



# HÖEGH LNG PARTNERS LP

Interim Financial Statements  
for the quarterly period ended 31 March 2026



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## INTERIM UNAUDITED CONSOLIDATED STATEMENTS OF INCOME

USD '000	Notes	Three Months Ended	
		31 March	
		2026	2025
Time charter revenues	3.1	36,453	37,896
Share of results from investments in joint ventures	4	4,656	4,249
Other income, net		33	315
<b>Total income</b>		<b>41,142</b>	<b>42,460</b>
Vessel operating expenses	3.1	(7,898)	(8,508)
Administrative expenses	3.1	(1,166)	(1,215)
<b>Operating profit before depreciation and amortisation (EBITDA)</b>		<b>32,078</b>	<b>32,737</b>
Depreciation and amortisation		(7,480)	(7,449)
<b>Operating profit</b>		<b>24,598</b>	<b>25,288</b>
Interest income		93	367
Interest expenses		(2,609)	(3,672)
Income from other financial items		194	(416)
Expenses from other financial items		(619)	442
<b>Net financial items</b>		<b>(2,941)</b>	<b>(3,279)</b>
<b>Profit before tax</b>		<b>21,657</b>	<b>22,009</b>
Income tax	6	(2,405)	(1,797)
<b>Profit for the period after tax</b>		<b>19,252</b>	<b>20,212</b>
Preferred unitholders' interest in profit for the period		3,114	3,877
Limited partners' interest in profit for the period		16,138	16,335

## INTERIM UNAUDITED CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME

USD '000	Three months ended	
	31 March	
	2026	2025
<b>Profit for the period</b>	19,252	20,212
<b>Items that will not be reclassified to loss</b>		
Net loss on other capital reserves		
<b>Items that may be subsequently reclassified to profit</b>		
Net unrealised gains (losses) on cash flow hedge	(175)	(2,927)
Share of other comprehensive income from joint ventures	1,219	1,014
<b>Other comprehensive loss for the period net of tax</b>	<b>1,044</b>	<b>(1,913)</b>
<b>Total comprehensive income for the period net of tax</b>	<b>20,296</b>	<b>18,299</b>
Preferred unitholders' interest in total comprehensive income	3,114	3,877
Limited partners' interest in total comprehensive income	17,182	14,422

## INTERIM UNAUDITED CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

USD '000	Notes	31 Mar 2026	31 Dec 2025
<b>Assets</b>			
<b>Non-current assets</b>			
Deferred tax assets	6	599	599
Vessels and spare parts		744,290	751,026
Right-of-use assets		77	93
Investments in joint ventures	4	109,558	103,686
Other non-current assets		2,699	3,059
<b>Total non-current assets</b>		<b>857,223</b>	<b>858,463</b>
<b>Current assets</b>			
Bunkers and inventories		18	18
Trade and other receivables		18,905	8,416
Investment in marketable securities		297	268
Cash and cash equivalents		26,542	40,364
<b>Total current assets</b>		<b>45,762</b>	<b>49,066</b>
<b>Total assets</b>		<b>902,985</b>	<b>907,529</b>
<b>Partner's capital and liabilities</b>			
<b>Partner's capital</b>			
8.75% Series A preferred units	10	141,406	141,406
Common units	10	340,990	340,990
Accumulated other comprehensive income (loss)		(7,476)	(8,520)
Retained earnings		180,239	176,101
<b>Total partners' capital</b>		<b>655,159</b>	<b>649,977</b>
<b>Non-current liabilities</b>			
Deferred tax liabilities		25,447	24,844
Non-current interest-bearing debt	7	134,643	143,571
Other non-current financial liabilities		339	362
Deferred revenues		24,840	26,128
<b>Total non-current liabilities</b>		<b>185,269</b>	<b>194,905</b>
<b>Current liabilities</b>			
Current interest-bearing debt	7	37,423	37,573
Income tax payable		11,500	10,134
Trade and other payables		3,196	3,695
Other current liabilities		10,438	11,245
<b>Total current liabilities</b>		<b>62,557</b>	<b>62,647</b>
<b>Total liabilities</b>		<b>247,826</b>	<b>257,552</b>
<b>Total liabilities and equity</b>		<b>902,985</b>	<b>907,529</b>

