



THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



The Trinidad & Tobago Energy Conference

Sustainability through People & Technology

Mark Loquan, President NGC

5th February 2019



MEMBERS OF THE NGC GROUP OF COMPANIES



**THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED**

DISCLAIMER

The National Gas Company of Trinidad and Tobago Limited (NGC) has agreed to make this presentation to the attendees of this event. NGC makes no representation as to the accuracy of the information contained herein and advises that no reliance should be placed on that information. The information in this presentation is based primarily on publicly available sources, which NGC is not responsible for preparing or verifying.

The information provided shall not be binding on NGC, its shareholders, board of directors, employees and/or agents, and has no legal effect and in no circumstances shall the contents be relied upon for any reason whatsoever. No responsibility is accepted by or on behalf of NGC, its shareholders, board of directors, employees and/or agents for any decisions made by the recipients of such information pursuant to receipt of the information nor shall NGC be responsible for any direct or indirect consequences as a result of any reliance on the information being provided by NGC herein.



PHOENIX PARK
GAS PROCESSORS LIMITED



Trinidad and Tobago NGL Limited



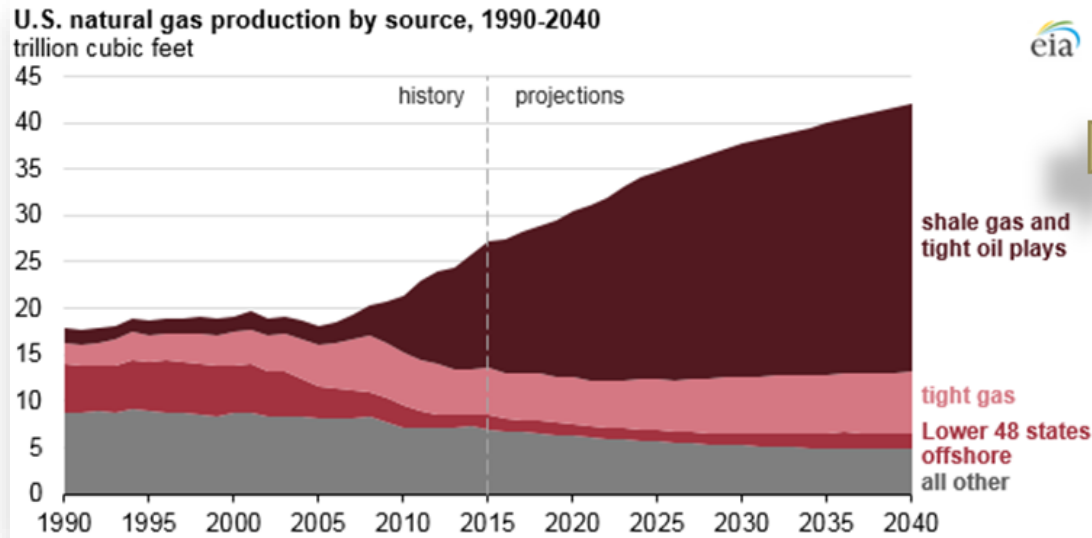
NGC CNG
Company Limited



MEMBERS OF THE NGC GROUP OF COMPANIES



THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



Currently the US accounts for a 45% growth in global natural gas production; Shale Gas accounts for 2/3rds of the total output.

Increasing Ammonia capacity in the US

Emerging Asian markets, led by China, account for more than half of the growth in global natural gas consumption to 2023.

