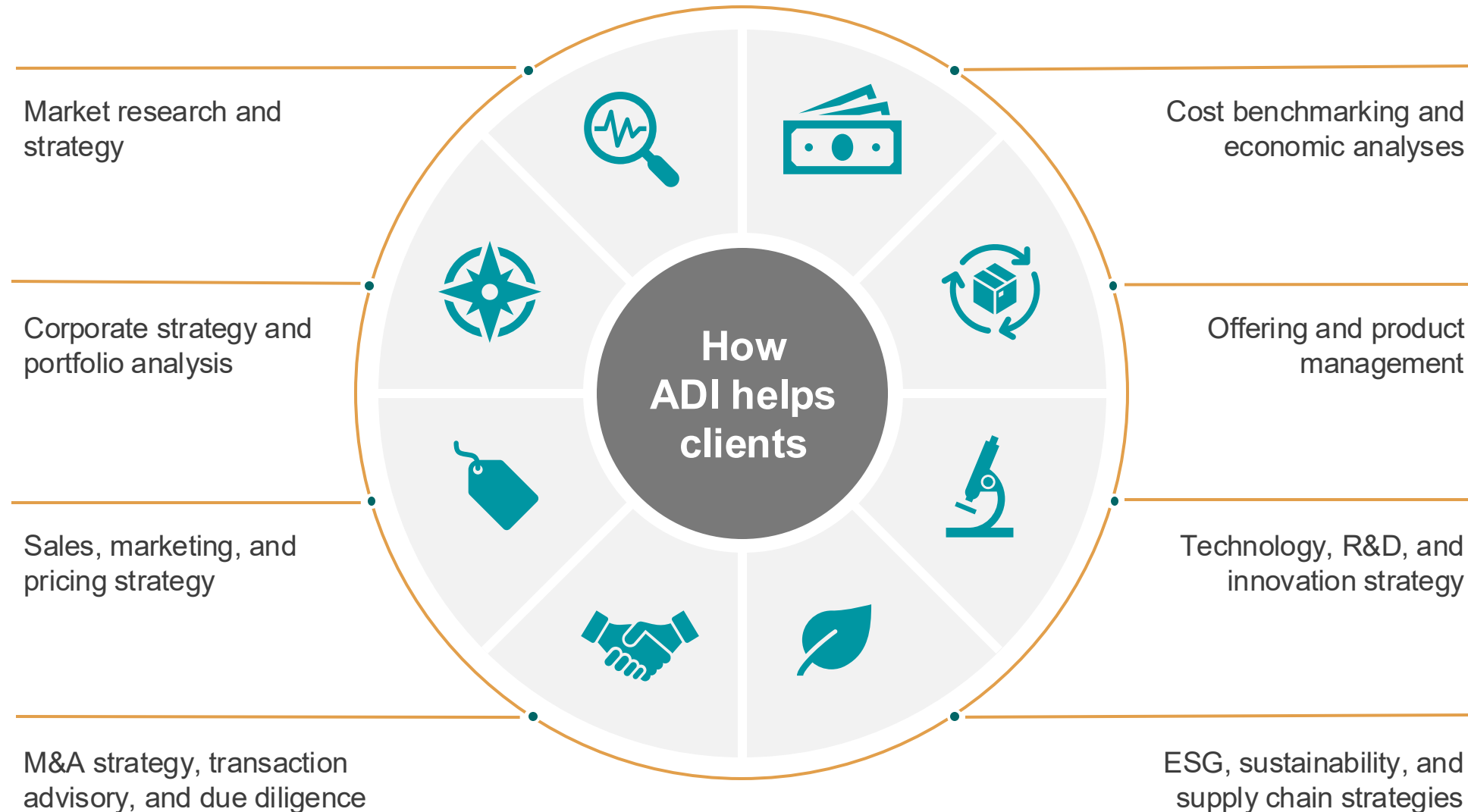


ADI Forum

Build a strategic view and network at our conference



Clients shape strategy, grow sales, refine costs, drive deals, and build competencies with ADI's management consulting services



ADI's structured and rigorous approach is built on our deep expertise and rich industry knowhow in energy and chemicals



Upstream

- Oil basins / shale plays
- Exploration trends
- Completion strategies
- Production services
- Oilfield services
- Offshore operations
- Digital and automation
- Oilfield waste mgmt.
- Wastewater treatment
- Oilfield equipment
- Oilfield chemicals
- Enhanced oil recovery
- Upstream technology
- Asset valuations
- Country assessments



Midstream

- On/offshore pipelines
- Gathering & process.
- Gas processing plants
- NGL fractionators
- Oil, LPG, NGL exports
- Ethylene exports
- Ethane rejection
- LNG project feasibility
- Condensate splitters
- Midstream equipment
- Compressor services
- Drag reducing agents
- Corrosion inhibitors
- Sulfur removal units
- Methane emissions