## INTERIM UNAUDITED CONSOLIDATED STATEMENTS OF CASH FLOWS

USD '000	Three months ended 31 March	
	2026	2025
<b>Cash flows from operating activities:</b>		
Profit for the period before tax	21,657	22,009
<i>Adjustments to reconcile profit (loss) before tax to net operational cash flows</i>		
Depreciation	7,480	7,449
Interest income	(93)	(367)
Interest expenses	2,609	2,882
Net gain on discontinued interest rate hedges	(174)	(790)
Loss (gain) on exchange and other non-cash adjustments	15	(221)
Share of results from investments in joint ventures	(4,656)	(4,249)
<i>Working capital adjustments</i>		
Change in receivables, payables, deferrals and provisions	(12,775)	(4,674)
Payment of corporate income tax	(433)	(1,847)
<b>I) Net cash flows from operating activities</b>	<b>13,630</b>	<b>20,192</b>
<b>Cash flows from investing activities:</b>		
Investment in FSRUs, assets under construction and class renewals	(744)	(44)
Dividend received on investment in joint ventures	—	1,500
Interest received	93	—
<b>II) Net cash flows from investing activities</b>	<b>(651)</b>	<b>1,456</b>
<b>Cash flows from financing activities:</b>		
Cash distributions to limited partners and preferred unitholders	(15,114)	(33,877)
Interest paid on intragroup credit facility	(2,758)	(3,845)
Repayments of intragroup credit facility due to owners and affiliates	(8,929)	(8,929)
<b>III) Net cash flows used in financing activities</b>	<b>(26,801)</b>	<b>(46,651)</b>
<b>Net (decrease)/increase in cash and cash equivalents (I+II+III)</b>	<b>(13,822)</b>	<b>(25,003)</b>
Current cash and cash equivalents at the beginning of the period	40,364	64,420
<b>Current cash and cash equivalents as of 31 March</b>	<b>26,542</b>	<b>39,417</b>

## INTERIM UNAUDITED CONSOLIDATED STATEMENT OF CHANGES IN PARTNERS' CAPITAL

USD '000	Partners' Capital				
	8.75% Series A Preferred Units	Common Units Höegh Evi	Accumulated Other Comprehensive Income	Retained Earnings	Total
<b>Consolidated balance as of 01 January 2025</b>	<b>176,078</b>	<b>313,768</b>	<b>(4,890)</b>	<b>173,881</b>	<b>658,837</b>
Profit for the year	—	—	—	83,836	83,836
Cash distributions to preferred unitholders	—	—	—	(15,321)	(15,321)
Cash distributions to common unitholders	—	—	—	(73,500)	(73,500)
Other comprehensive income	—	—	(2,961)	(29)	(2,990)
Acquisition of preferred units October 2025	(34,672)	27,222	—	7,234	(216)
Other comprehensive income from investments in joint ventures	—	—	(669)	—	(669)
<b>Consolidated balance as of 31 December 2025</b>	<b>141,406</b>	<b>340,990</b>	<b>(8,520)</b>	<b>176,101</b>	<b>649,977</b>
Profit for the period	—	—	—	19,252	19,252
Cash distributions to preferred unitholders	—	—	—	(3,114)	(3,114)
Cash distributions to common unitholders	—	—	—	(12,000)	(12,000)
Other comprehensive income	—	—	(175)	—	(175)
Other comprehensive income from investments in joint ventures	—	—	1,219	—	1,219
<b>Consolidated balance as of 31 March 2026</b>	<b>141,406</b>	<b>340,990</b>	<b>(7,476)</b>	<b>180,239</b>	<b>655,159</b>

## **NOTES TO THE INTERIM UNAUDITED CONSOLIDATED FINANCIAL STATEMENTS**

### **1. Corporate information**

Höegh LNG Partners LP (the “Partnership”) is a Marshall Island limited partnership. The Partnership owns and operates floating storage and regasification units (“FSRUs”) providing LNG regasification services to customers under long-term time charter arrangements. The Partnership conducts its operations through wholly owned subsidiaries and joint ventures. As of 31 March 2026, the Partnership has a fleet of five FSRUs.

