

El mercado internacional del GLP

8º Congreso Internacional
Agosto 2026

GASNOVA
Asociación Colombiana del GLP

OPIS
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Adrian Calcano
VP Energía y Materias Primas



DOW JONES

THE WALL STREET JOURNAL.

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CHEMICAL MARKET ANALYTICS
BY OPIS, A DOW JONES COMPANY

 dragonfly
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DOW JONES ENERGY

Investigación, datos y descubrimiento de precios para entender un mercado cada vez más interconectado

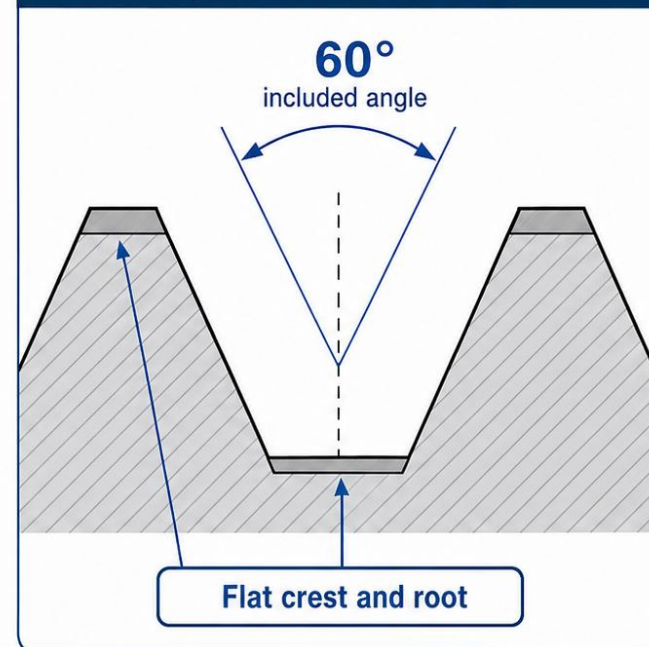
La importancia del estándar global:



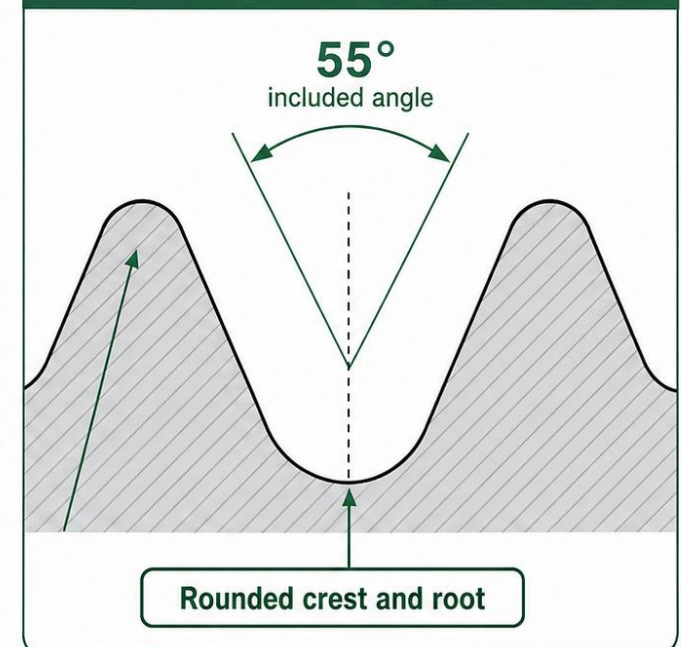
Screw Thread Angle Comparison

United States (pre-war) vs. English (Whitworth)

United States pre-war standard
(Sellers / USS / SAE)



English standard
(Whitworth)



Key difference: U.S. pre-war threads used a **60°** form;
Whitworth threads used a **55°** form.

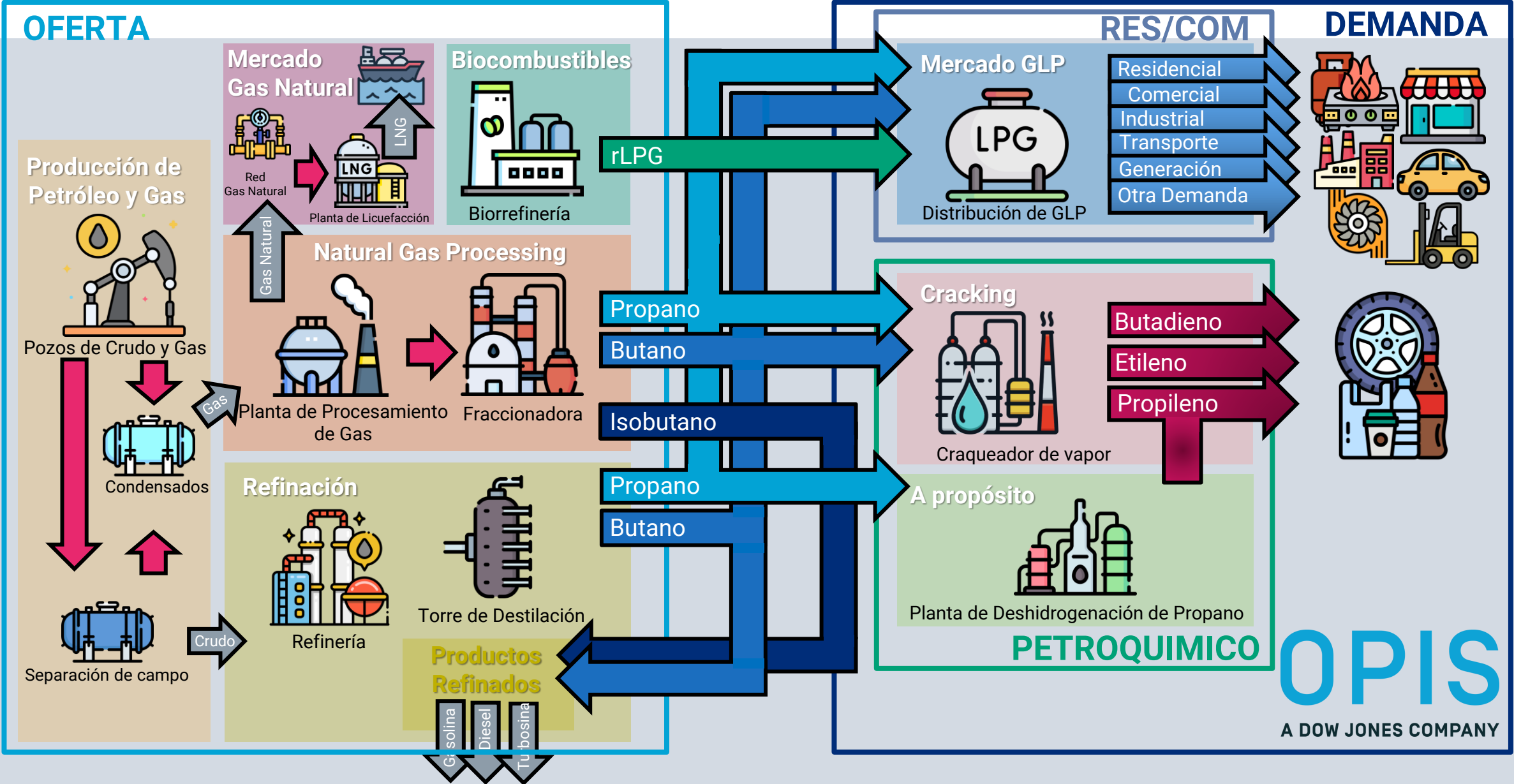


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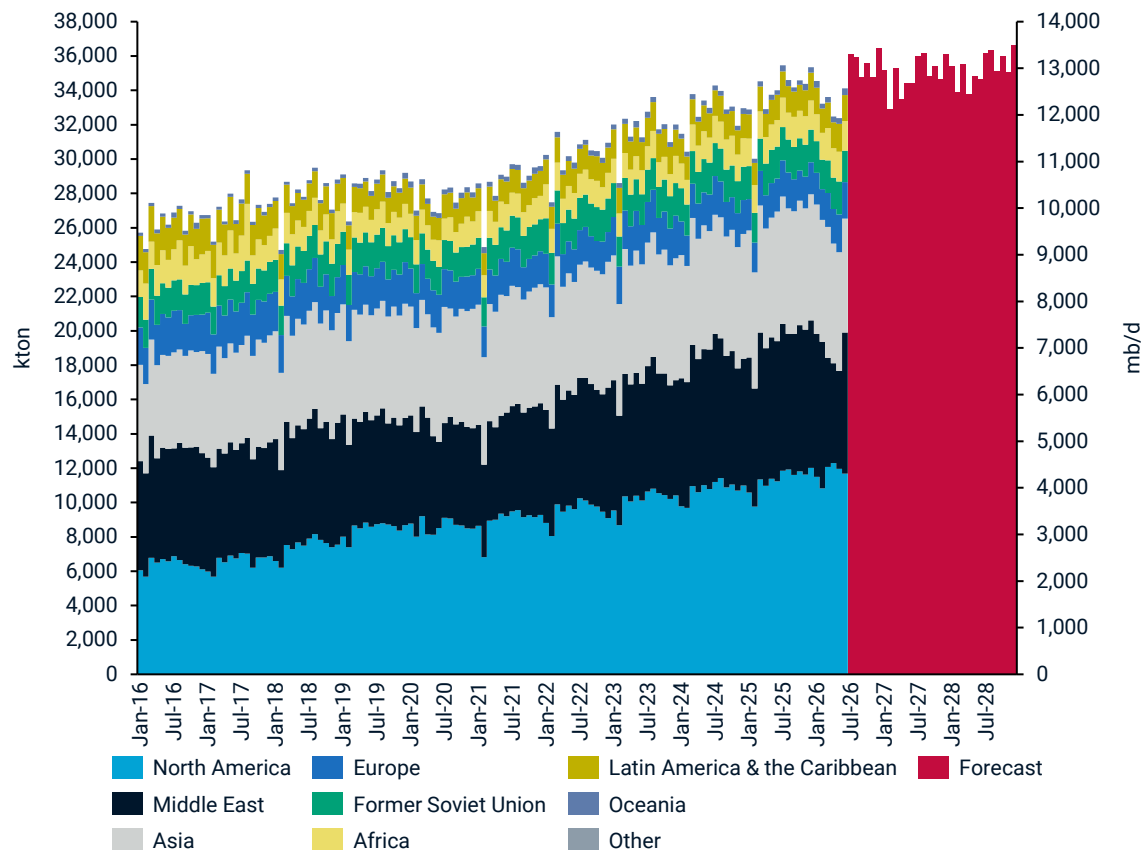
Fundamentos del mercado global del GLP

La cadena de valor del GLP: En el GLP, la oferta crea el mercado: la producción impulsa comercio, infraestructura y demanda



El crecimiento de la producción estadounidense continúa siendo el principal motor de la expansión global del GLP

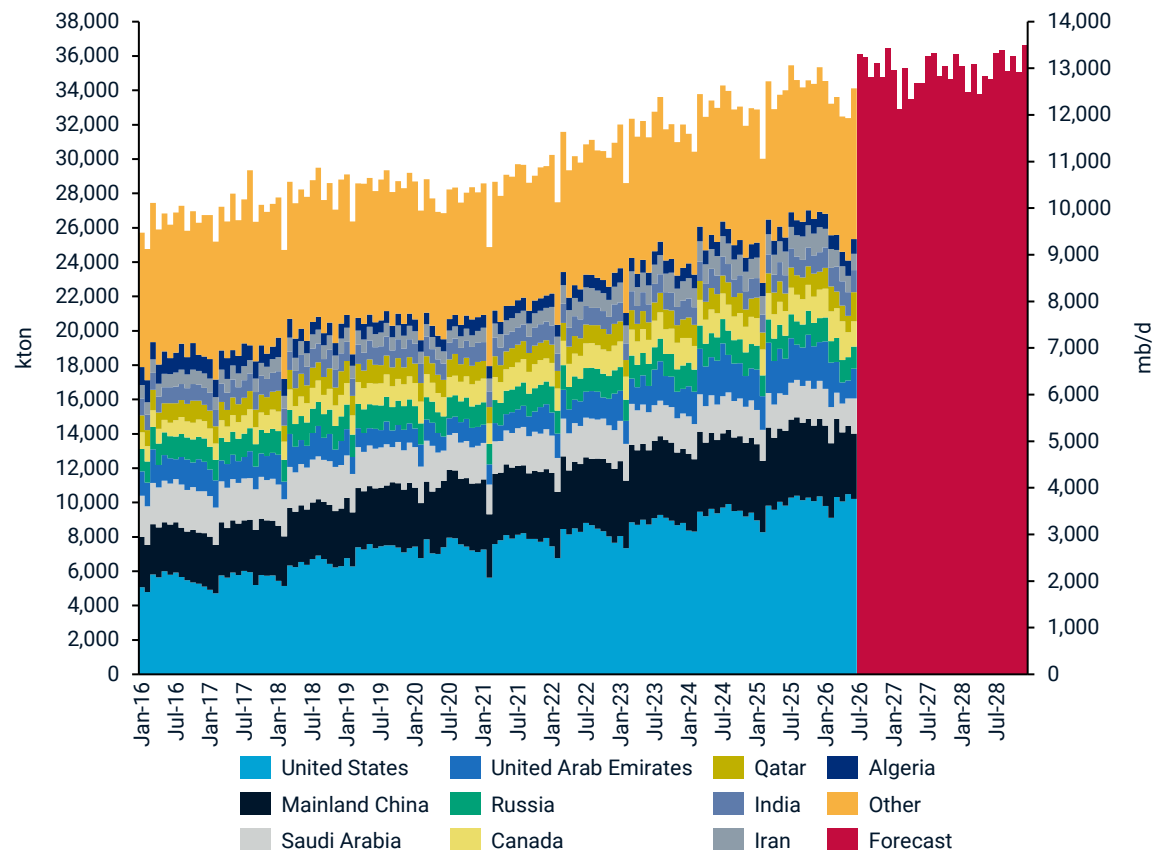
Global LPG balance: production by region



Source: OPIS, A Dow Jones Company

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Global LPG balance: production by country