Downstream

- Refining markets
- Refinery operations
- Fuel demand / supply
- Fuel trading and retail
- IMO 2020 regulations
- Fuel product export
- Auto regulations
- Crude-to-chemicals
- Process automation
- Refining catalysts
- Process licensors/EPC
- H2S scrubbers
- Wastewater treatment
- Small-scale GTL / LNG
- Fuel / lube additives



Chemicals

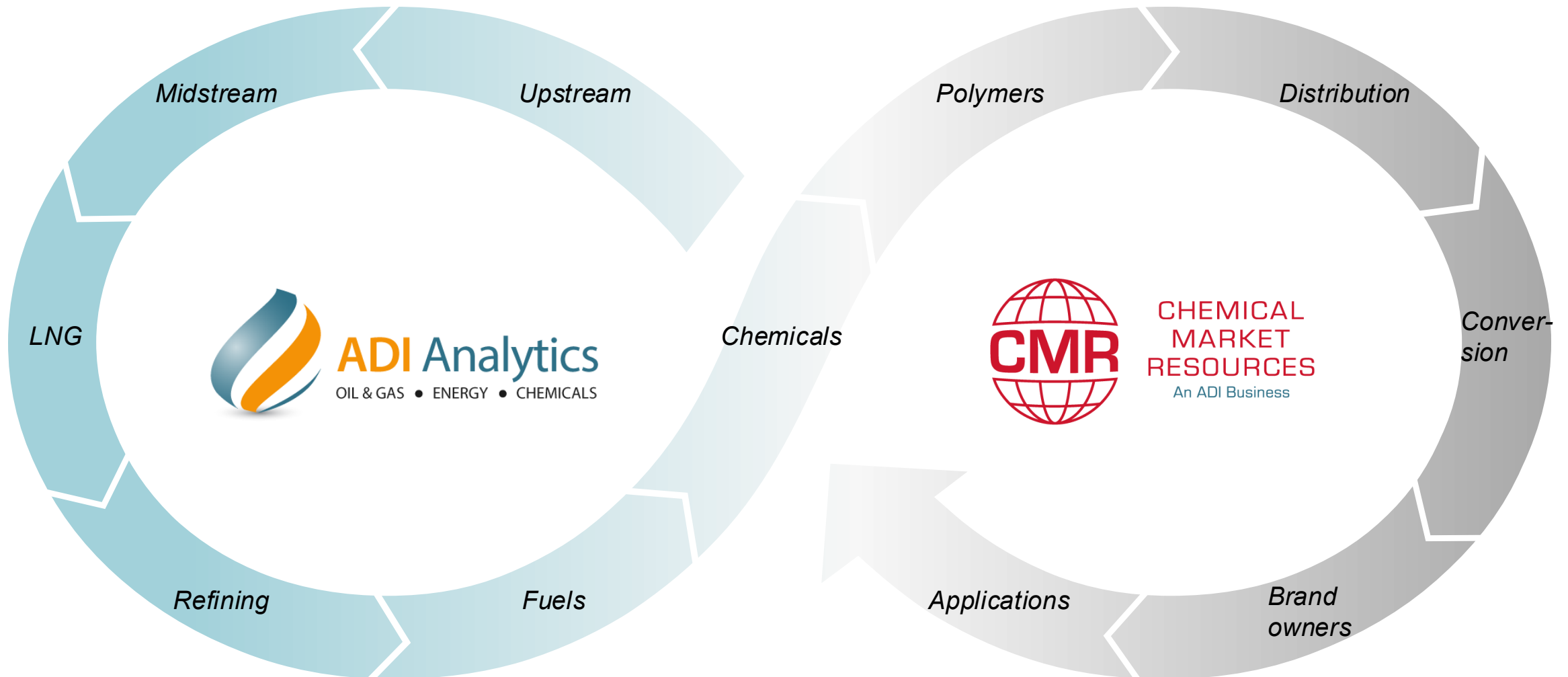
- Olefins and aromatics
- Polyolefins / plastics
- Flexible packaging
- Styrene-block copoly
- Ethylene value chain
- Propylene value chain
- C4 value chain
- Pygas and derivatives
- Bio-based chemicals
- Oxo-chemicals
- On-purpose olefins
- Methanol / ammonia
- Specialty tolling
- Electronic chemicals
- Specialty amines