The Partnership is ultimately controlled by Höegh Evi Ltd., which owns 100% of the Partnership’s common units. Further information on the Partnership’s business and group structure can be found in the Partnership’s consolidated annual financial statements for the year ended 31 December 2025 (the “Annual Financial Statements for 2025”).

These interim consolidated financial statements were approved for publishing by the board of directors of Höegh LNG Partners LP on 19 May 2026.

### **2. Basis for preparation and accounting policies**

These interim consolidated financial statements have been prepared in accordance with IAS 34 Interim Financial Reporting as adopted by the EU. The accounting policies applied are consistent with those applied in the Partnership’s Annual Financial Statements for 2025, except for standards and interpretations effective for the current period. The interim condensed consolidated financial statements do not include all information and disclosures required for a complete set of annual financial statements and should be read in conjunction with the Annual Financial Statements for 2025. The financial statements are presented in US dollars, which is the Partnership’s functional and presentation currency.

### **3. Partnership business, operations and management**

#### **3.1 Time charter contracts**

The Partnership’s consolidated revenue comprises charter hire and related income from FSRUs and associated infrastructure. Revenue is recognised over time as services are rendered in accordance with contractual arrangements.

## Fleet overview and contract coverage

Vessel	Charterer	Current contract	Country	TCP	Expiry	Option
PGN FSRU Lampung	PT PGN LNG Indonesia	FSRU	Indonesia	20 years	Oct 2034	5 + 5 years
Höegh Gallant	Excelerate Energy	FSRU	USA	10 years	Nov 2031	1 year
Höegh Grace	Sociedad Portuaria El Cayao S.A.	FSRU	Colombia	40 years <sup>1</sup>	Dec 2056	-

### Accounted for as investments in joint ventures

Neptune	Total Gas & Power Ltd	FSRU	France	20 years	Nov 2029	5 + 5 years
Cape Ann	Total Gas & Power Ltd	FSRU	France	20 years	Jun 2030	5 + 5 years

1) The initial term of the Colombian charter for *Höegh Grace* was 20 years from late 2016. In December 2025 the contract was extended to 40 years since inception. However, the extended contract includes mutual options for termination every 5 years

### 3.2 Revenues, operating expenses and EBITDA

The following table summarise the revenues, operating expenses and EBITDA of the Partnership for the three months ended 31 March 2026 and 2025:

USD '000	Three Months Ended 31 March	
	2026	2025
Time charter revenues	36,486	38,211
Share of results from investments in joint ventures	4,656	4,249
<b>Total income</b>	<b>41,142</b>	<b>42,460</b>
Vessel operating expenses	(7,898)	(8,508)
Administrative expenses	(1,166)	(1,215)
<b>Operating profit before depreciation and amortisation (EBITDA)</b>	<b>32,078</b>	<b>32,737</b>

The EBITDA for the three months ended 31 March 2026 was USD 32.1 million which was USD 0.7 million less than for the three months ended 31 March 2025. The change is mainly driven by the expiry of previous make-whole agreement with Höegh Evi related to the *Höegh Gallant* (see Note 5), changes in variable elements of the time charter revenue from contracts as well as reduced operating expenses for the three months ended 31 March 2026.

#### 4. Investment in joint ventures

Investments in joint ventures are accounted for using the equity method. The carrying values reflect the Partnership's 50% share of net assets and results for the period.

USD'000	<b>31 Mar 2026</b>	<b>31 Dec 2025</b>
As of 1 January	103,686	83,181
Share of result	4,656	4,249
Other comprehensive income/(Loss) including (dividend distributions)	1,216	(16,256)
<b>As of end of period</b>	<b>109,558</b>	<b>103,686</b>

The bank debt of the joint ventures includes certain conditions for servicing shareholder loans or paying dividends to its shareholders, including meeting a 1.20 historical and projected debt service coverage ratio.

As of 31 March 2026, SRV Joint Gas Ltd and SRV Joint Gas Two Ltd met both the historical and the projected debt service coverage ratio.

