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Associazione nazionale imprese gas liquefatti

LNG Conference 2017
Italian commitment in LNG development and
emission reduction
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Assogasliquidi commitment for LNG development

Since 2013 Assogasliquidi - together with the LPG sector that has historically been represented by our Association - has started to deal with LNG questions related to its use in various sectors: land and sea transport, industrial uses, off-grid networks.

Today Assogasliquidi has about 40 companies being part of its association, all of them involved in making the necessary investments for the development of the entire LNG chain: from supply infrastructure to end-users distribution.

follows



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Assogasliquidi commitment for LNG development

Relating to the needs highlighted by the companies, that became interested in this business segment, Assogasliquidi has dealt with the needs of the sector and submitted to the competent administrations some requests:

- Simplification and defined deadlines for authorization procedures for **storage infrastructures**
- Guarantee a **consistent and harmonious development of LNG distribution** in the three main uses
- **Stability of level of taxation**



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LNG development: what has been done

The publication of the first fire prevention technical guidelines has proven to be an important factor for the development of the fuel retail network and for the development of plants powering industrial activities

In 2015 there were only 2 operative gas stations, today they are 19 and new plants will shortly be activated.

Today LNG-powered industrial utilities are **16 (one of which is located in Sardinia)** and further developments are expected.

Two off-grid networks are powered by LNG.



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Italian LNG distribution plants

Impianti di distribuzione di GNL per autotrazione (30/04/2017)

<i>Tipo di impianto</i>	<i>Gestore</i>	<i>Regione</i>	<i>Provincia</i>	<i>Comune</i>	<i>anno</i>
Impianto pubblico	Concessionaria ENI	Emilia Romagna	Piacenza	Piacenza	2014
Impianto pubblico	F.lli Ratti	Piemonte	Alessandria	Novi Ligure	2015
Impianto pubblico	VGE Carburanti	Emilia Romagna	Bologna	Castel San Pietro Terme	2016
Impianto pubblico	Concessionaria Esso	Marche	Macerata	Corridonia	2016
Impianto pubblico*	Maganetti	Lombardia	Como	Gera Lario	2016
Impianto pubblico	Concessionaria ENI	Toscana	Pisa	Pontedera	2016
Impianto pubblico	Concessionaria ENI	Piemonte	Cuneo	Villa Falletto	2017
Impianto pubblico	Liquimet	Veneto	Padova	Padova (Interporto)	2017
Impianto pubblico	Vulcangas	Emilia Romagna	Rimini-Cesena	Rimini	2017
Impianto pubblico	IPER Carburanti	Emilia Romagna	Parma	Noceto	2017

* *Impianto solo GNL aperto per mezzi convenzionati*

Fonte: elaborazione REF-E



Italian LNG distribution plants

Serbatoi di GNL a servizio di impianti di distribuzione di CNG per autotrazione, L-CNG
(30/04/2017)

<i>Tipo di impianto</i>	<i>Gestore</i>	<i>Regione</i>	<i>Provincia</i>	<i>Comune</i>	<i>anno</i>
Impianto pubblico	Concessionaria TotalErg	Piemonte	Torino	Poirino	2011
Impianto pubblico	Concessionaria Esso	Emilia Romagna	Bologna	Calderara Di Reno	2012
Impianto pubblico	Concessionaria ENI	Lazio	Roma	Roma	2012
Impianto pubblico	F.lli Ratti	Piemonte	Alessandria	Tortona	2012
Impianto pubblico	Kostner GmbH	Trentino Alto Adige	Bolzano	Varna	2012
Impianto pubblico	Pucci Green Power	Lombardia	Lecco	Casatenovo	2016
Impianto pubblico	Concessionaria Esso	Lombardia	Pavia	Mortara	2015
Impianto pubblico	Concessionaria Esso	Marche	Macerata	Corridonia	2016
Impianto aziendale	SETA (Azienda trasporto pubblico)	Emilia Romagna	Modena	Modena	2015

Fonte: elaborazione REF-E

LNG off-grid users

(30/04/2017)

Impresa	Regione	Provincia	Comune	anno
Ferrero Mangimi S.p.A.	Piemonte	Cuneo	Farigliano	2015
Norda S.p.A. (Acque minerali)	Emilia Romagna	Parma	Bedonia	2014
Speziali s.r.l (Macchine agricole)	Emilia Romagna	Mantova	Roncoferraro	2015
Forno Bonomi S.p.A.	Veneto	Verona	Roverè Veronese	2014
Craver s.r.l. (recupero scarti lapidei)	Veneto	Verona	S. Martino di buonalbergo	2014
Levissima (Acque minerali)	Lombardia	Sondrio	Cepina Valdisotto	2014
VIS s.r.l. (Prodotti agroalimentari)	Lombardia	Sondrio	Lovero	2015
Mario Costa S.p.A. (Caseificio)	Piemonte	Novara	Casalino	2014
Fiat Chrysler Auto - FCA	Piemonte	Vercelli	Balocco	2015
Acqua Panna (Acque minerali)	Toscana	Firenze	Scarperia	2016
Rivoira	Piemonte	Cuneo	Verzuolo	2016
Coop. ARBOREA (Centrale del latte)	Sardegna	Oristano	Arborea	2014
Trade Broker (Pressofusione alluminio)	Lombardia	Cremona	Casalbuttano	2014
Lavarent S.r.l. (Lavanderia industriale)	Trentino Alto Adige	Bolzano	Sarentino	2014
FFS (Materie plastiche)	Trentino Alto Adige	Trento	Ossana	2013
Olimpia Due (ceramiche)	Emilia Romagna	Rimini	Verucchio (Villa Verucchio)	2015