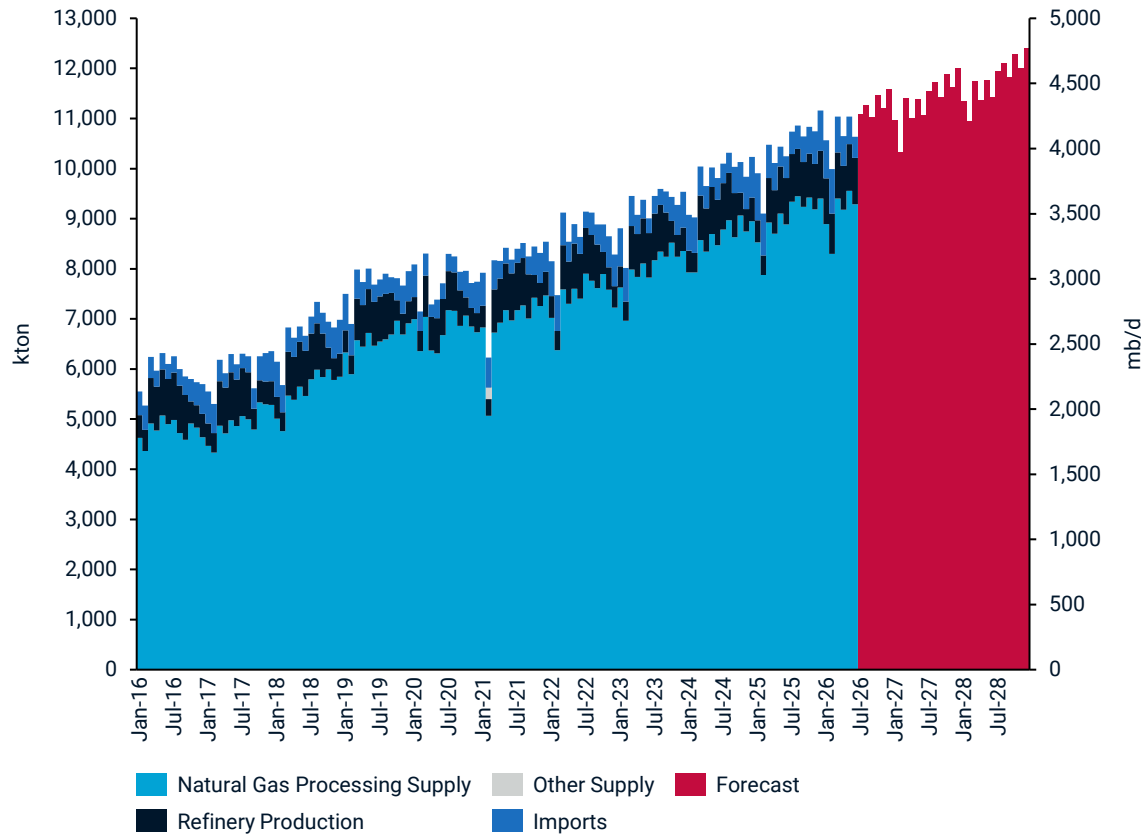


Source: OPIS, A Dow Jones Company

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El crecimiento del gas natural genera cada vez más GLP... y una creciente necesidad de exportarlo

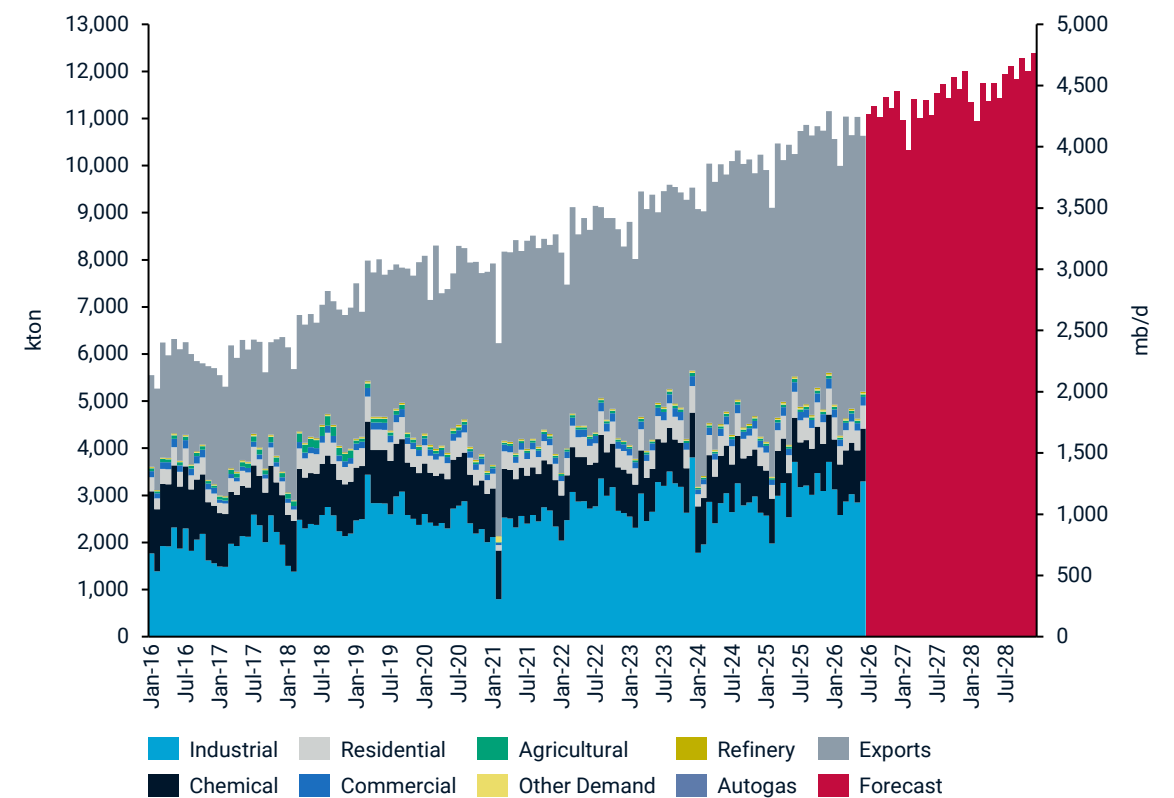
United States LPG: supply by source



Source: OPIS, A Dow Jones Company

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United States LPG: demand by sector

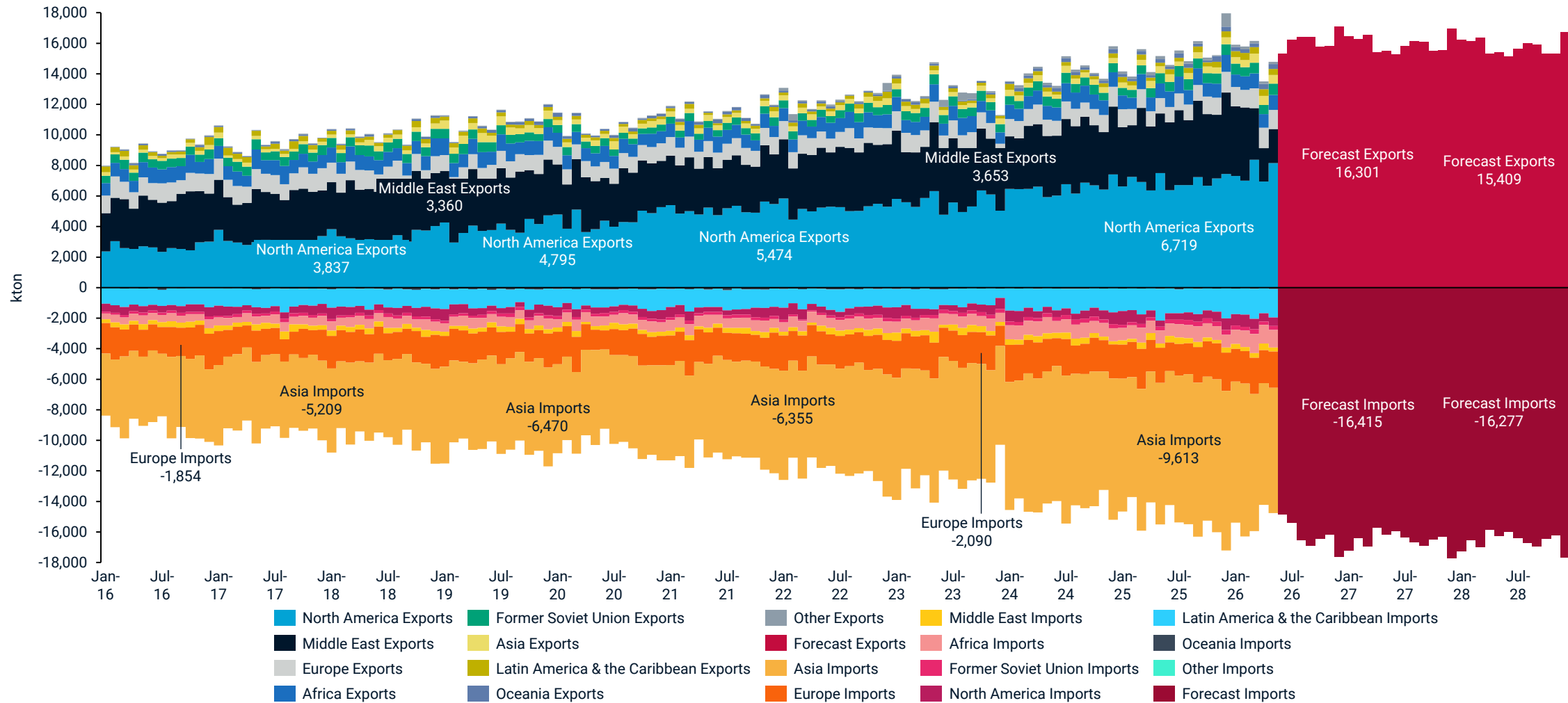


Source: OPIS, A Dow Jones Company

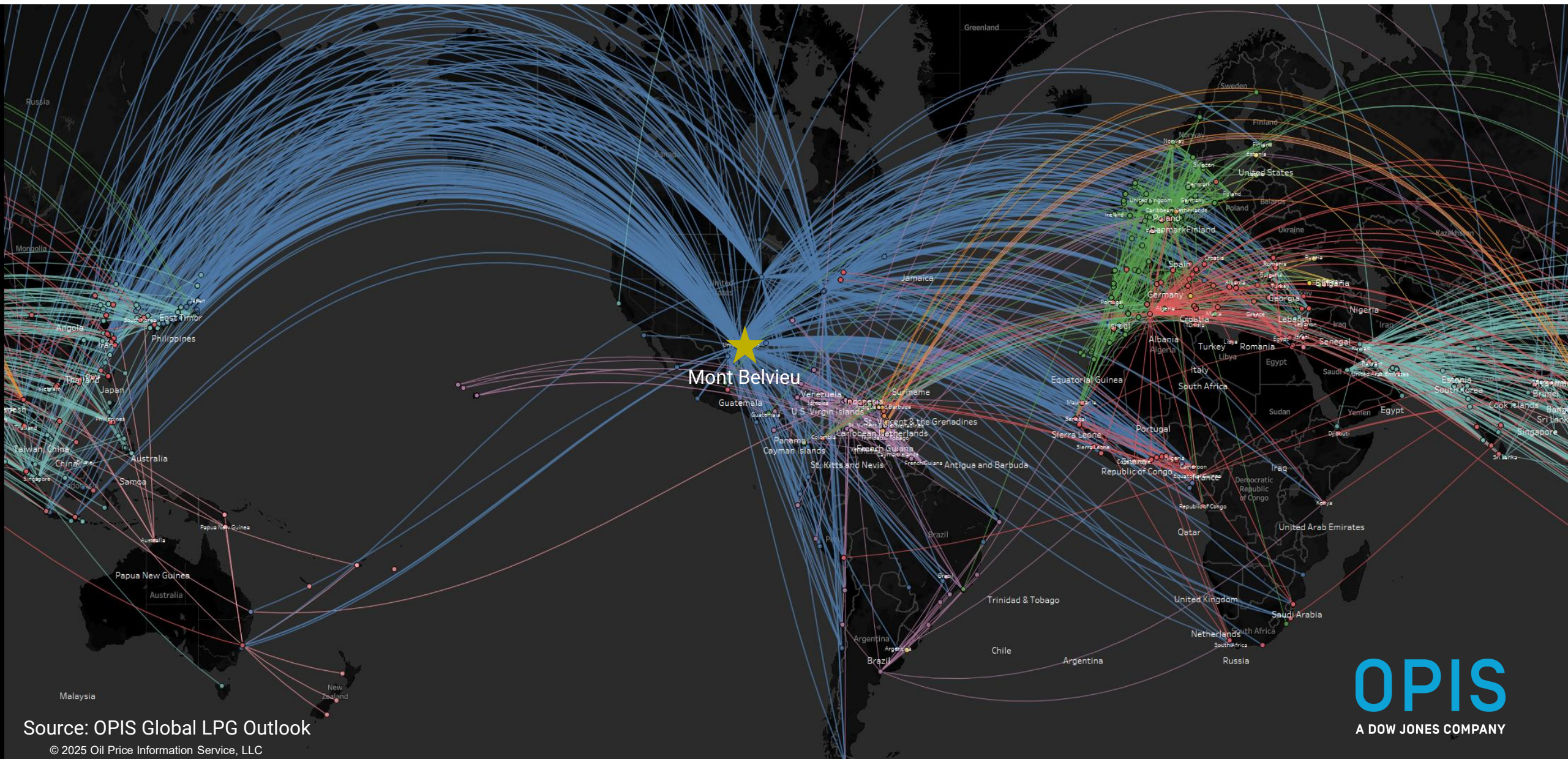
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La balanza comercial global del GLP