Condensed statement of comprehensive income for the joint ventures gross:

USD '000	<b>Three Months Ended 31 March</b>	
	<b>2026</b>	<b>2025</b>
Time charter revenues	22,570	22,335
Other Income, net	263	1,131
<b>Total Income</b>	<b>22,833</b>	<b>23,466</b>
Vessel operating expenses	(4,258)	(4,410)
Administrative expenses	(482)	(472)
<b>Operating profit before depreciation and amortisation (EBITDA)</b>	<b>18,093</b>	<b>18,584</b>
Depreciation and amortisation	(6,011)	(6,009)
<b>Operating profit</b>	<b>12,082</b>	<b>12,575</b>
Interest income	334	443
Interest expenses	(1,814)	(2,551)
Income from other financial items	(33)	(31)
Expenses from other financial items	(1,420)	(1,643)
<b>Total financial income (expense), net</b>	<b>(2,933)</b>	<b>(3,782)</b>
<b>Ordinary profit (loss) before tax</b>	<b>9,149</b>	<b>8,793</b>
Income tax expense	—	—
<b>Ordinary profit (loss) for the period after tax</b>	<b>9,149</b>	<b>8,793</b>
Share of joint ventures owned	50%	50%
Share of joint ventures net income (loss) before eliminations	4,575	4,397
Eliminations	81	(148)
<b>Equity in earnings (losses) of joint ventures</b>	<b>4,656</b>	<b>4,249</b>

## 5. Related party transactions

### Income (expenses) from related parties

As described in disclosure note 4.1 in the Annual Financial Statements 2025, subsidiaries of Höegh Evi have provided administrative services to the Partnership and ship management and/or technical support services for the *PGN FSRU Lampung*, the *Höegh Gallant* and the *Höegh Grace* as well as leasing the *Höegh Gallant*.

Related party transactions included in the consolidated statements of income for the three months ended 31 March 2026 and 2025:

USD '000	Three months ended 31 March	
	2026	2025
<i>Revenues</i>		
Time charter revenue <i>Höegh Gallant</i> (1)	—	3,965
<i>Operating expenses</i>		
Vessel operating expenses (2)	(1,627)	(1,382)
Hours, travel expense and overhead (3) and Board of Directors' fees (4)	(327)	(310)
<i>Financial (income) expense</i>		
Interest income from joint ventures (5)	—	105
Interest expense to Höegh Evi (6)	(2,608)	(3,673)
<b>Total</b>	<b>(4,562)</b>	<b>(1,295)</b>

- 1) Time charter revenue *Höegh Gallant*: From September 2021 until July 2025 the Partnership was compensated from subsidiary of Höegh Evi for the difference between the charter rate earned from the New Fortress Energy charter (later Excelerate Energy) and the lease agreement initially held with subsidiaries of Höegh Evi (Suspended Gallant Charter). The compensation ended on 31 July 2025, the original expiration date of the Suspended Gallant Charter.
- 2) Vessel operating expenses: Subsidiaries of Höegh Evi provide ship management of vessels, including crews and the provision of all other services and supplies.
- 3) Hours, travel expenses and overhead: Subsidiaries of Höegh Evi provide management, accounting, bookkeeping and administrative support under administrative service agreements.
- 4) Board of Directors' fees: Board of Directors' fees were USD 56 thousand for the three months ended 31 March 2026 and 2025, respectively. The CEO/CFO is employed by Höegh Evi and does not receive any separate compensation from the Partnership.

- 5) Interest income from joint ventures: The Partnership and its joint venture partners have provided subordinated financing to the joint ventures as shareholder loans. Interest income for the Partnership's shareholder loans to the joint ventures is recorded as interest income.
- 6) Interest expense to Höegh Evi and affiliates: Höegh Evi Infrastructure Ltd. ("Evi Infrastructure") a fully owned subsidiary of Höegh Evi, has provided a USD 250 million intercompany debt facility for general Partnership purposes. Please refer to Note 7 for further disclosure. The Partnership incurred interest expense of USD 2.6 million and USD 3.6 million on the drawn balance for the three months ended 31 March 2026 and 31 March 2025, respectively.

