

Natural Gas Supply & Demand Prospect and a Vision of Natural Gas Infrastructure in NEA

北東アジアの天然ガス需給見通しと
天然ガスインフラストラクチャー構想

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1. What's NAGPF?

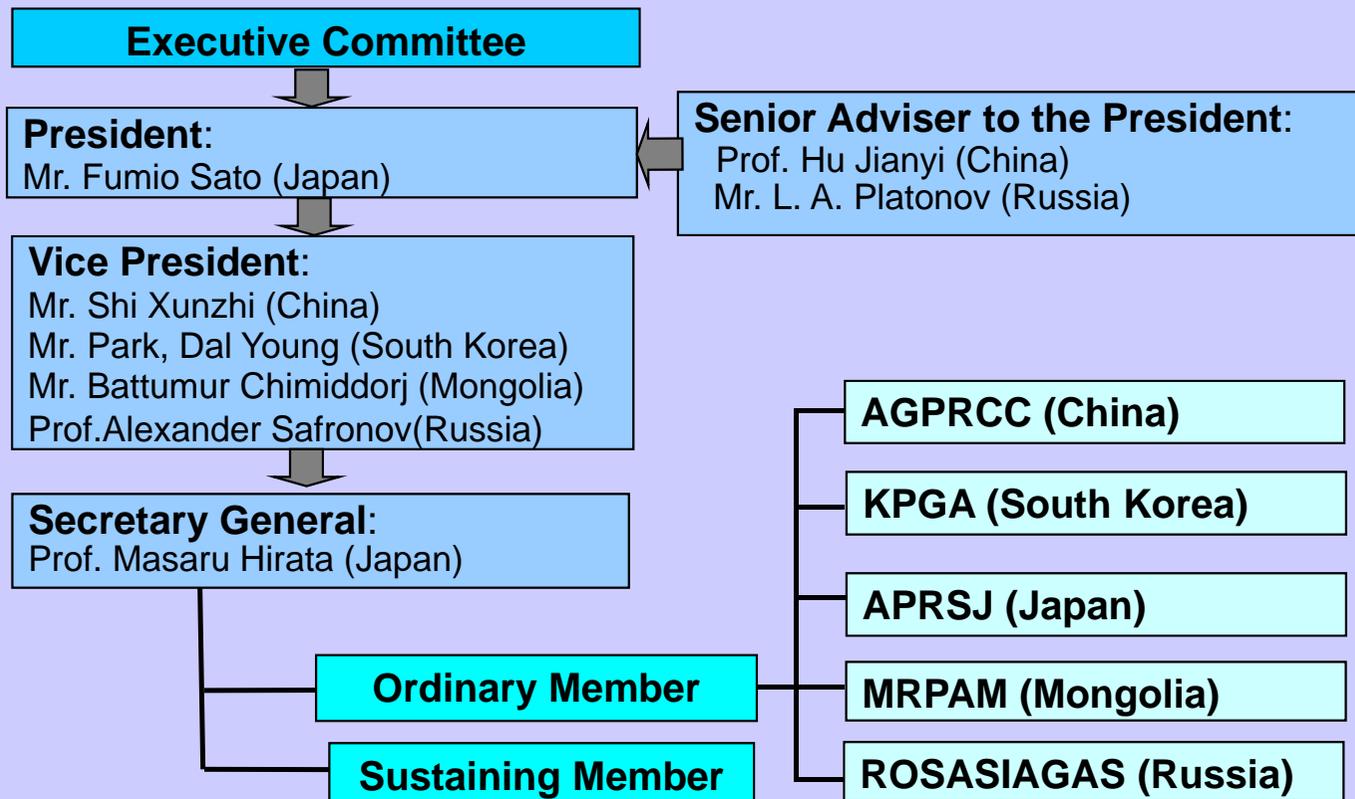
(Northeast Asian Gas & Pipeline Forum)

- **Established in 1997**
- **To promote multilateral cooperation in order to realize the enhancement of natural gas development and utilization in NEA**
- **5 ordinary member organizations**
 - **Russia**
 - **Mongolia**
 - **China**
 - **South Korea**
 - **Japan**



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Organization



Northeast Asian Gas & Pipeline Forum

Three Major Achievements of the past decade

(1) To build the platform

- **To focus on natural gas in Northeast Asia**
- **Member organizations from 5 countries, international organizations, governments, industries and academic standings**
- **To build a good relationship among related experts and business persons in NEA**



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(2) To hold International Conferences

- 10 times**
- Flagship activities**
- Input from about 300 persons in total**
- About 2000 participants in total**
- To hold conferences in 5 countries in
Northeast Asia**



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The 10th International Conference on Northeast Asian Natural Gas Pipeline (PNG2007) in Novosibirsk



About 150 representatives from business and scientific circles and public organizations participate in the Conference.