Asia continúa siendo el gran destino del crecimiento de la oferta mundial

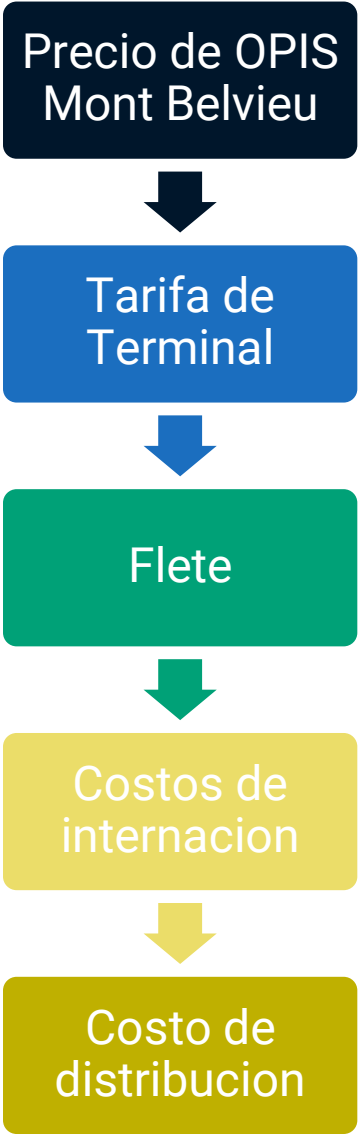
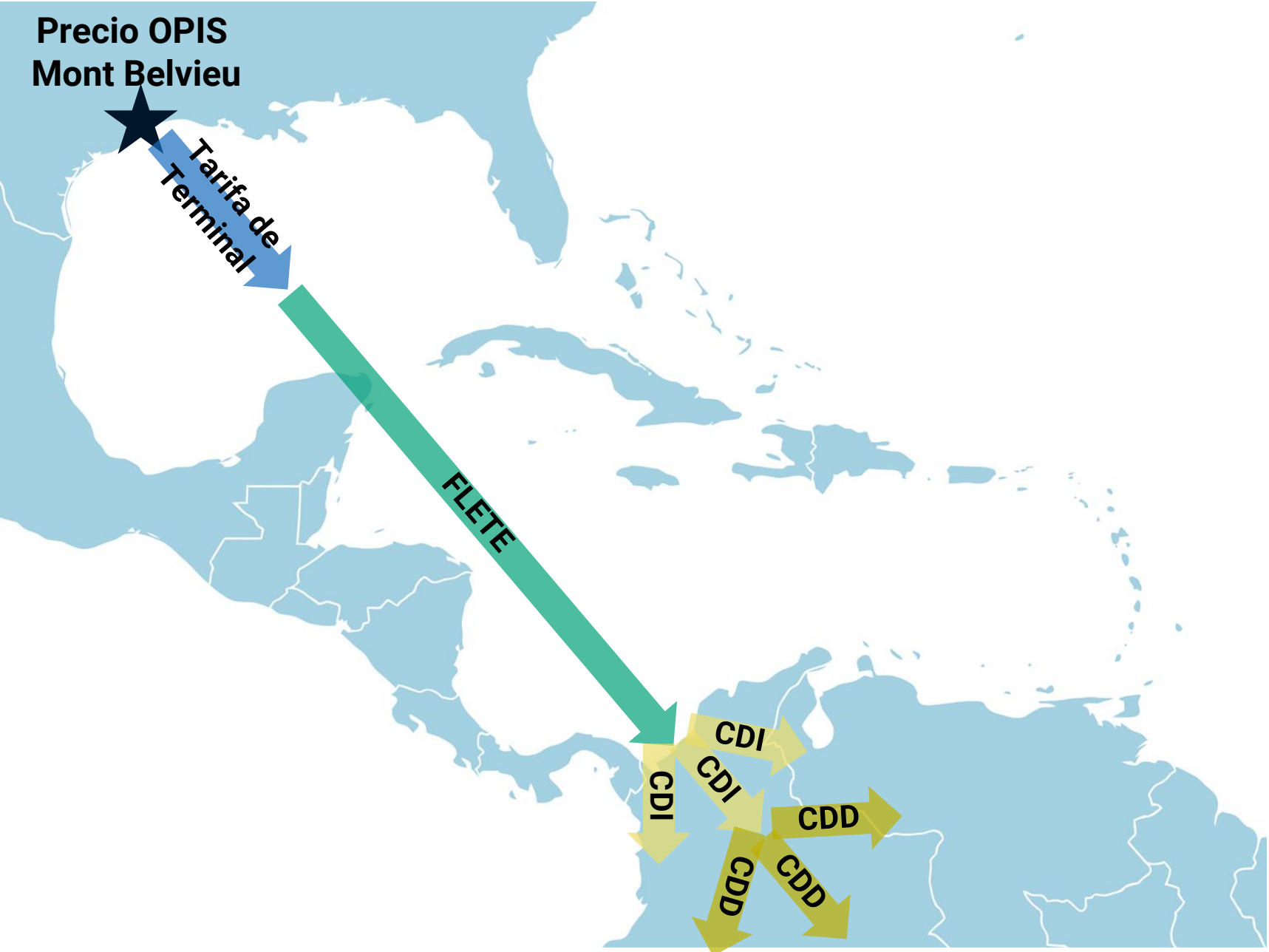


Comercio global: De Mont Belvieu para el mundo...



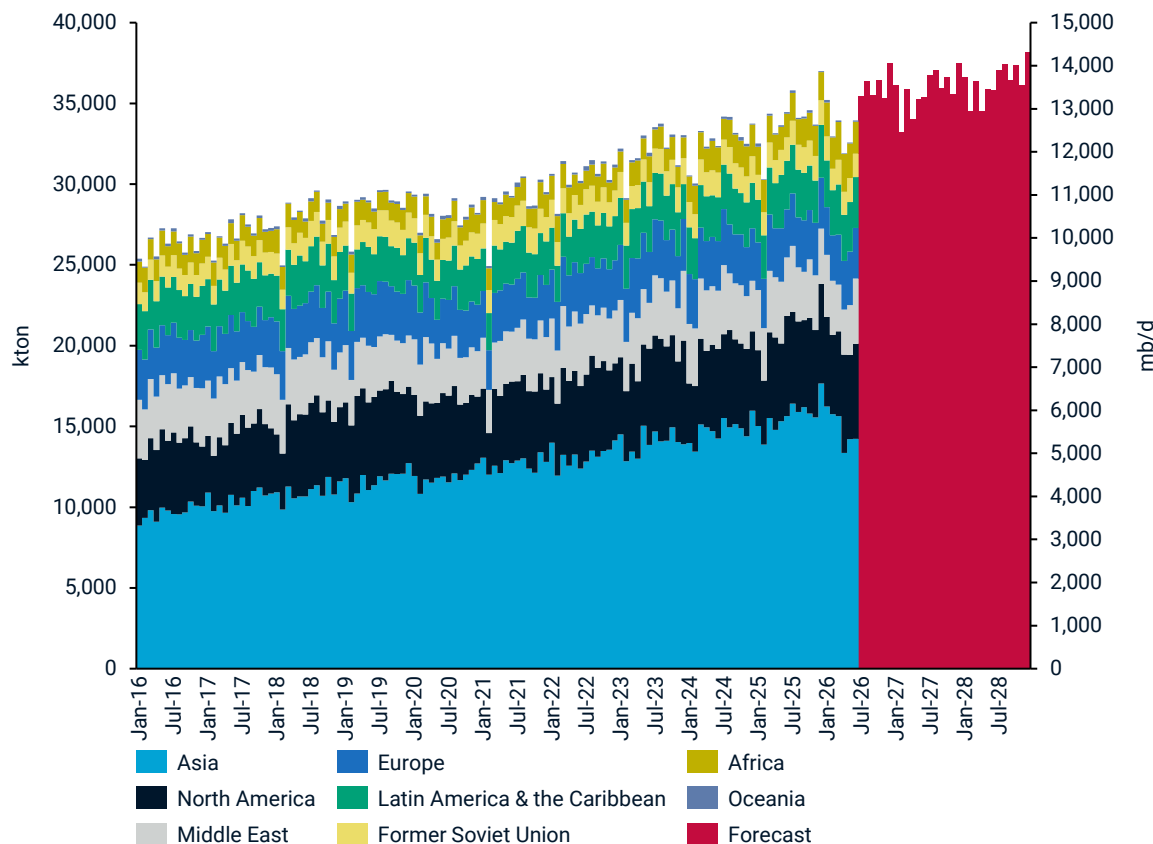
Source: OPIS Global LPG Outlook

La formulacion del precio al consumidor



El crecimiento asiático desempeña un papel crítico en el balance entre la nueva oferta y la demanda global

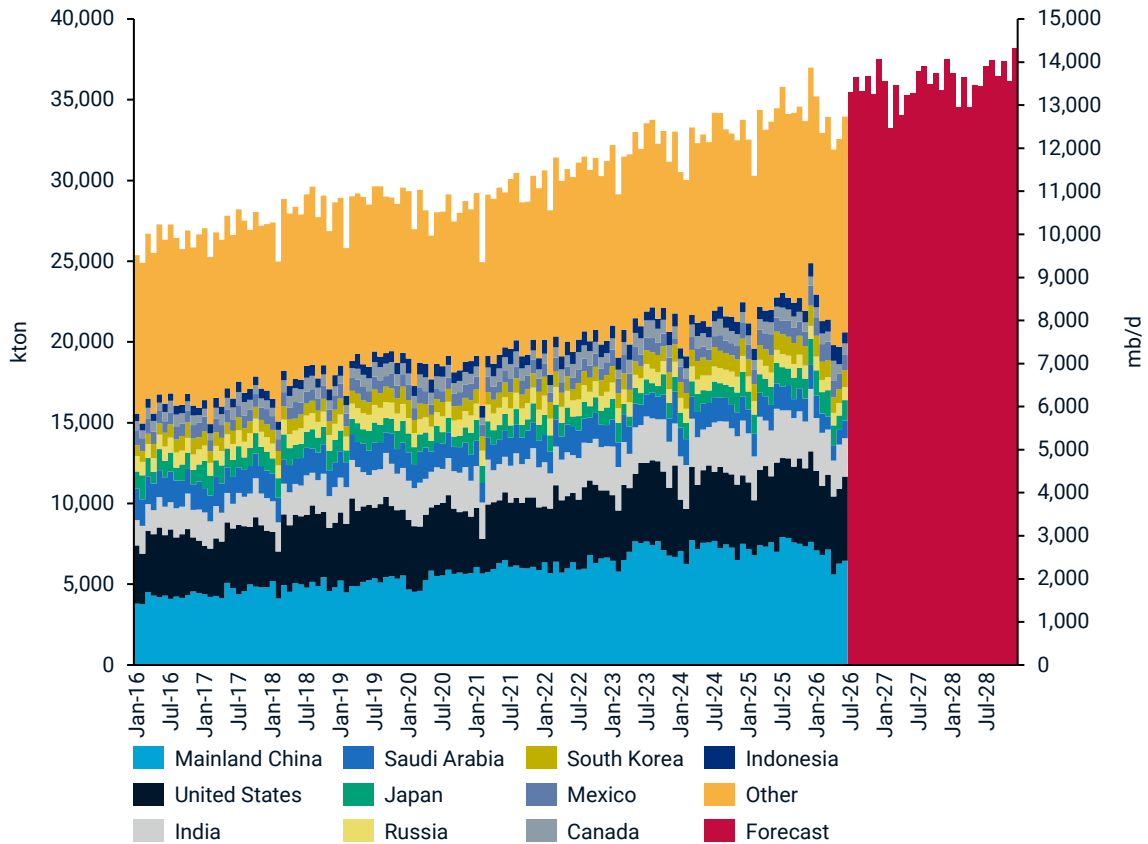
Regional balances: consumption by region



Source: OPIS, A Dow Jones Company

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Regional balances: consumption by country

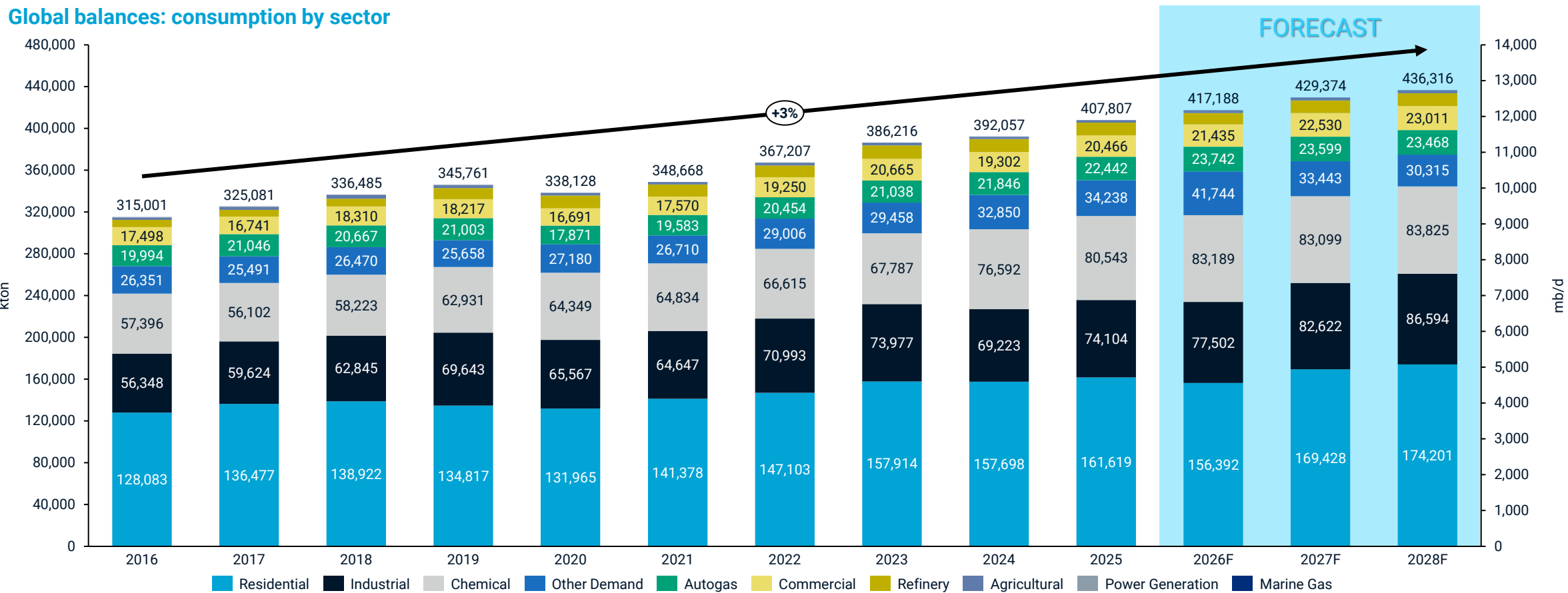


Source: OPIS, A Dow Jones Company

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Consumo global de GLP: Por sector

La demanda mundial de GLP ya supera los 400 millones de toneladas anuales.