Dividends to Höegh Evi: The Partnership has declared and paid quarterly distributions totaling USD 12 million and USD 73.5 million to Höegh Evi for the three months ended 31 March 2026, and the year ended 31 December 2025, respectively.

## 6. Income tax

The Partnership is not subject to Marshall Islands corporate income taxes. Income tax expense is incurred from its subsidiaries globally and are recognised based on estimated amounts recoverable from or payable to tax authorities for the reporting period.

Deferred tax assets and liabilities are recognised for temporary differences between the tax bases of assets and liabilities and their carrying amounts for financial reporting purposes as of the reporting period.

### 6.1 The components of corporate income- and deferred taxes

USD '000	Three months ended 31 March	
	2026	2025
Current tax (benefit) expense	1,802	1,707
Deferred tax (benefit) expense	603	90
<b>Total income tax expense</b>	<b>2,405</b>	<b>1,797</b>

Income tax expense for the three months ended 31 March 2026 was USD 2.4 million, an increase of USD 0.6 million compared to USD 1.8 million for the three months ended 31 March 2025. The increase is due to a deferred tax asset movement in Colombia for the three months ended 31 March 2025 related to deferred revenue element not recognized in current payable taxes.

## 6.2 Tax uncertainty

The Partnership's subsidiaries are subject to tax audits and assessments in the jurisdictions in which they operate. The outcomes of such tax audits and pending appeals are uncertain and may have implications for other tax years which are still open for tax audits in the relevant jurisdictions.

Reference is made to the Annual Financial Statements for 2025, disclosure note 5.5 – *uncertain tax positions* for additional information.

There has been no material change to the uncertain tax position during the three months period ended 31 March 2026.

As of 31 March 2026, and 31 December 2025, the Partnership had a net provision for uncertain potential tax liabilities of USD 4.3 million and USD 4.6 million respectively.

## 7. Interest bearing debt

### Interest-bearing debt as of 31 March 2026

USD 250 million debt facility – Höegh Evi Infrastructure: The Partnership has entered into an intercompany loan agreement (the "USD 250 million debt facility") with Höegh Evi Infrastructure Ltd. ("Evi Infrastructure") a fully owned subsidiary of Höegh Evi. The USD 250 million debt facility has a fixed interest of 6% p.a. amortizes with quarterly installments of USD 8.9 million and has a final maturity date on 30 October 2030.

The outstanding amounts related to the USD 250 million debt facility, including accrued interest, as of 31 March 2026 and 31 December 2025 are as follows:

USD '000	31 Mar 2026	31 Dec 2025
USD 250 million facility	172,066	181,144
<b>Less: Current portion of debt facility</b>	<b>(37,423)</b>	<b>(37,573)</b>
<b>Non-current portion of debt facility</b>	<b>134,643</b>	<b>143,571</b>

The USD 250 million debt facility is linked to an external debt facility entered by Evi Infrastructure with external lenders (the "Evi Infrastructure External Loan"). The Partnership and certain of its subsidiaries are collectively corporate guarantors together with Evi Infrastructure for the Evi Infrastructure External Loan. The Evi Infrastructure External Loan contains certain financial covenants, which were all fulfilled as of 31 March 2026.

## Interest-bearing debt in joint ventures as of 31 March 2026

	<b>SRVJ (Neptune)</b>	<b>SRVT (Cape Ann)</b>
Drawdown date	29.11.2021	01.06.2022
Original amount drawn (USD'000)	154,000	154,000
Type of financing	Commercial banks	Commercial banks
Blended tenor on the debt (years)	8	8
Blended profile on the debt (years)	8	8
Blended fixed all-in-rate	7.43%	7.42%
USD '000	<b>31 Mar 2026</b>	<b>31 Dec 2025</b>
Interest-bearing debt, SRVJ (Neptune)	(82,658)	(87,164)
Interest-bearing debt, SRVT (Cape Ann)	(91,734)	(96,363)

## 8. Financial instruments – interest rate hedging

Since the USD 250 million debt facility has a fixed interest of 6% p.a, the Partnership's exposure to interest rate risk is primarily related to the interest-bearing debt in the joint ventures. The joint ventures manage exposure to interest rate risk using interest rate swaps, which cover about 100% of the interest exposure for the tenor of the debt. As of 31 March 2026, the Partnership's pro rata share of net mark-to-market valuation of interest rate swaps entered into by joint ventures was negative net USD 6.8 million (negative net USD 5.9 million on 31 December 2025). The joint ventures have elected to apply hedge accounting which is governed under the accounting standard IFRS 9 – Financial Instruments, for its hedging of interest rate risk.