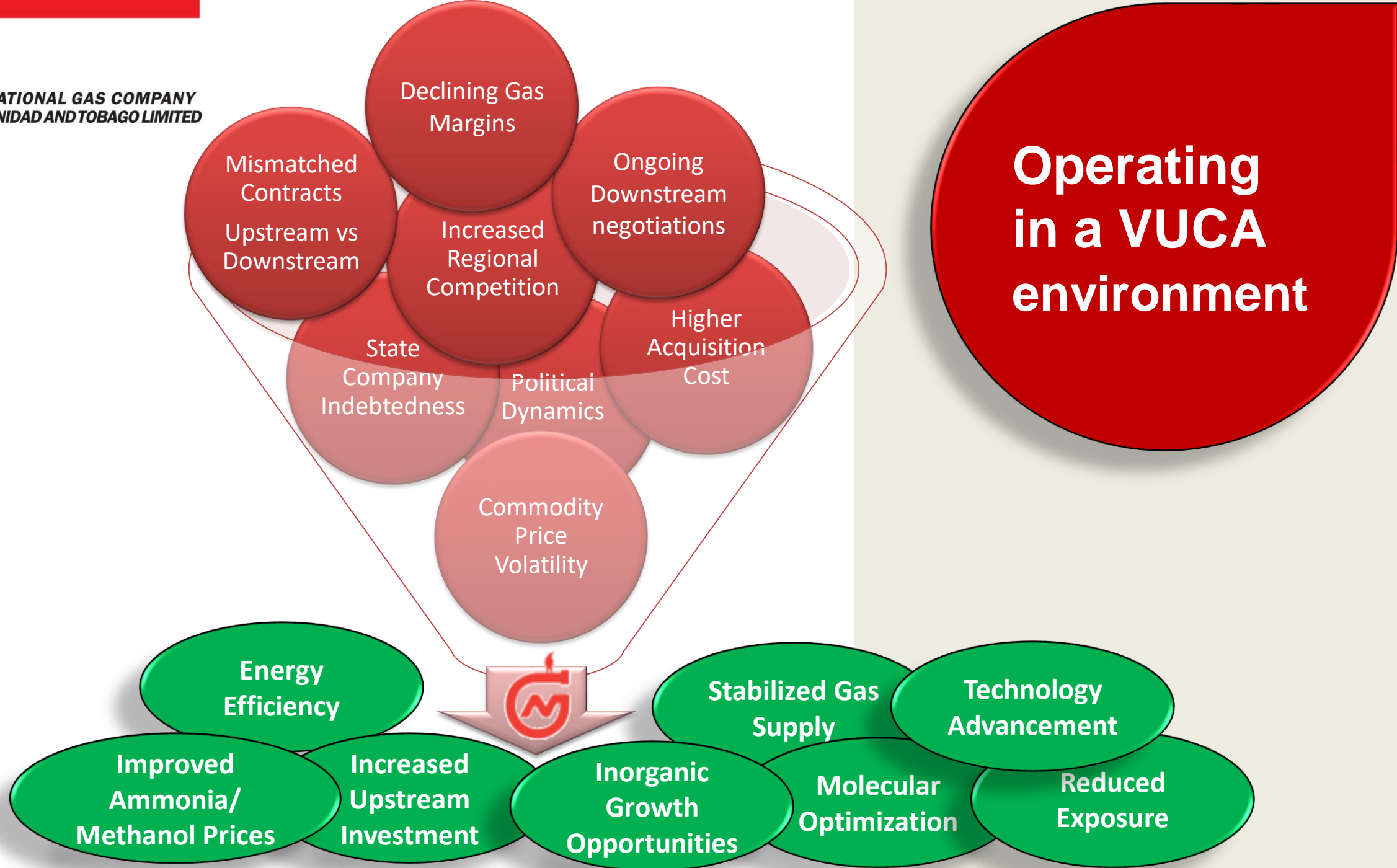
Global Trends Impacting Trinidad

8.3% Increase in Ammonia Production

China switching from Coal to Gas



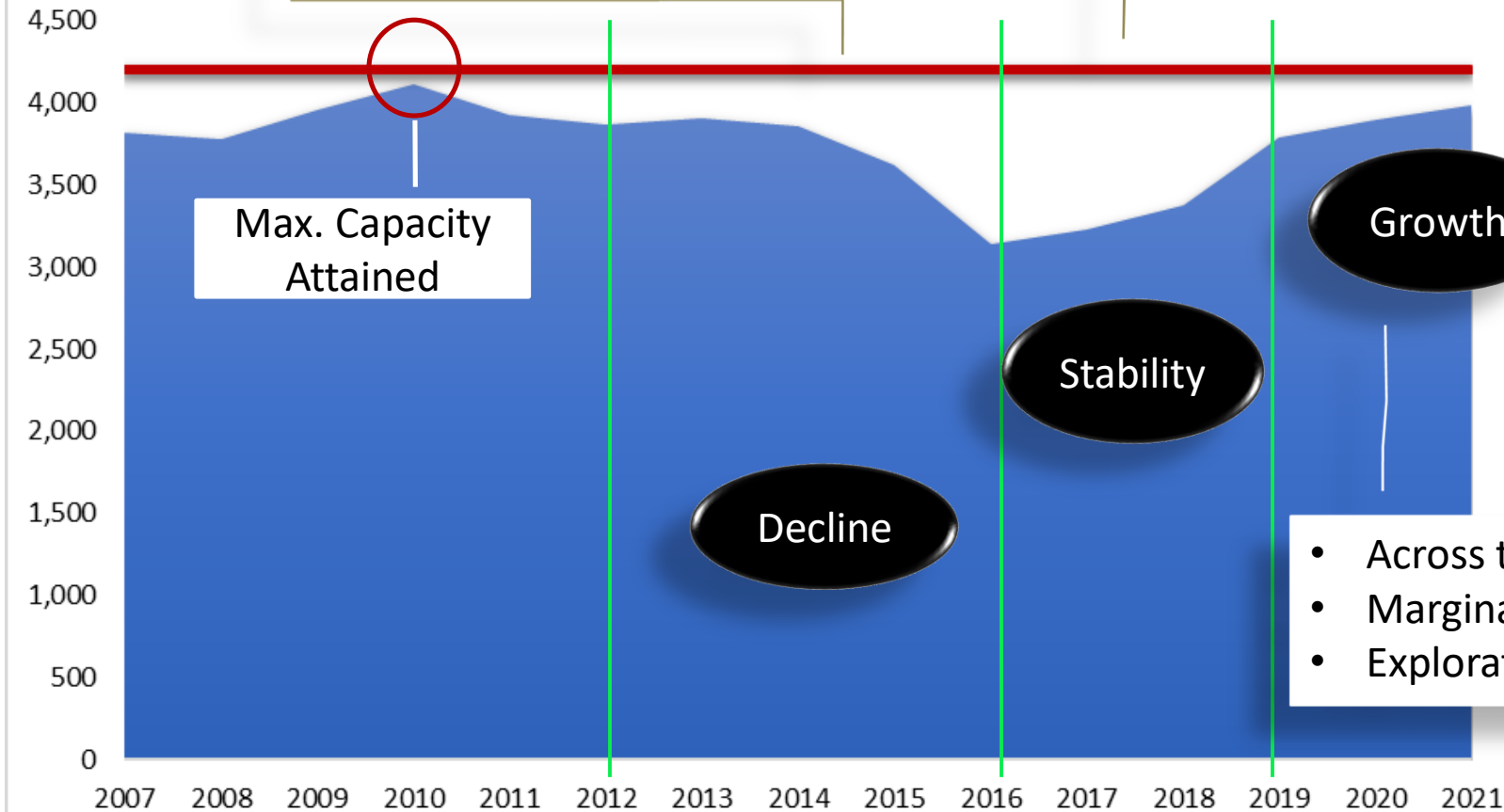
THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



- Lack of Timely Investment
- Depletion of Reservoirs

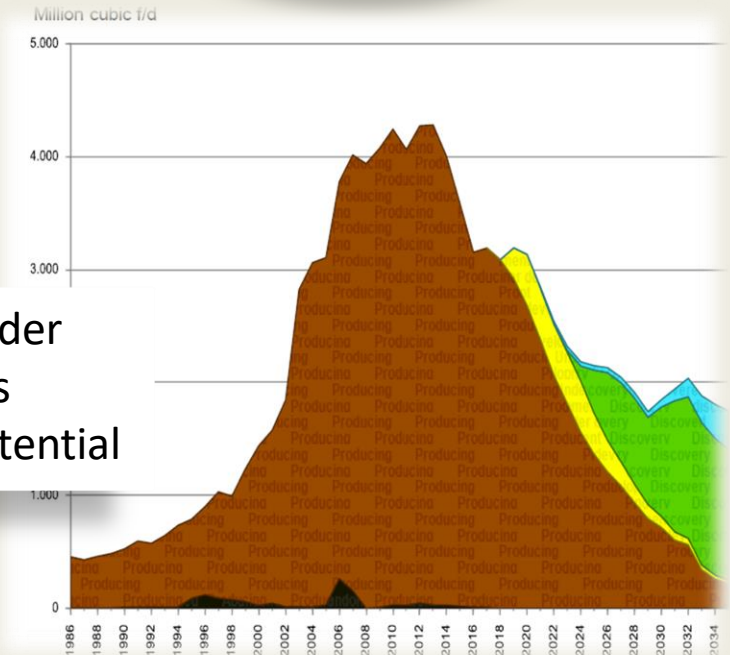
- TROC
- Juniper
- Sercan
- Molecular Optimization