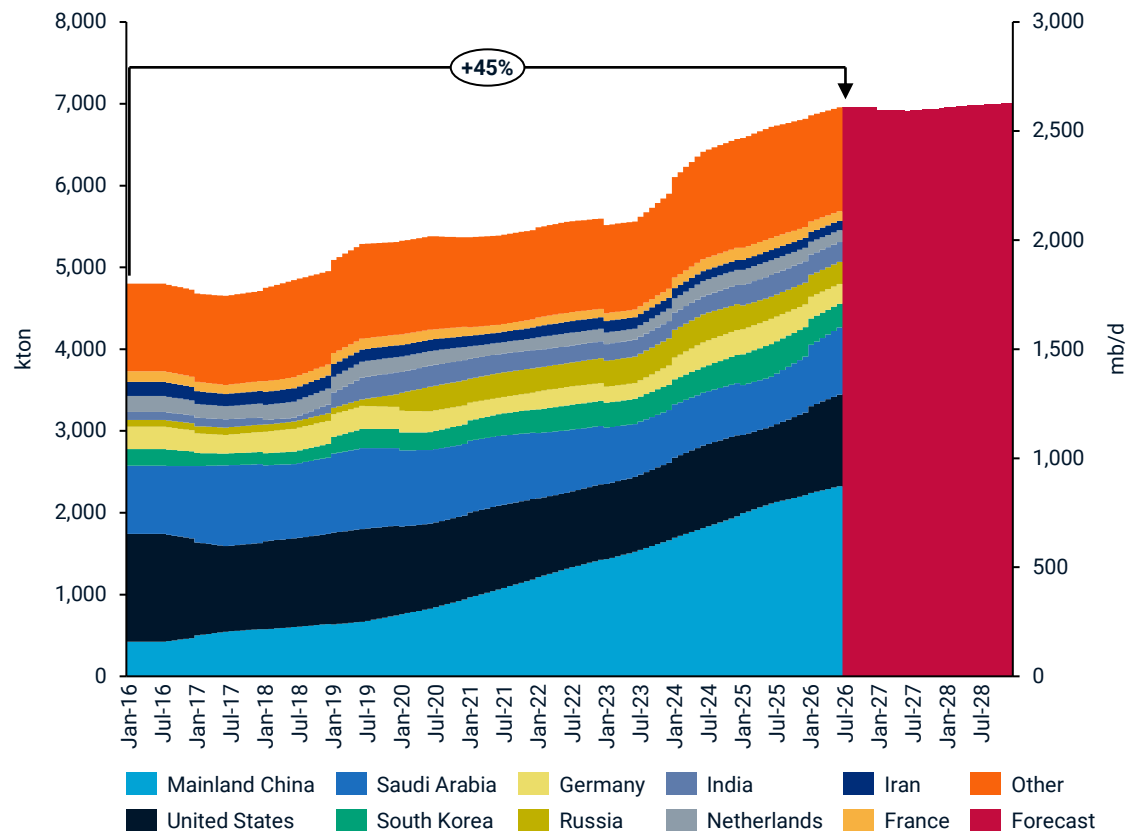
Source: OPIS, A Dow Jones Company

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La demanda petroquímica de GLP: en pausa

Los altos costos de las materias primas comprimen los márgenes y frenan la utilización de PDH en Asia

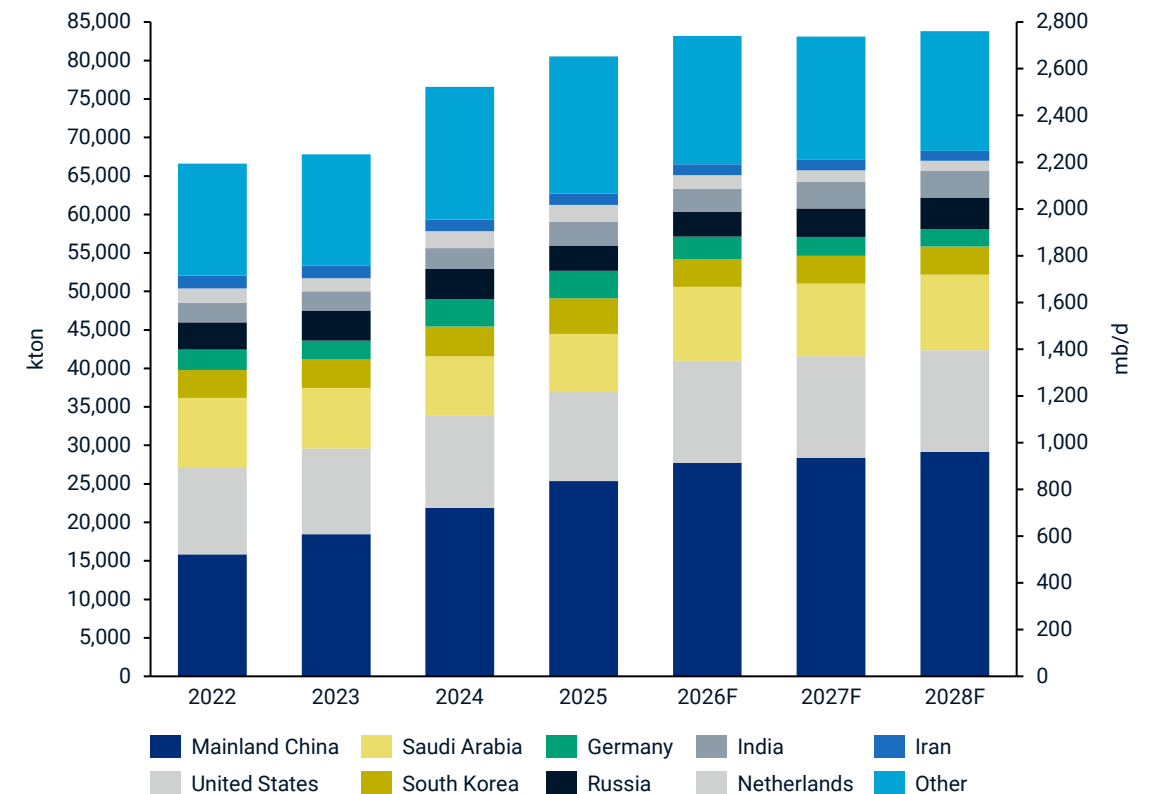
Global LPG: chemical demand by country



Source: OPIS, A Dow Jones Company

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Global LPG: chemical demand by country by year



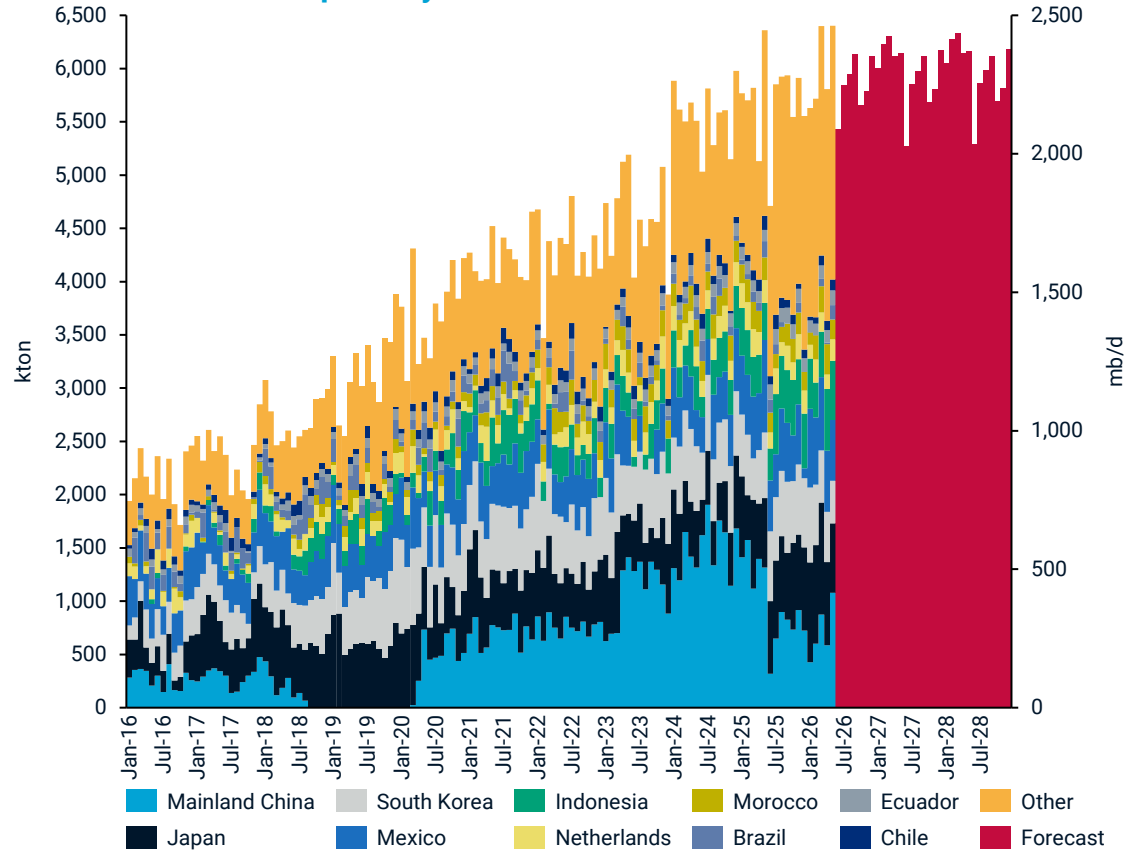
Source: OPIS, A Dow Jones Company

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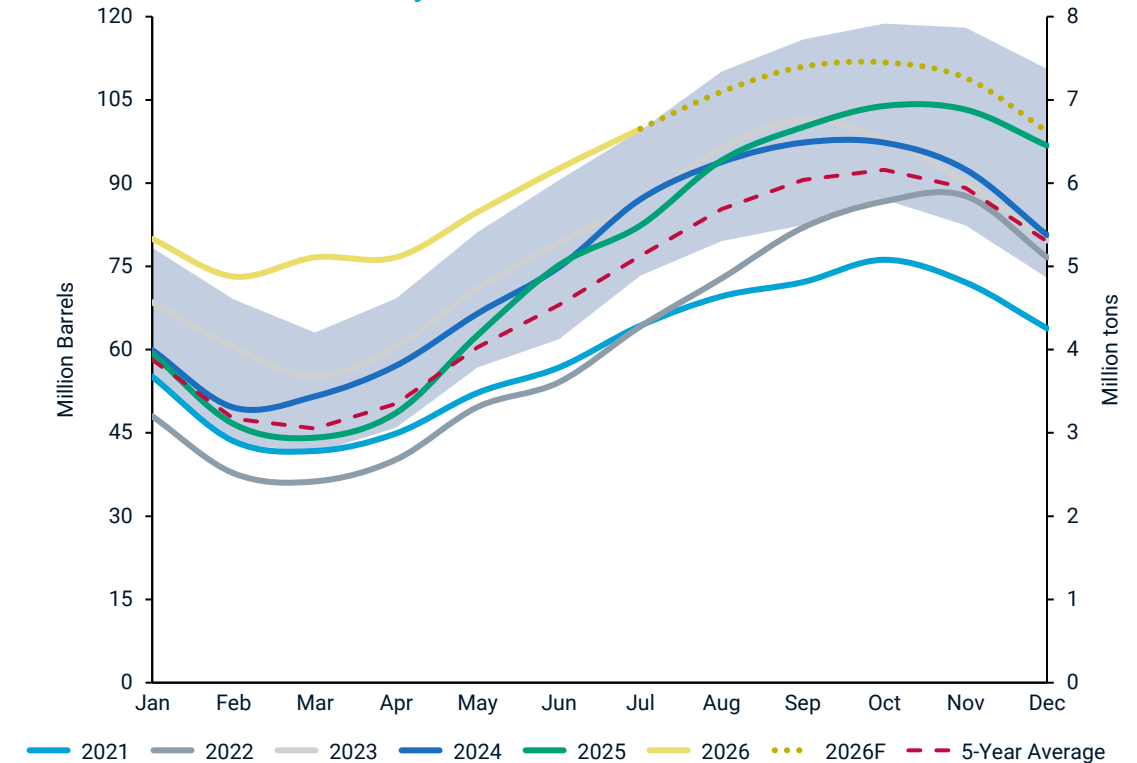
Exportaciones estadounidenses de GLP

Estados Unidos se ha convertido en el principal proveedor incremental del mercado mundial

United States: LPG exports by destination



United States LPG inventory



Source: OPIS, A Dow Jones Company

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Evaluación del mercado de Gas LP

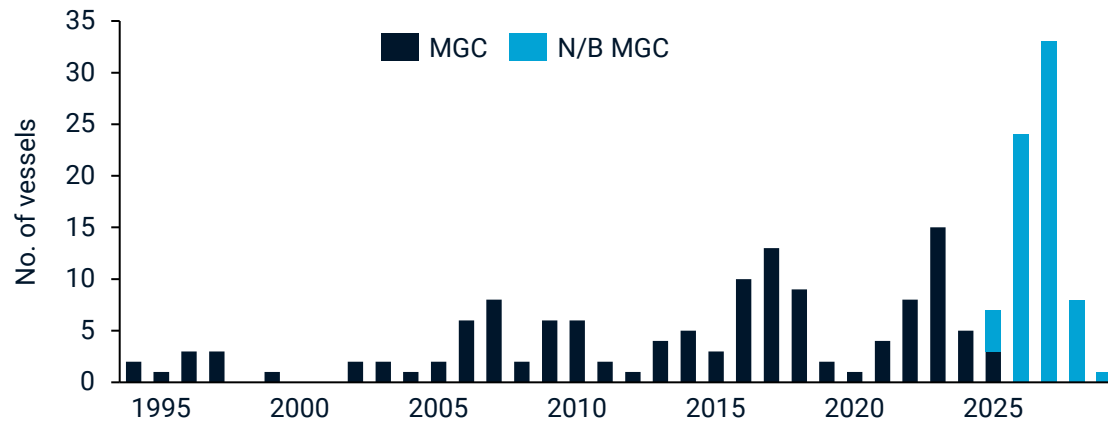


Oferta Disponibilidad del Producto	Producción Estados Unidos
	Producción Medio Oriente
Logística Capacidad de mover el producto	Mercado de Fletes
	Tarifa de Terminal
Demanda Capacidad de consumir el producto	Demanda RCI+
	Demanda Petroquímica
Precios Efecto en Precios	Precios (Contrato)
	Precios (Spot)

