

# Gastech Energy Club

## LEADERSHIP ROUNDTABLES

Expanding opportunities across the natural gas-to-chemicals value chain and industrial infrastructure



## KEY OUTCOME REPORT

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## Roundtable abstract

The integration of natural gas, LNG, and downstream chemical production is emerging as a pivotal driver of both near-term energy security and long-term industrial competitiveness. Beyond fuel supply, natural gas is increasingly recognised as a strategic feedstock for high-value chemicals and specialty products, enabling industrial clusters, advancing manufacturing capabilities and supporting diversified economic growth. At the same time, infrastructure investment is shifting, driven not only by policy and regulation but also by market forces demanding more adaptive and future-proofed energy systems. This transformation is further accelerated by the exponential growth of AI and the rise of emerging economies, both of which are reshaping global energy systems.

HOST



**Rashid Al Mazrouei**  
SVP – Marketing  
**ADNOC Gas**

MODERATOR



**Aamir Malik**  
SVP – Global Head of Energy &  
Natural Resources Strategy  
**Wood Mackenzie**

MODERATOR



**Melany Vargas**  
VP – Gas & LNG, Head of Global  
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**Wood Mackenzie**

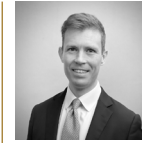
## Participants



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ADNOC Gas



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VP  
Advario



**James Byrne**  
VP - Projects Development  
Australia  
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**Erik Mayer**  
VP - Clean Energy  
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Chairman of the Board  
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Global VP - Oil, Gas  
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Board Member & EVP  
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Sénélec



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Visiting Law Professor  
University of Houston  
Law Centre



**Tom Smeenk**  
EVP Growth  
VTTI

## Roundtable outcomes

*No comments are attributed to any one participant.*

### Key findings

The integration of natural gas, LNG, and downstream chemical production is emerging as a pivotal driver of both near-term energy security and long-term industrial competitiveness. Beyond fuel supply, natural gas is increasingly recognised as a strategic feedstock for high-value chemicals and specialty products, enabling industrial clusters, advancing manufacturing capabilities and supporting diversified economic growth. At the same time, infrastructure investment is shifting, driven not only by policy and regulation but also by market forces demanding more adaptive and future-proofed energy systems. This transformation is further accelerated by the exponential growth of AI and the rise of emerging economies, both of which are reshaping global energy systems.

### Industrial competitiveness and global value chains

Not all LNG-importing regions can sustain competitive industrial production. Success depends on enabling fiscal regimes, advantaged labour, and economies of scale. Without these, many will remain reliant on imports from advantaged producers. Participants highlighted how to achieve competitiveness, import-dependent Asian economies are pursuing virtual pipelines that integrate gas and associated liquids into multi-gas systems, connecting demand across power, petrochemicals, bunker fuel, and broader energy trade.

### Gas as a bridge to decarbonisation and resilience

The value of gas and LNG varies across regions. In Europe, despite regulatory ambition, gas will remain critical for at least another decade, ensuring resiliency and supporting decarbonisation. In Asia, LNG displaces oil products and provides cleaner, more reliable energy for growing populations. The marine sector increasingly relies on LNG for both emissions reduction and supply chain resilience. Across markets, participants emphasised that flexibility and reliability are strategic attributes, though often undervalued by end-users.

### Economics, regulation, and policy alignment

A key enabler for gas and feedstock trade is midstream infrastructure development, but cost inflation is a major barrier with new greenfield projects cited as three to four times more expensive than earlier infrastructure. To reduce development costs, streamlined permitting and regulatory clarity are essential, but current frameworks remain inconsistent. Participants stressed that enduring policy frameworks are particularly critical to underwriting investments in industrial clusters. Yet global alignment is lacking, for example, political leaders in the US and Middle East are pursuing divergent strategies. In the face of uncertainty, international measures like IMO decarbonisation targets may become more influential in setting common standards.

### AI for Energy and Energy for AI

AI emerged as both a disruptive force and a source of opportunity. Participants discussed how AI can optimise maintenance, improve efficiency across the value chain, and support demand forecasting. At the same time, the rapid buildout of data centres creates surging electricity demand that natural gas is uniquely positioned to meet. This duality positions AI as both a consumer of and an enabler for more efficient energy systems.

### The branding challenge

Gas and LNG already offer lower emissions than coal and oil, and emerging technologies now allow for precise carbon-intensity measurement. Gas and LNG infrastructure can also be future-proofed by integrating electric drives, CCS, and AI-enabled optimisation, while allowing for potential hydrogen use in the future. Participants noted the opportunity to leverage these characteristics to strengthen the perception of gas as a credible long-term low-carbon solution. Building this brand will be vital for maintaining customer confidence, particularly in Asia where demand growth will be decisive.

### Conclusion

The roundtable underscored that natural gas and LNG are not only resilient components of the global energy system but also strategic enablers of industrialisation, petrochemical growth and decarbonisation. The accelerating interplay between AI and energy reinforces the need for agility in both planning and investment. Regions that integrate industrial clustering, supportive policies, and innovative value chains will be best placed to transform gas wealth into long-term industrial and economic strength.

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