Gas Supply

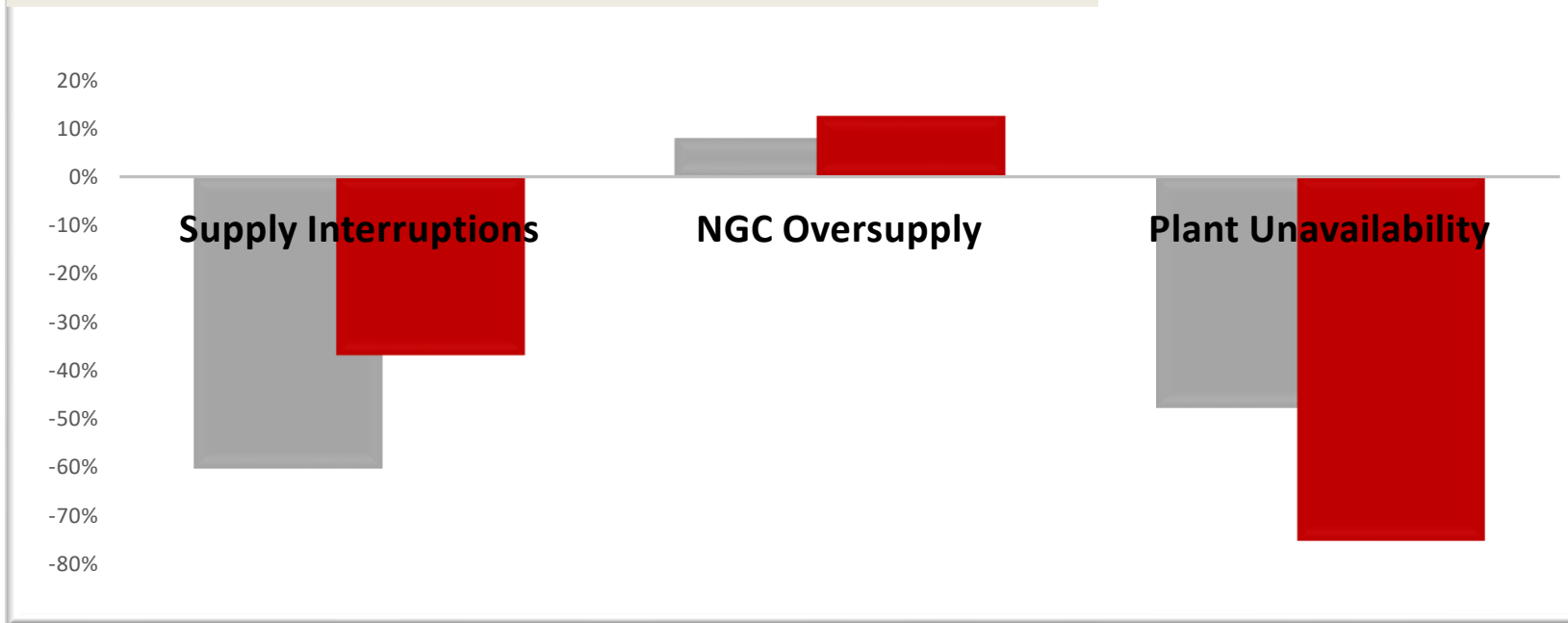


- Across the Border
- Marginal Fields
- Exploration Potential

Gas Supply Situation



The Present Domestic Supply-Demand Situation

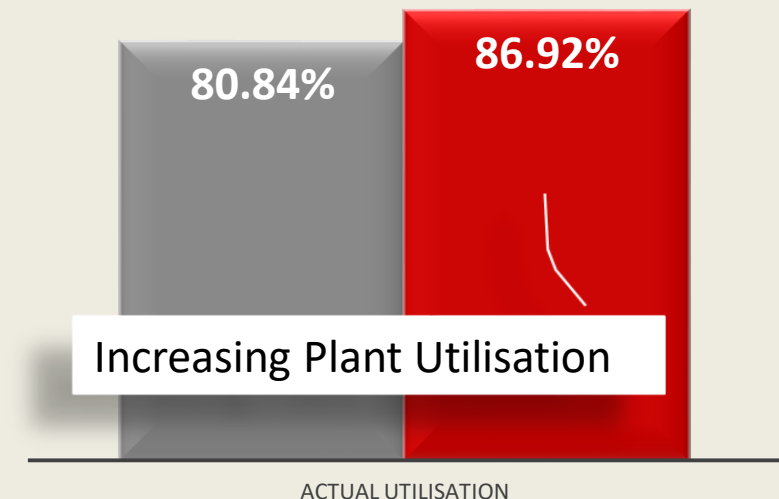


Improvement in supply stability across the network, positively impacting downstream plants. This improvement resulted in a trend of increasing Plant utilisation.

Managing our Molecules

Plant Efficiency Analysis

■ 2016 ■ 2018



Energy Efficiency – getting the same or better output using less molecules

Benefits

Increased
Revenue via
taxes

The Opportunity Cost
in 2017 above
US\$300M, with approx.
US\$3B between 2012 -
2017

Additional
Gas supply to
Downstream

Additional gas improves
plant efficiency

Mitigating Actions

Renewable Energy Initiatives

- Solar
- Wind

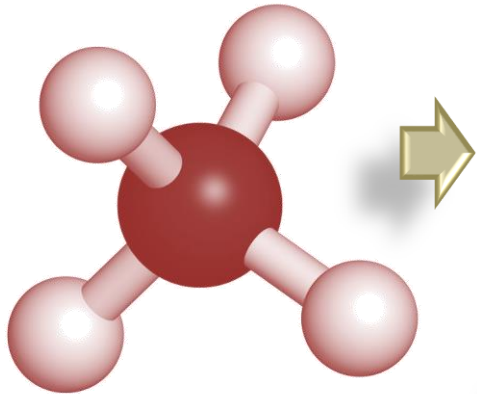
Energy Efficiency Initiatives

- Molecular Optimization
- LIC
- ESCO

Education

- Rethinking Energy Videos

Renewable Energy & Energy Efficiency





THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED

- Debottlenecking Technology
- Asset Integrity

- Molecular Optimisation
- Power Tranche
- Across the Border
- Marginal Fields
- Alignment along the value chain
- Improve communication along the value chain

- Upstream Contracts
- Downstream Contracts

NGC today

- Train 1/Strategic discussions incl. GORTT on other Train Renewals
- LNG/Third Party Cargo Trading
- Energy Marketing & Trading

Pipeline Company

Aggregator

Merchant

Integrated Gas Player



THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



Business
Development
Competency

Market
Intelligence

International Opportunities :

- Mozambique
- Ghana
- Inorganic Growth
- Cargoes & Asia LNG

Regional Opportunities:

- Micro LNG
- Dragon & VZ opportunities
- Grenada
- Guyana

Locally:

- Strategic review of upstream and downstream investments
 - CGCL Downstream

**Growing
beyond T&T
shores**



THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED

Sustainability

Secure Current Business

- . Gas Contract Management
- . Across the Border Supply
- . Marginal Fields



Safety

Develop Organization

- . Org. Structure
- . Technology
- . Governance
- . Cost Management
- . Project Management