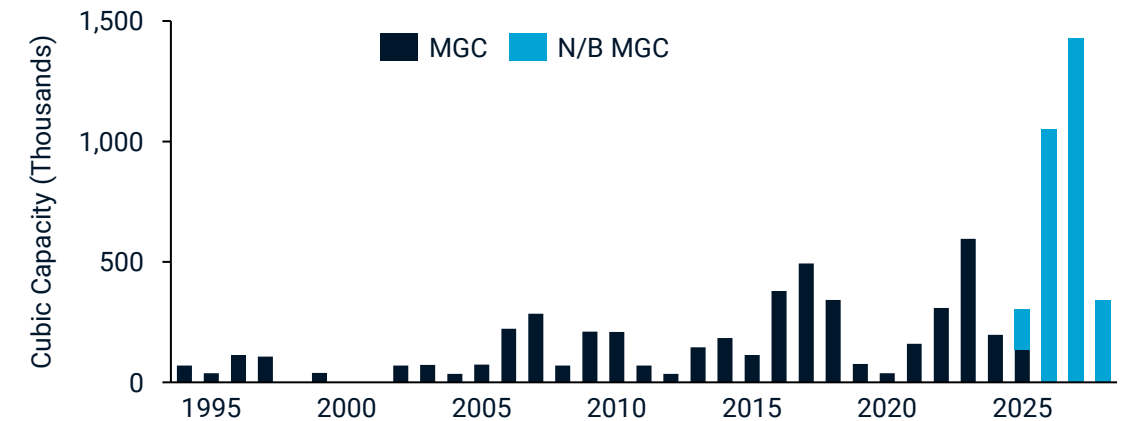
Composición del flota marítima:

Una nueva ola de buques entra en servicio y amplía la capacidad de transporte internacional

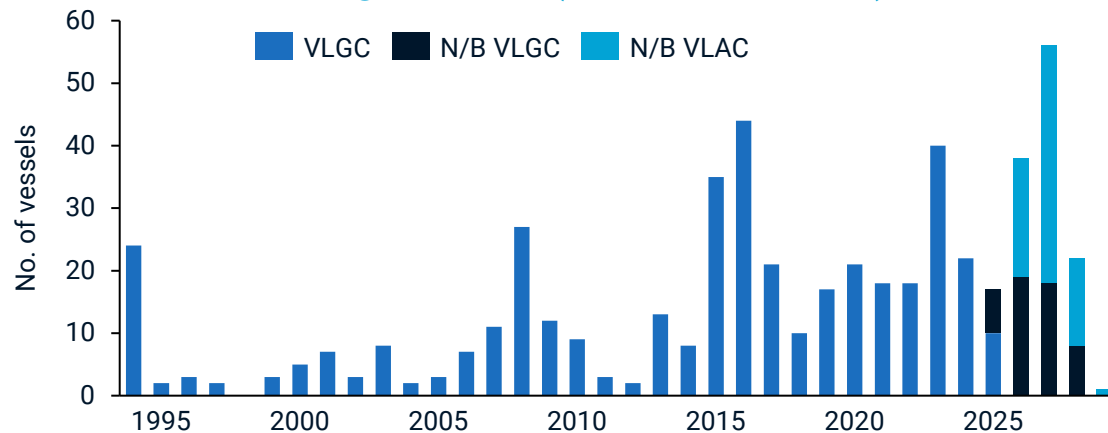
MGC Fleet Age Profile (Number of units)



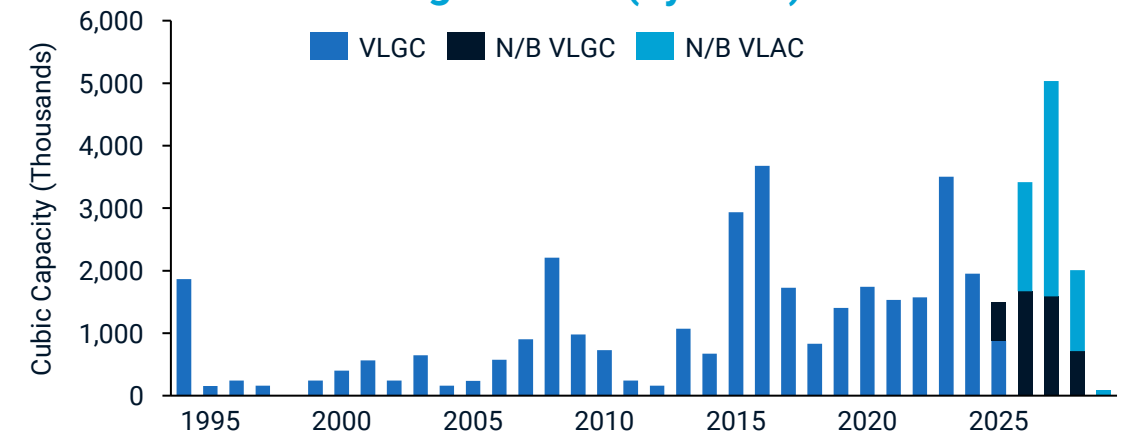
MGC Fleet Age Profile (by CBM)



VLGC/VLAC Fleet Age Profile (Number of units)



VLGC/VLAC Fleet Age Profile (by CBM)

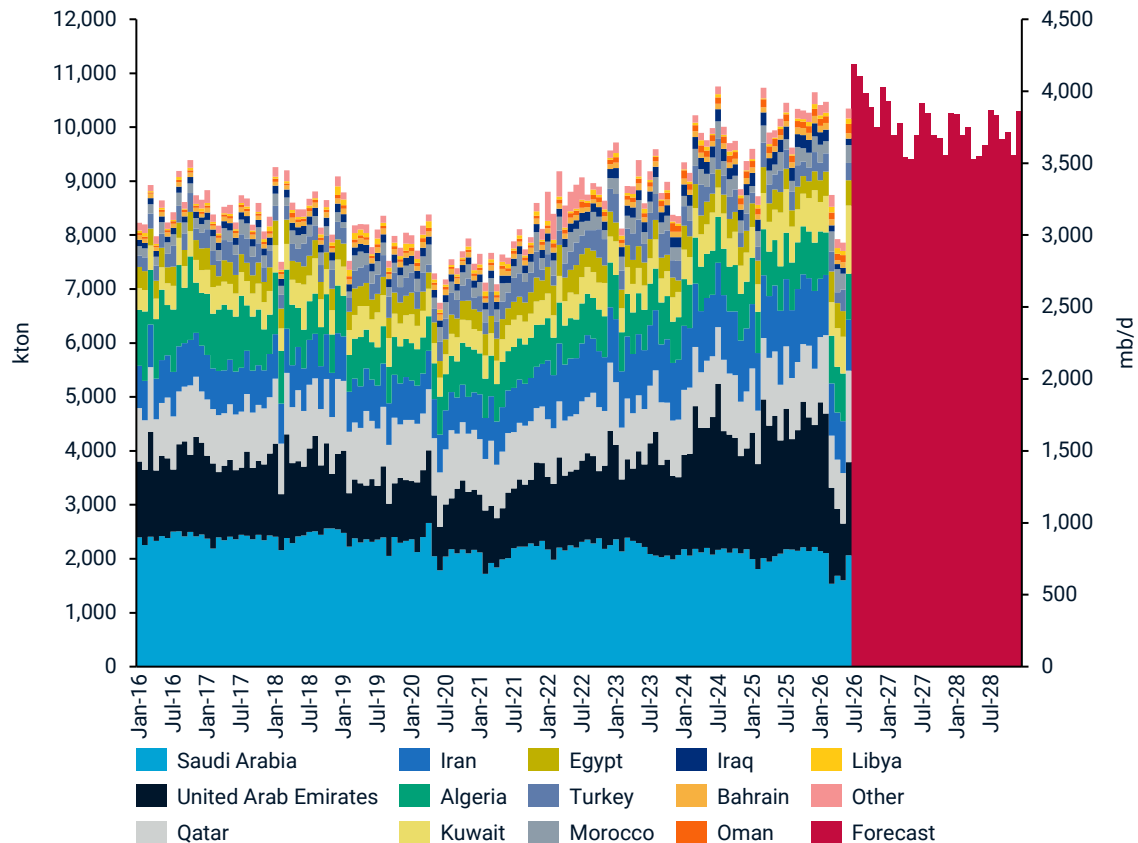


Source: OPIS, Braemar Markets

Medio Oriente acelera su producción de GLP

La oferta de MENA crecerá hacia 2027, impulsada principalmente por el procesamiento de gas

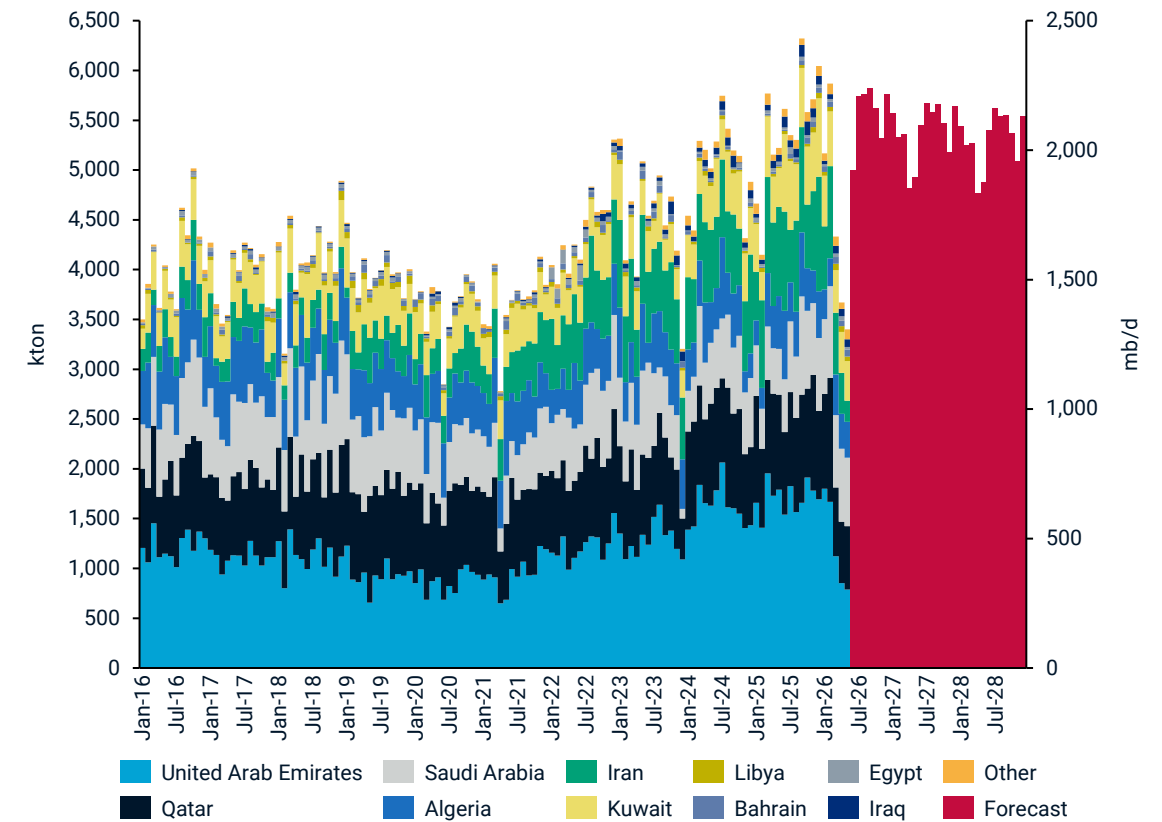
Middle East & North Africa: LPG production by country



Source: OPIS, A Dow Jones Company

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Middle East & North Africa: LPG exports by source