Fonte: elaborazione REF-E



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Isolated natural gas distribution networks powered by LNG deposits

(30/04/2017)

Impresa	Regione	Provincia	Comune	anno
IEM <i>(Rete privata di distribuzione locale)</i>	Trentino Alto Adige	Trento	Mezzana (Loc. Marilleva 1400)	2014
Dolomiti GNL <i>(Rete pubblica di distribuzione locale)</i>	Trentino Alto Adige	Trento	Molveno	2017

Fonte: elaborazione REF-E



LNG demand for final consumption

	t (GNL)	mc (GNL)	Smc	ktep
Consumi trasporto stradale pesante	2.040	4.549	2.797.758	2
Consumi trasporto marittimo	-	-	-	-
Consumi utenze off-grid	8.935	19.925	12.253.906	11
Consumi trasporto leggero L-CNG	5.400	12.042	7.405.830	6
Consumi reti di distribuzione <i>off grid</i>	-	-	-	-
Totale	16.375	36.516	22.457.494	19

Fonte: elaborazione REF-E

Anno 2015

Further developments related to DAFI Directive transposition

DAFI

- By the Legislative Decree No. 257 of 2016, the DAFI Directive was transposed in Italy
- The decree approaches many of the "hot" issues for the LNG sector and creates the prerequisites for the development of its distribution
- Particular attention is paid to authorization procedures, for LNG storage and distribution infrastructures, and to measures to be assumed for LNG diffusion



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DAFI decree: core aspects and strenghts

- Regarding authorizations iter, the Decree scheme deals with all the planting solutions necessary for the growth of the distribution infrastructure by delineating the procedures required for construction of storage plants, through simplified procedures and defined deadlines for their attuation.
- Relating to what Assogasliquidi has presented in the technical working groups set up by Ministry of Economic Development, the Legislative Decree 257/16 provides diversified and calibrated authorization rules on the specific realities that are considered: from regasification plants, that intend to offer also LNG transport, storage and distribution service, to «small scale LNG plants», up to small LNG storage facilities intended to feed end-users.



The provisions, therefore, introduce **unique procedures, coordinated between different administrations, but also simplified others for simpler activities.**

DAFI decree: core aspects and strenghts

- Also concerning LNG-powered distribution networks, the decree provides indications and responses in line with the development expectations of this market segment, benefiting local communities and particularly the territories of Sardinia Region.
- For the implementation of the fuel retail network, the Legislative Decree 257/16 introduces the obligation to provide LNG facilities for both new openings (or total renovations) and also for the adjustment of outlets that exceed a certain amount of product sold, as well as the possibility of opening single-product retail outlets.

DAFI decree: core aspects and strenghts

- Regarding the measures for the LNG diffusion in local public transport, the decree provides the obligation for public entities located in areas with high PM10 pollution, at the time of renewal of the car fleet, buses and vehicles for waste collection, to purchase at least 25% of vehicles powered by LNG, CNG and electric.
- Also for the development of LNG in the navigation sector, the strategic framework contained in Legislative Decree 257/16 provides objectives of utmost relevance and challenges for our Country which, if achieved, will contribute significantly to the identification of the best solutions against pollution issues in that market segment.



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Development goals

- **Ground product availability is the real limit to the growth of distribution** across the national territory and especially in the Center / South.
- To face this limit there is a great commitment of the industry that aims to build plants that can ensure the supply of the Italian market.
- Relating to this aspect, the provisions contained in the transposition of the DAFI Directive go in the right direction and will certainly give new impetus to the development of the LNG market in its various uses, ensuring defined deadlines for approval iter and its maximum transparency, also with respect to local communities interested in projects.

follows

Development goals

- **What is now needed is a synergic and proactive action of all public administrations and industries (each for its specific competencies) to ensure the full functioning of the new provisions and to ensure that LNG can develop in all its potential.**
- **Support and promotion tools for LNG demand in its various uses are needed, in the most effective considered form, in order to ensure that our country can rely on an energy source that contributes significantly to the goals of decarbonisation and reduction of atmospheric pollution.**



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THANKS FOR YOUR ATTENTION



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