People

Grow Locally & Internationally

- . LIC
- . LNG
- . Mozambique
- . Marketing & Trading



Projects

Strengthen National Contribution

- . Carbon Sequestration
- . Reforestation
- . Heroes Foundation
- . Steelpan



Governance

Values
Culture
Technology

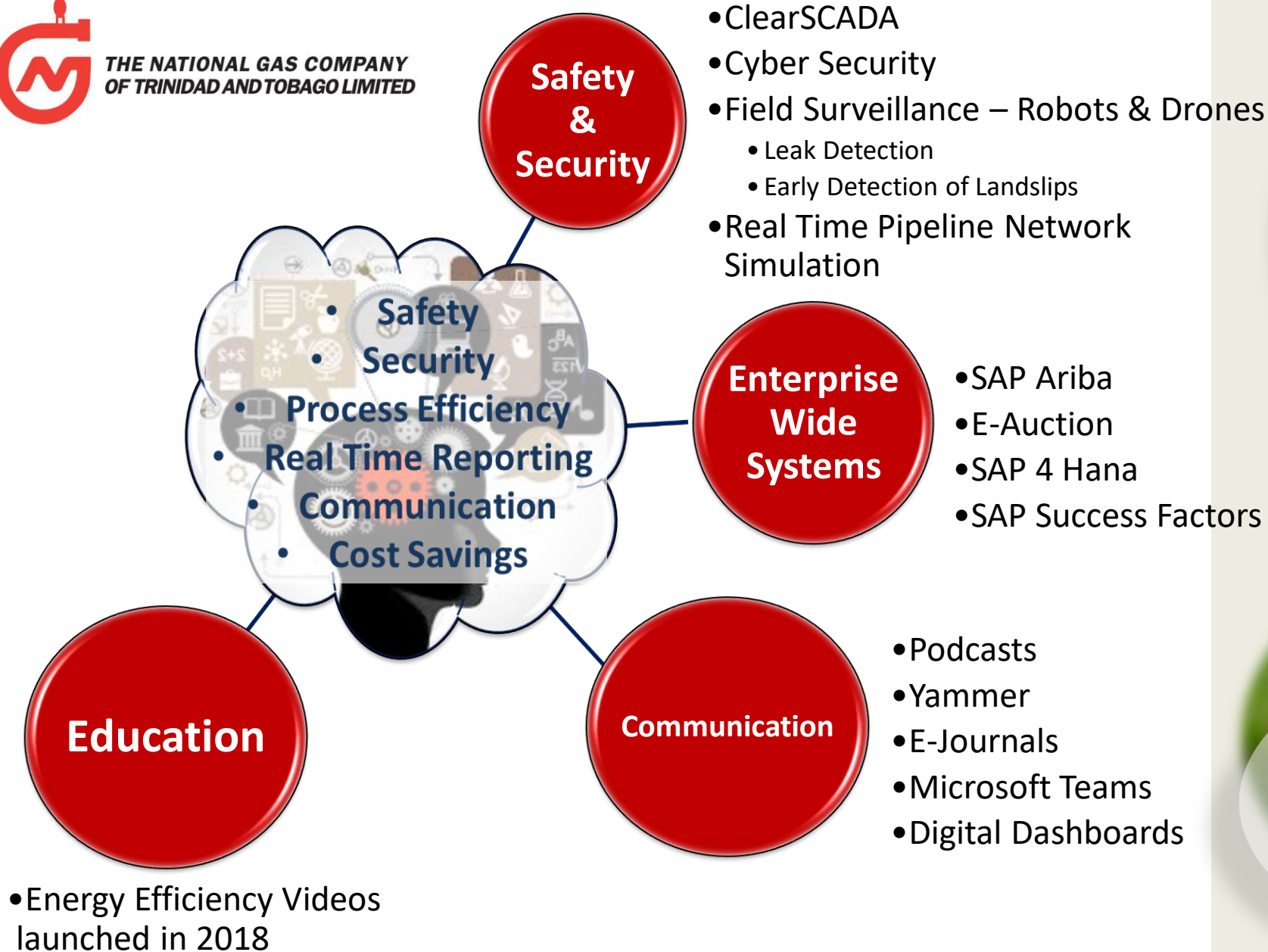
Strengthening the Organisation to ensure Sustainability

**Core Values: Safety & Environmental Preservation
Integrity; Employee Engagement; Excellence; Transparency; Customer Focus; Corporate Social Responsibility**

**Leadership Driven
Learning Organization
Data Driven
Lessons Learnt/Incident Sharing**



THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



Technology Strategy Shaping NGC





THE NATIONAL GAS COMPANY
OF TRINIDAD AND TOBAGO LIMITED



Music Literacy

- Sheet Reading



Music Scoring

- NGC /UWI undertake to transcribe Panorama compositions for 4 NGC sponsored bands