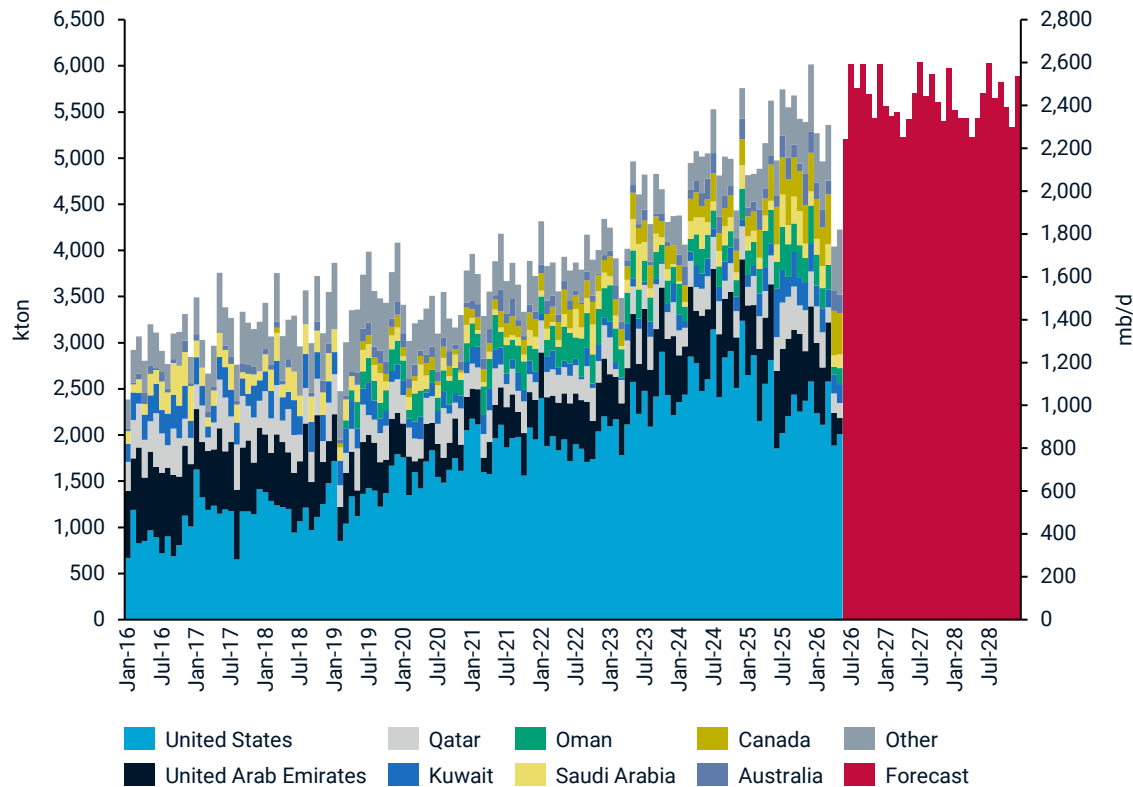
Source: OPIS, A Dow Jones Company

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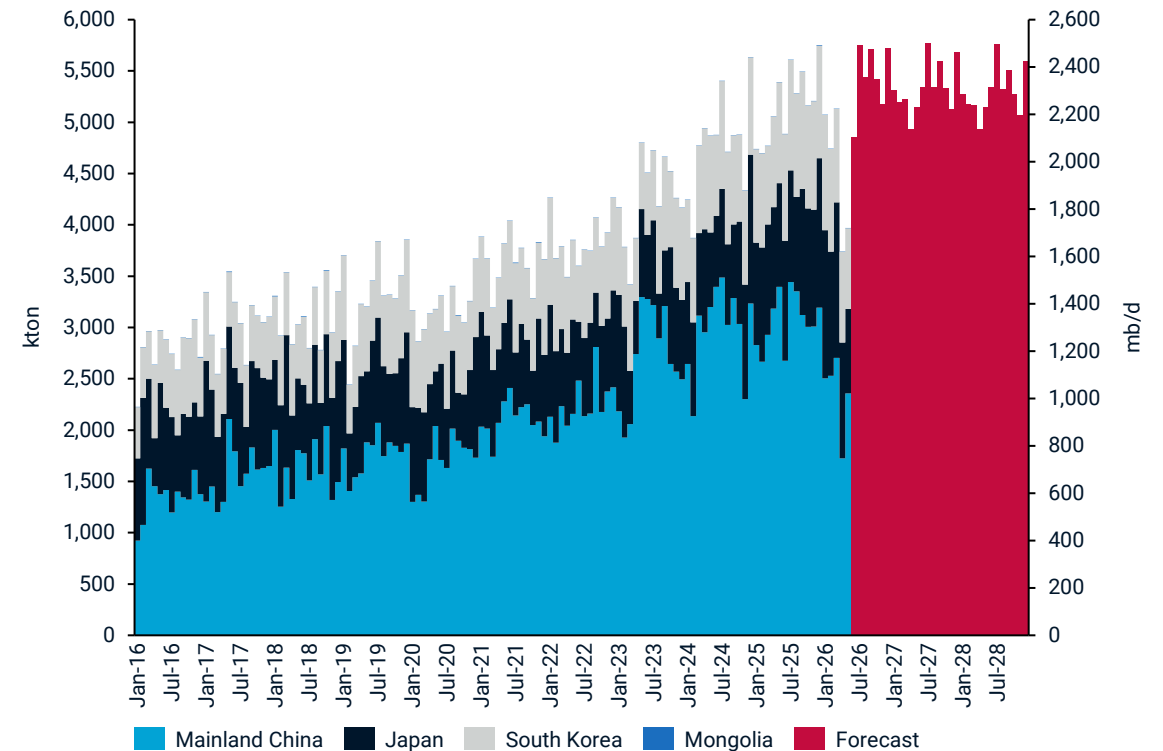
Estados Unidos domina el suministro hacia el noreste de Asia

El GLP estadounidense se ha convertido en una fuente fundamental para China, Japón y Corea del Sur

Northeast Asia imports by origin



Northeast Asia imports by destination





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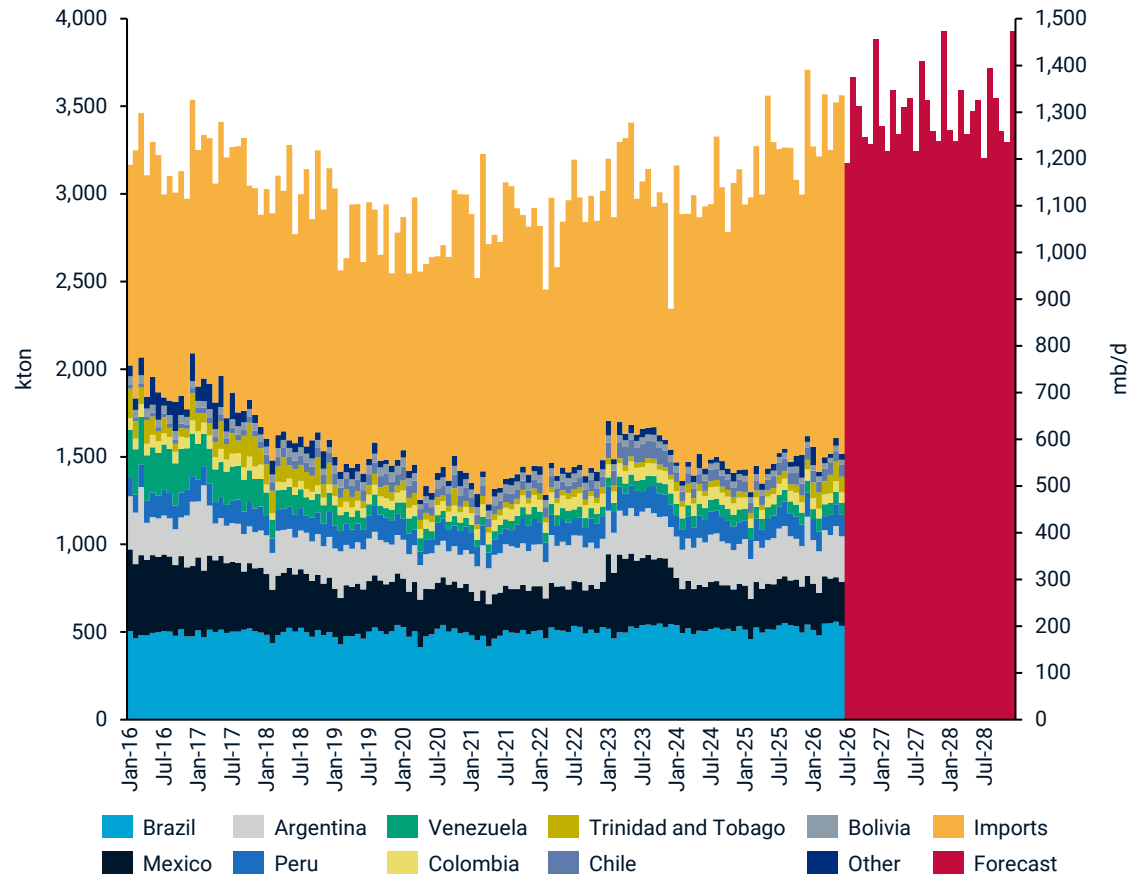
América Latina

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América Latina: un mercado estructuralmente deficitario

La caída de la producción en México y Venezuela limita el crecimiento de la oferta regional

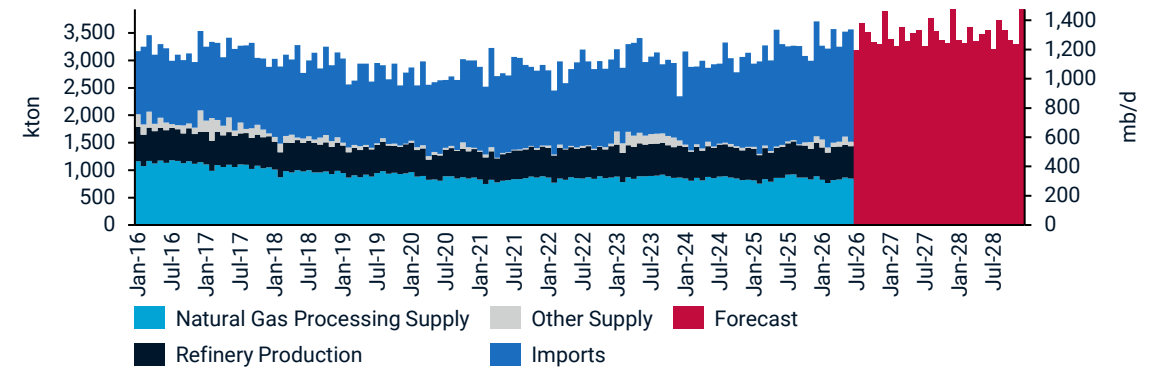
Latin America: supply by country



Source: OPIS, A Dow Jones Company

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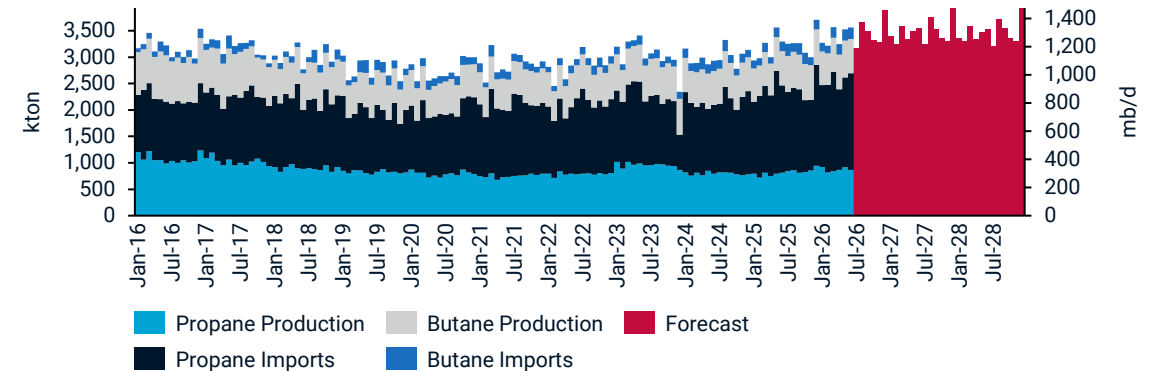
Latin America: supply by source



Source: OPIS, A Dow Jones Company

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Latin America: supply by product



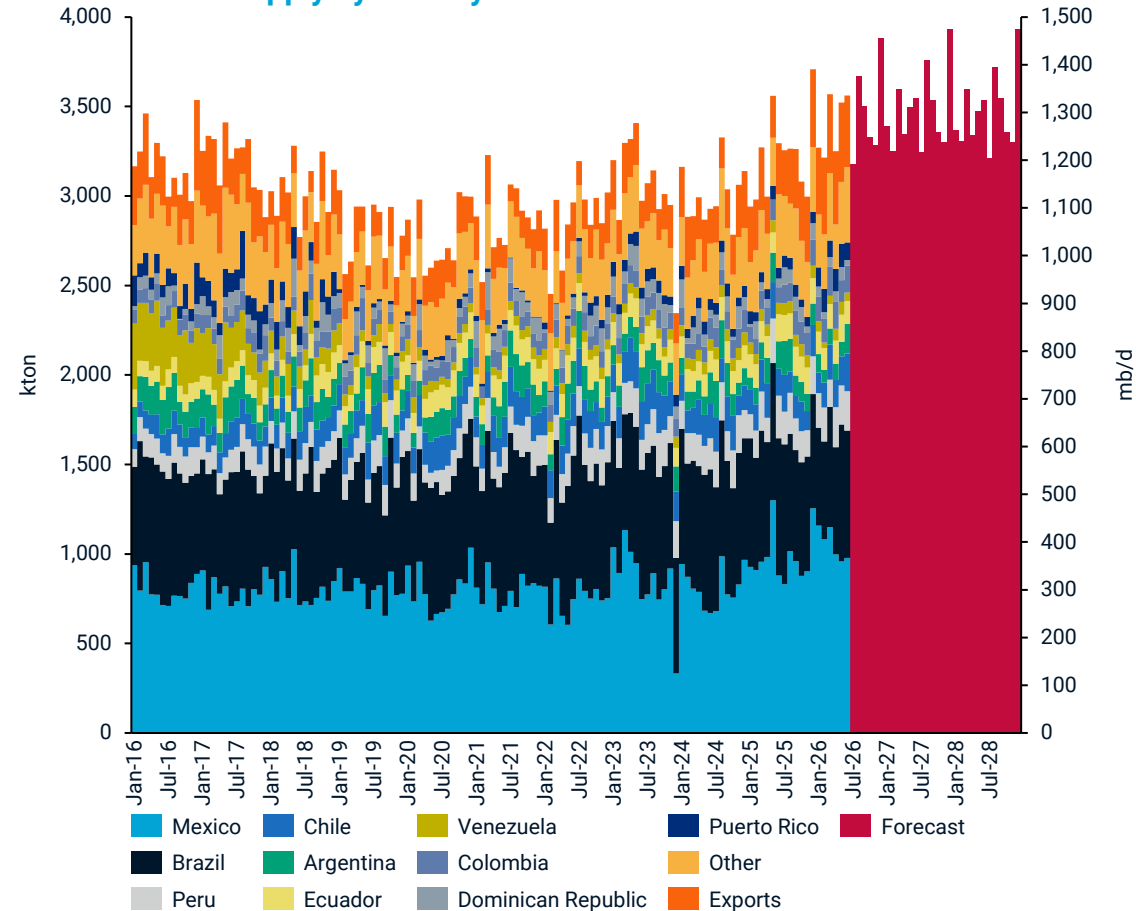
Source: OPIS, A Dow Jones Company

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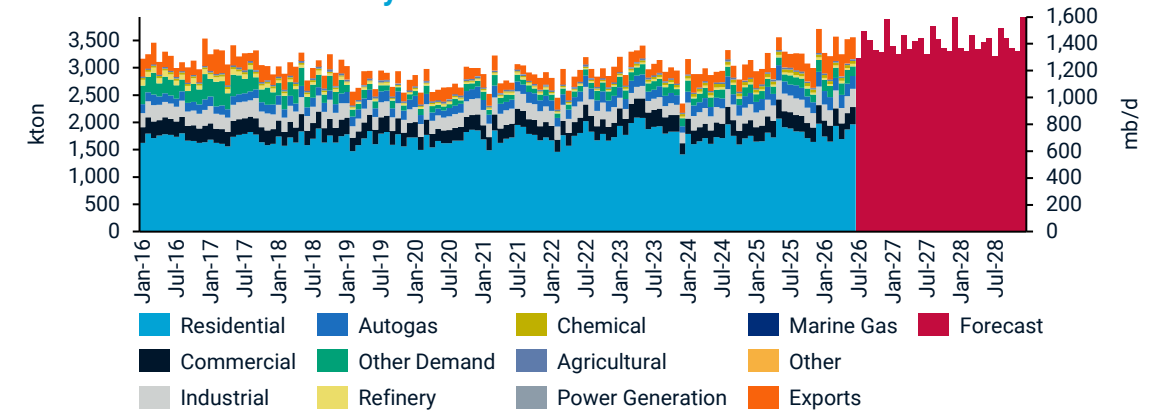
Balance regional: demanda

El consumo se mantiene resiliente a pesar de las diferencias económicas y estructurales entre países