## 9. Commitments and contingencies

### Contractual commitments

The Partnership may be subject to contractual commitments and contingencies arising in the normal course of business, such as vessel upgrades and maintenance.

As of 31 March 2026, there were no material contractual purchase commitments.

### Claims and Contingencies

Except for the tax uncertainties disclosed in Note 6, there were no material claims and contingencies as of 31 March 2026. Please refer to the Annual Financial Statements 2025 for detailed information.

## 10. Common and preferred units

The Partnership has issued common and preferred units.

There have been no movements in the number of common units and preferred units from 31 December 2025 until 31 March 2026 as shown below:

(in units)	<b>Common Units Höegh EVI</b>	<b>8.75% Series A Preferred Units</b>
<b>December 31, 2025</b>	<b>33,373,002</b>	<b>5,693,345</b>
<b>March 31, 2026</b>	<b>33,373,002</b>	<b>5,693,345</b>

All common units are owned by Höegh Evi Ltd.

The Series A preferred units represent perpetual equity interests in the Partnership and, unlike the Partnership's debt, do not give rise to a claim for payment of a principal amount at a particular date. The Series A preferred units rank senior to the Partnership's common units as to the payment of distributions and amounts payable upon liquidation, dissolution or winding up but junior to all the Partnership's debt and other liabilities. The Series A preferred units have a liquidation preference of USD 25.00 per unit. The distribution rate on the Series A preferred units is 8.75% per annum of the USD 25.00 per unit value (equivalent to USD 2.1875 per annum per unit). The distributions are cumulative and recorded when declared.

## 11. Subsequent events

On 9 April 2026, the Partnership declared a distribution of USD 3.1 million, or USD 0.546875 per Series A preferred unit, for the period commencing on 17 February to 15 May 2026. The distribution was paid on 15 May 2026.

On 9 April 2026, the Partnership declared a distribution of USD 11.0 million, or USD 0.33 per common unit for the period covering the three months ending 31 March 2026.

## Forward-looking statements

This interim financial statement contains forward-looking statements. These forward-looking statements are based on various assumptions, many of which are based in turn on further assumptions, including examination of historical operating trends made by the Partnership. Although the Partnership believes that these assumptions were reasonable when made, the Partnership cannot give assurance that it will achieve or accomplish these expectations, beliefs or intentions because such assumptions are inherently subject to significant uncertainties and contingencies which are difficult or impossible to predict and are beyond its control.

Important factors which could cause actual results to differ materially from those in the forward-looking statements inter alia include (but are not limited to): changes in LNG transport, regasification and floating liquefaction market trends; changes in supply and demand for LNG; changes in trading patterns; changes in applicable maintenance and regulatory standards; political events affecting production and consumption of LNG as well as the Partnership's ability to operate and control its vessels; risk that incidents occur in relation to the Partnership's assets or activities and that insurance may be insufficient to cover resulting losses; risk that the Partnership's operations, its customers or suppliers could breach applicable sanctions or anti-bribery/anti-corruption regulations which may cause reputational harm or financial losses; changes in the financial stability of clients or the Partnership's ability to win upcoming tenders and to secure new employment for its assets; changes in the Partnership's ability to complete and deliver projects awarded; increases in the Partnership's cost base; failure by suppliers and yards to comply with delivery schedules; changes in vessels' useful lives; changes in the ability of the Partnership to obtain additional financing; changes in applicable regulations and laws. Unpredictable or unknown factors herein could also have material adverse effects on forward-looking statements.



**HÖEGH LNG PARTNERS LP**