Sponsorship



Pan Manufacturing & Tuning

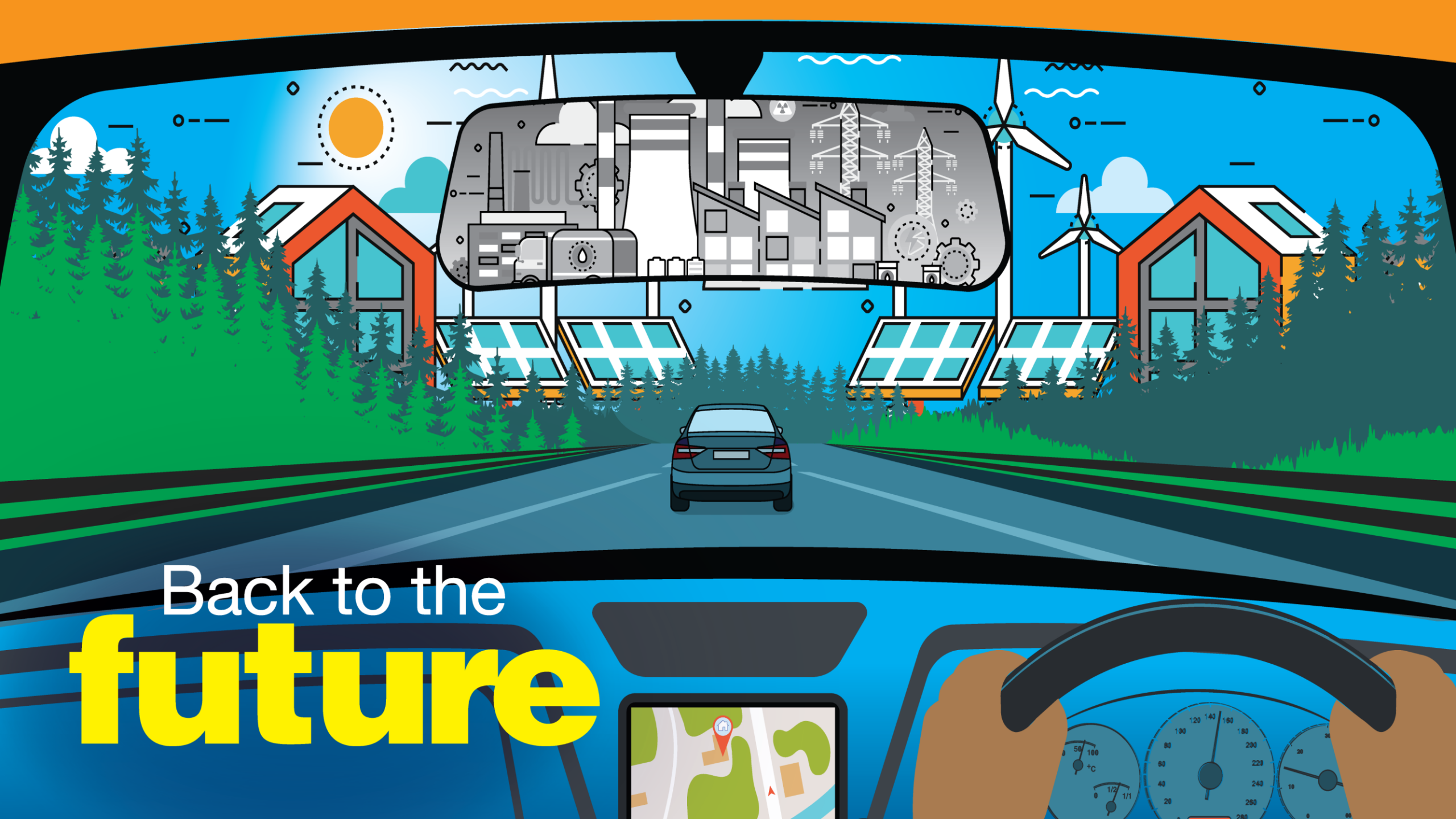
- NGC teamed up with MIC Institute of Technology to provide a Mechanical Engineering Technology with Steelpan Manufacturing Course



Capacity Building (life skills)

- Financial Management, Business Management...

**NGC
continues to
build
sustainability
through
people**



Back to the
future