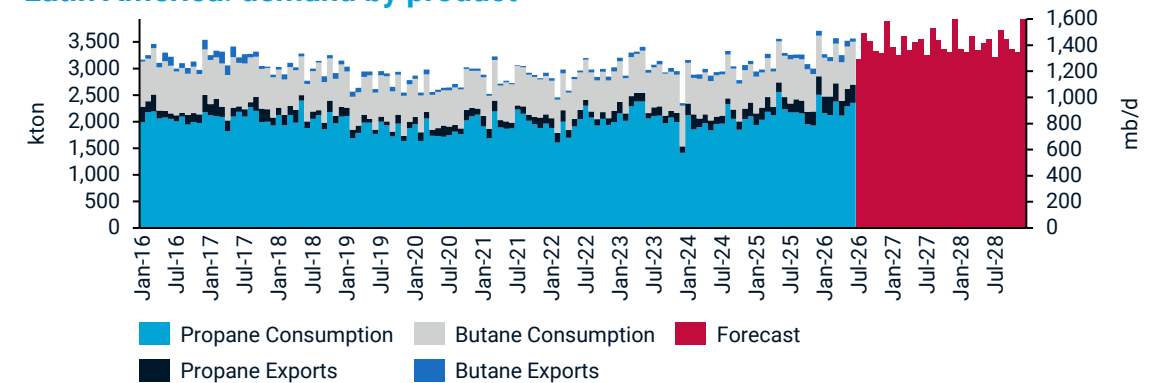
Latin America: supply by country



Latin America: demand by sector

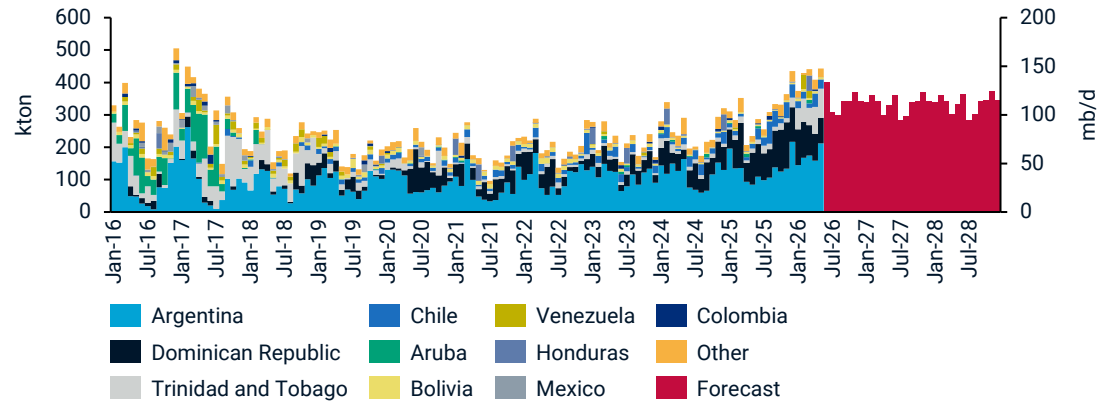


Latin America: demand by product



Las importaciones latinoamericanas continúan aumentando mientras las exportaciones permanecen reducidas y fragmentadas

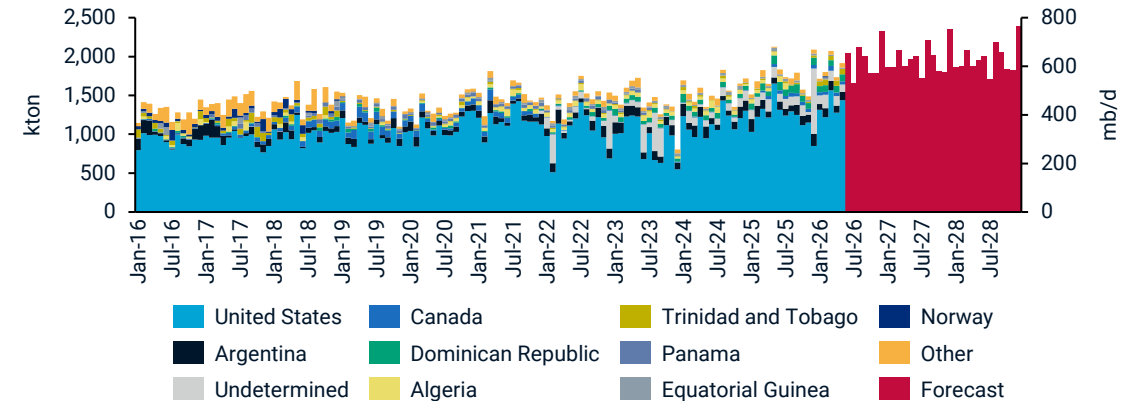
Latin America: LPG exports by origin



Source: OPIS, A Dow Jones Company

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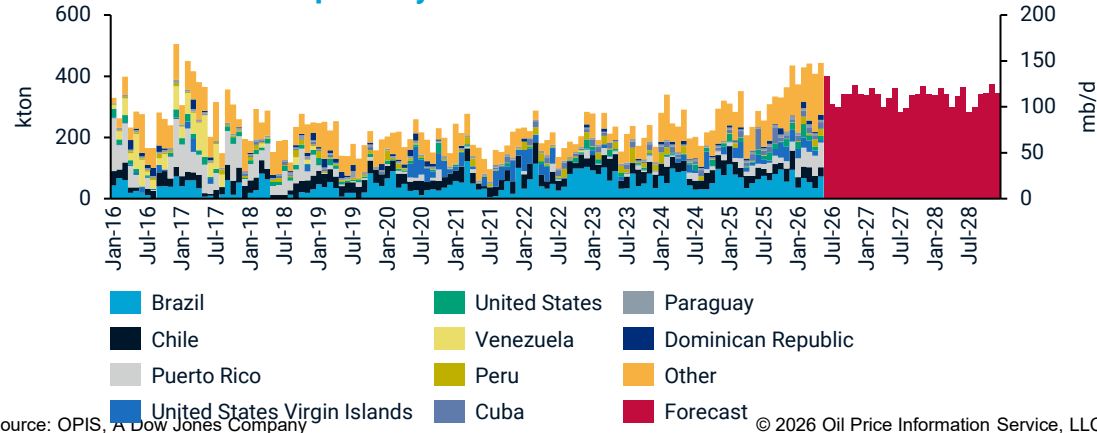
Latin America: LPG imports by origin



Source: OPIS, A Dow Jones Company

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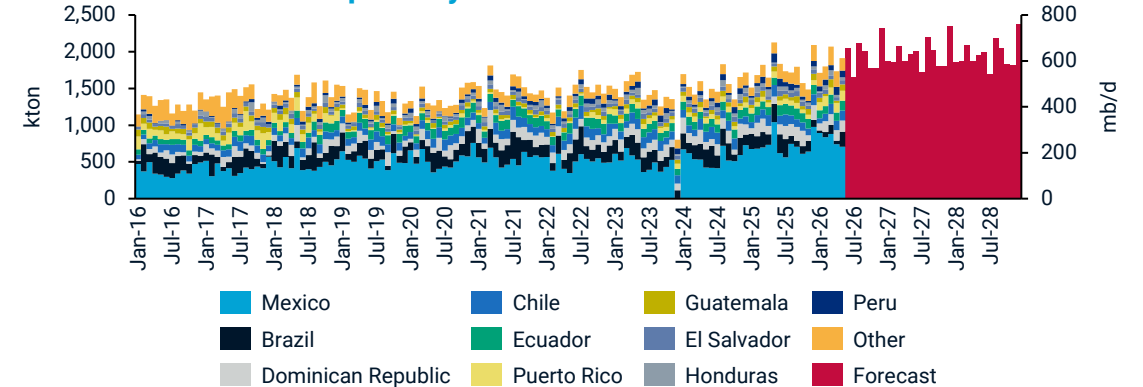
Latin America: LPG exports by destination



Source: OPIS, A Dow Jones Company

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Latin America: LPG imports by destination



Source: OPIS, A Dow Jones Company

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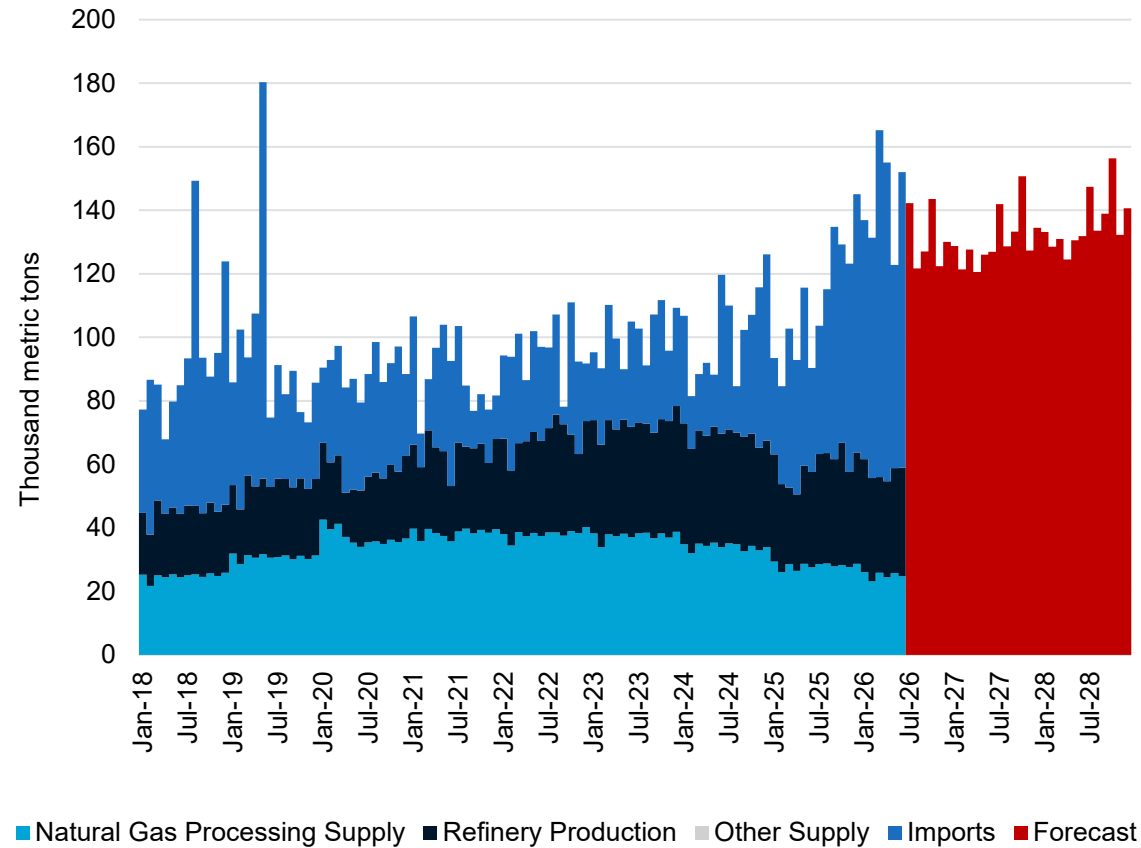


Colombia

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¿Puede la oferta nacional acompañar el crecimiento de la demanda?

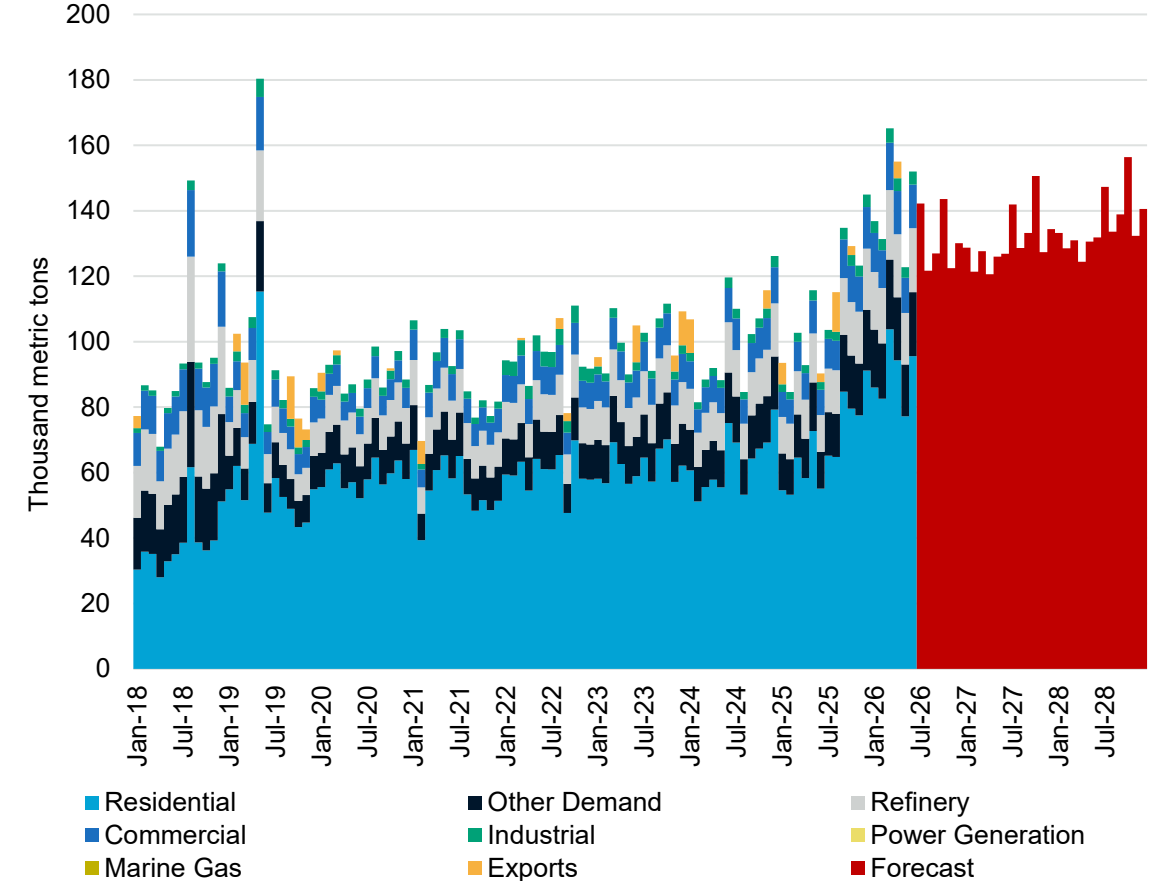
Colombia LPG production by source



Source: OPIS, A Dow Jones Company

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Colombia LPG demand by sector