Energy transition

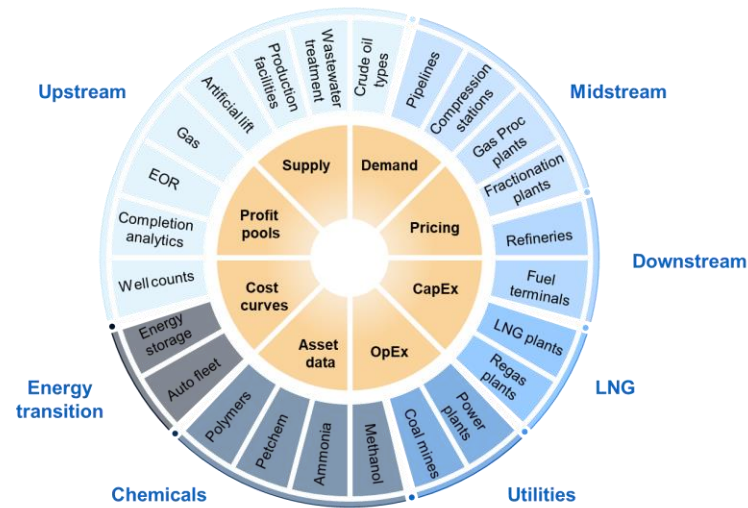
- Coal-/gas-fired power
- Solar and wind
- Steam turbines
- Micro gas turbines
- Small modular nuclear
- Geothermal and EGS
- Distributed generation
- Power systems
- Transmission
- Li-ion batteries
- Energy storage
- Boiler feed pump
- Demand response
- Smart meters
- Microgrids

With the acquisition of Chemical Market Resources, ADI's expertise now covers the entire hydrocarbon value chain

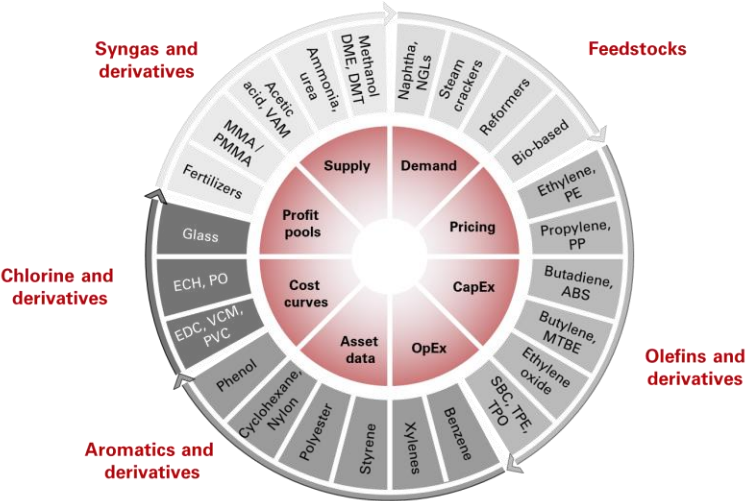


Finally, ADI databases and subscription research services will shape our work with the latest intel, forecasts, and insights

Oil & Gas



Chemicals & Polymers



ADI's subscription research services



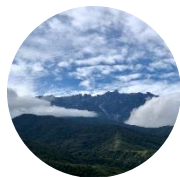
SAF tracker [↗](#)



Direct air capture [↗](#)



Jet and aviation fuel [↗](#)



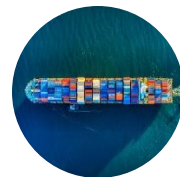
Green cement [↗](#)



Climate solutions [↗](#)



Small-scale LNG [↗](#)



Marine Fuels [↗](#)

ADI consistently exceeds client expectations in project delivery, client service, and satisfaction



"Work directly with firm partners ... high-quality work products."

- Alex Rozenfeld, VP, Ventures, Shell



"Lots of oil & gas expertise. Very analytically driven. Better customer service."

- Vikki Dunn, CMO, GE Oil & Gas



"The best about ADI is their ability to drill into a specialized area."

- Johanna Schmidtke, Director, Saudi Aramco



"Very diligent, very detailed ... went the extra mile."

- Elliott Smith, VP, Strategy, Voith



"They've been outstanding. ADI is very thorough, very professional. They deliver a lot of good insights right out of the gate."

- Randy Benson, VP, Sales, Harsco



"The thoroughness of ADI's research is phenomenal."

- Steve Woodward, SVP, Antero Resources



"ADI did a great job to help us think and advance in making our investments."

- Meghan Leggett, Principal, White Deer



"ADI has very deep market knowledge and access to the right experts and delivered very successful projects."

- Brian Orkin, Partner, Arsenal Capital Partners

Build a strategic view of oil & gas, energy transition, and chemicals with executive perspectives at the ADI Forum



Oil & Gas

Upstream, midstream, natural gas, LNG, refining, and fuels



Energy Transition

Renewable power, CCUS, biofuels, hydrogen, batteries, and sustainability



Chemicals

C1 derivatives, plastics, specialty chemicals, engineered materials, and recycling

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