Source: OPIS, A Dow Jones Company

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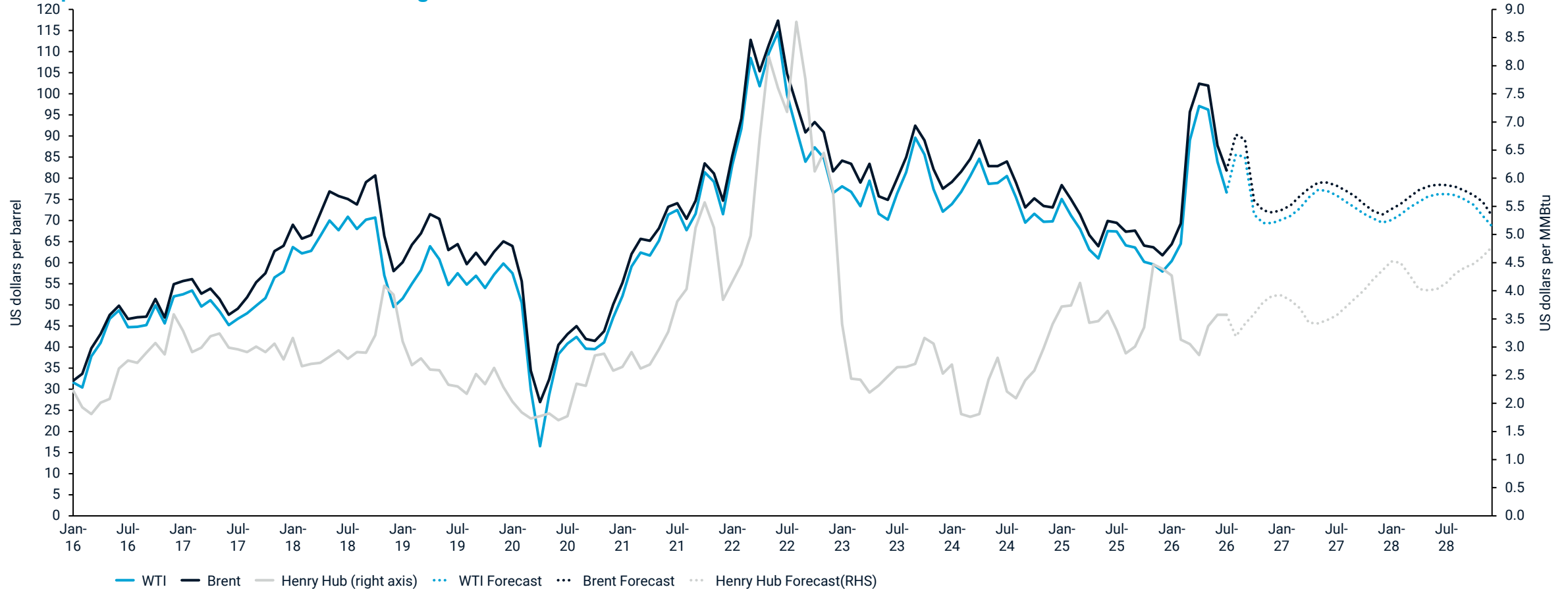


Precios

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Energy markets hold elevated risk premiums on persistent conflict despite active diplomacy

NGL price drivers: Crude oil and natural gas



Source: OPIS, A Dow Jones Company

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Evaluación del mercado de Gas LP



		Previa	Actual	Futura
Oferta Disponibilidad del Producto 	Producción Estados Unidos			
	Producción Medio Oriente			
Logística Capacidad de mover el producto 	Mercado de Fletes			
	Tarifa de Terminal			
Demanda Capacidad de consumir el producto 	Demanda RCI			
	Demanda Petroquímica			
Precios Efecto en Precios 	Precios (Contrato)			
	Precios (Spot)			



2026

Global LPG Conference



November 4-5, 2026

The Royal Sonesta Houston
Galleria, Houston, Texas, U.S.

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Panorama Latinoamericano 2026

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FEATURING:

Fabrizio Duarte
President, AIGLP





Adrian Calcano
VP, Global LPG & Feedstocks, OPIS,
A Dow Jones Company

GLP en Conexión Mercados, geopolítica y el futuro del GLP en América Latina

¿Qué está transformando el mercado de GLP en la región?

Una conversación sobre las tendencias y fuerzas que están definiendo el panorama energético:

Mercados · Dinámicas de oferta, demanda y precios

Geopolítica · Riesgos globales y su impacto en América Latina

Perspectivas · Oportunidades y desafíos para el futuro del GLP

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La mejor cobertura del mercado global: GLOBAL LPG OUTLOOK

• Cobertura del Servicio (3 reportes)

■ Reporte Semanal – Próximos 100 Días

- Pronóstico de precios de referencia a 100 días
- Comercio internacional detallado con flete.
- Comentarios y análisis del mercado
- Análisis de niveles clave de inventario

■ Reporte Mensual – Próximos 18 a 36 Meses

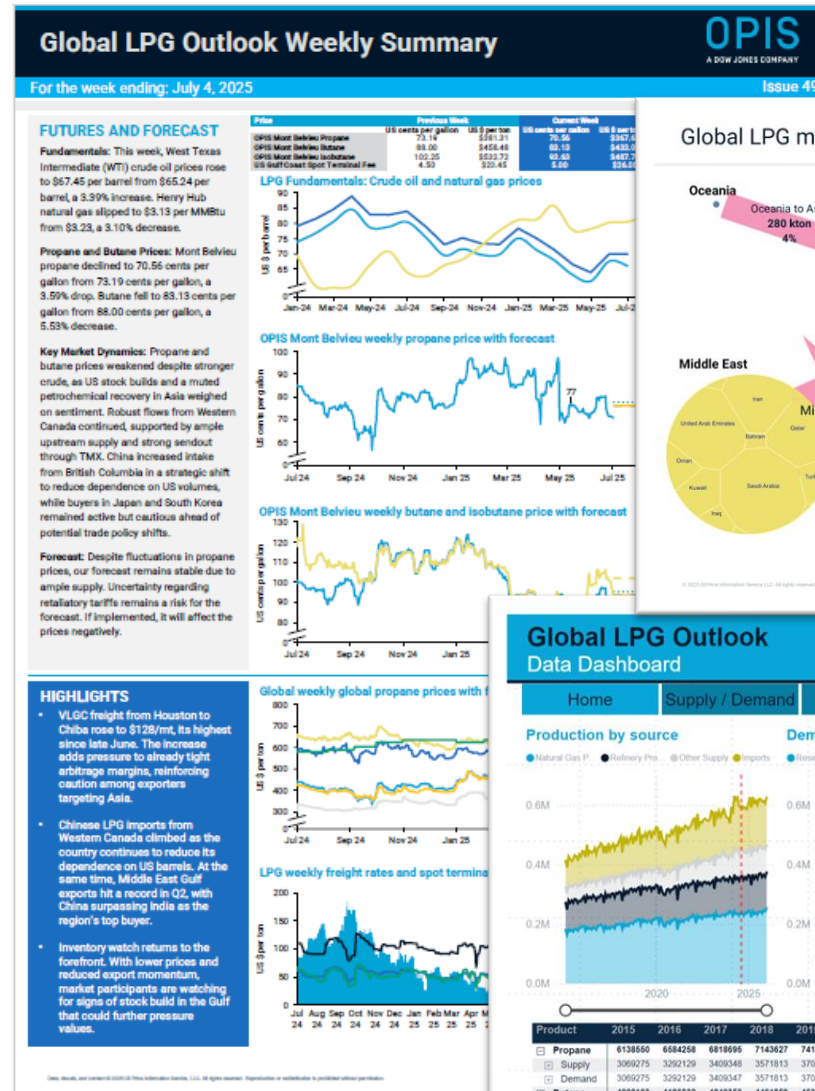
- Pronóstico de precios para los próximos 18 a 30 meses
- Oferta y demanda global de mas de 200 países
- Comercio y flujos internacionales detallados
- Análisis detallando del entorno global
- Análisis y pronóstico de niveles de inventario

■ Reporte Semestral – Hasta el Año 2060

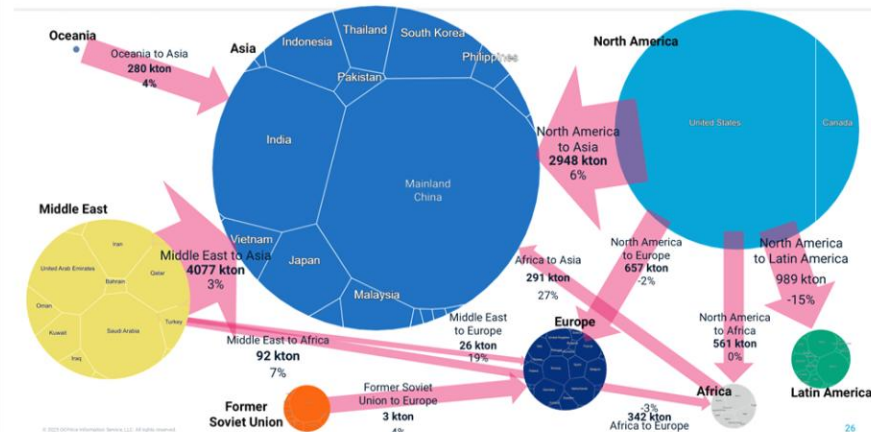
- Pronóstico de oferta y demanda global por país
- Pronóstico de precios hasta el 2060

■ Dashboard Interactivo

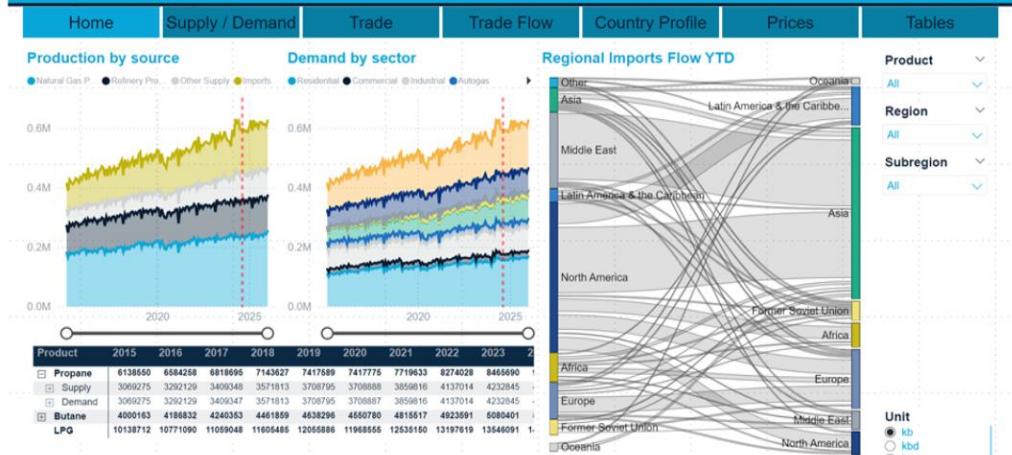
- Consulta y descarga de toda la información en tiempo real



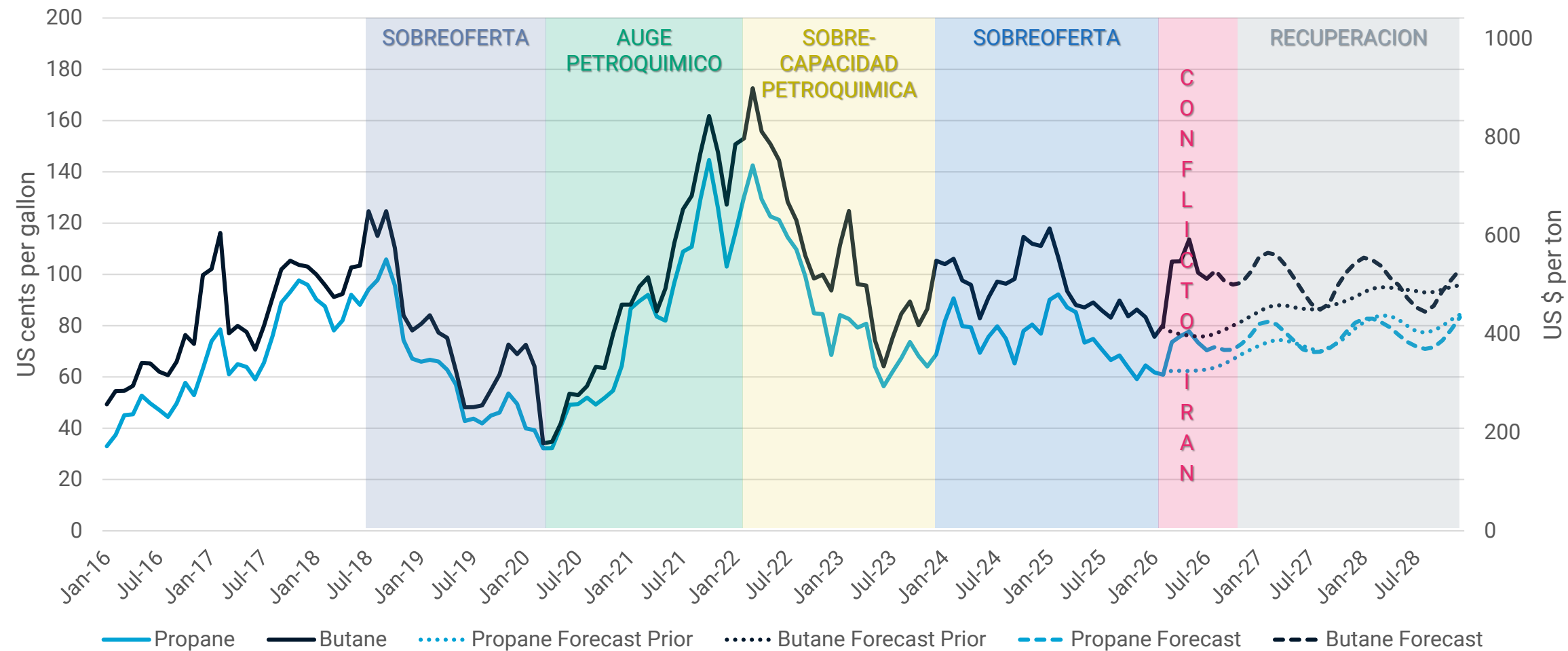
Global LPG monthly trade flow



Global LPG Outlook
Data Dashboard



OPIS Mont Belvieu price with forecast



- **Más producción en Estados Unidos y Medio Oriente**
 - **Más comercio marítimo**
 - **Asia absorbe gran parte del crecimiento**
 - **América Latina depende cada vez más de las importaciones**
 - **Colombia está cada vez más expuesta al mercado internacional**
-
- **Entender estos vínculos será fundamental para anticipar los precios, los riesgos y las oportunidades del mercado latinoamericano de GLP.**



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