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(3) To conduct International Joint Researches

- **To carry out joint researches 4 times**
- **To make the long-term vision of natural gas infrastructure in NEA as the flagship publication of the NAGPF**
- **To collect and organize the latest information on natural gas policy, natural gas supply and demand prospect, development of infrastructure etc.**



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2. Long-Term Vision of Natural Gas Infrastructure

- (1) Natural Gas Supply and Demand Balance
in NEA**
- (2) Long-term Vision of Natural Gas
Infrastructure in NEA**



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(1) Natural Gas Supply and Demand Balance in NEA

Natural Gas Production & Export Capacity in 2020

Country	Region	Production (BCM)	Export (BCM)
Russia	East Siberia	55	-
	Far East	95	-
	East Siberia+Far East	150	71
China	Northeast	5-10	
	Bohai Rim	3-5	
	Yangtze River Delta	-	
	Central & South	-	
	Central	-	
	Northwest	57-65	
	Southwest	27-35	
	Southeast Coastal	20-25	
	Coal bed methane	8-10	
	Total	120-150	



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Natural Gas Demand in 2020

(BCM)

		2000	2010	2020
China	Northeast	-	15.88	28.93
	Bohai Rim	-	19.50	40.19
	Yangtze River Delta	-	15.03	36.40
	Central & South	-	10.53	25.44
	Central	-	5.57	9.75
	Northeast	-	8.90	16.36
	Southwest	-	12.23	19.81
	Southeast Coastal	-	19.15	33.84
	Total	36.0	106.81	210.71
South Korea		19.3	32.8	49.0
Japan		73.0	84.1	81.7 – 91.6
Mongolia		-	-	0.4 – 0.6
Russia	East Siberia	4.2	9.1	16.2
	Far East	3.8	7.8	18.1
	East Siberia + Far East	8.0	16.9	34.3
Total		136.3	240.61	376.11 - 386.21



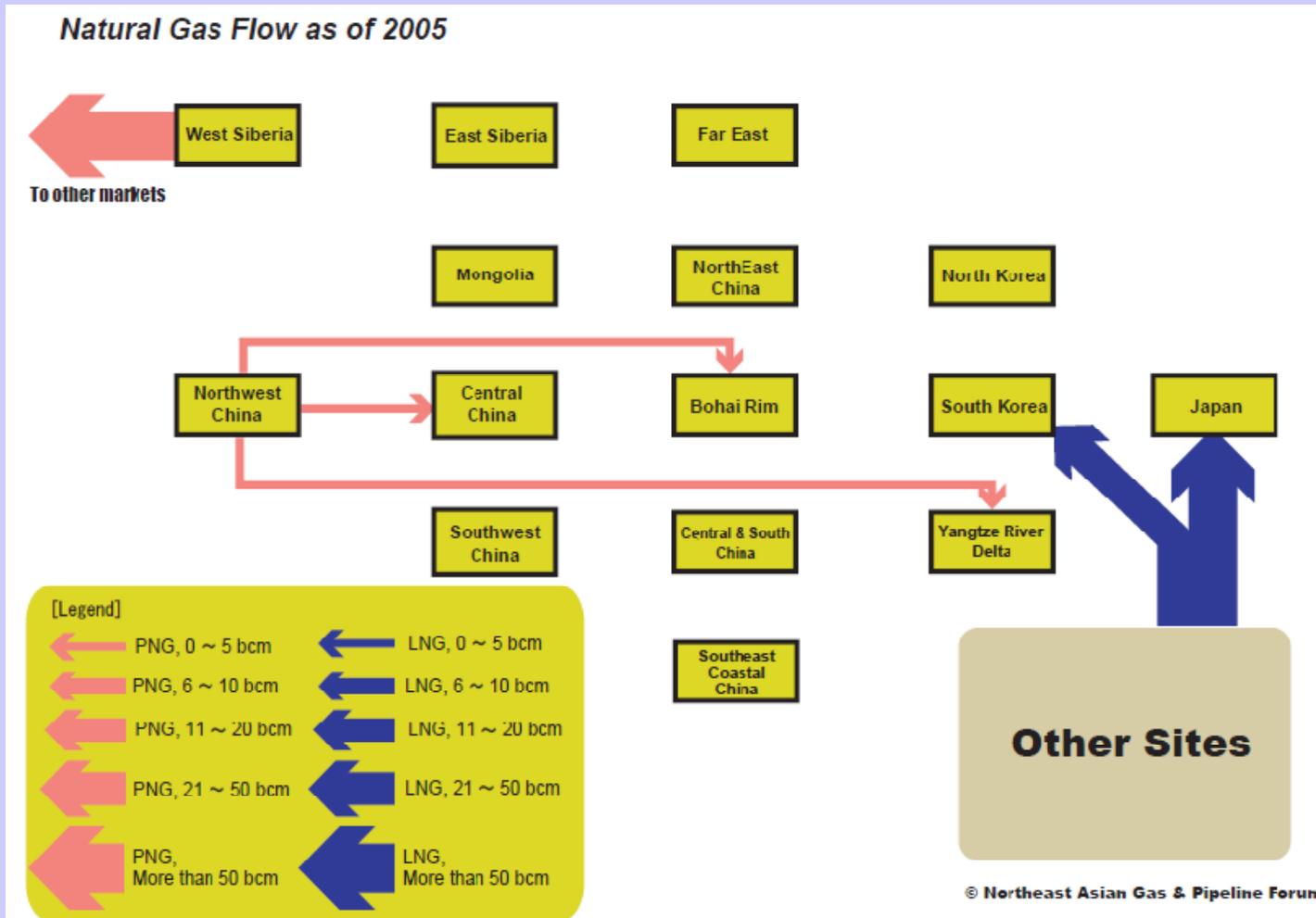
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Supply and Demand Balance

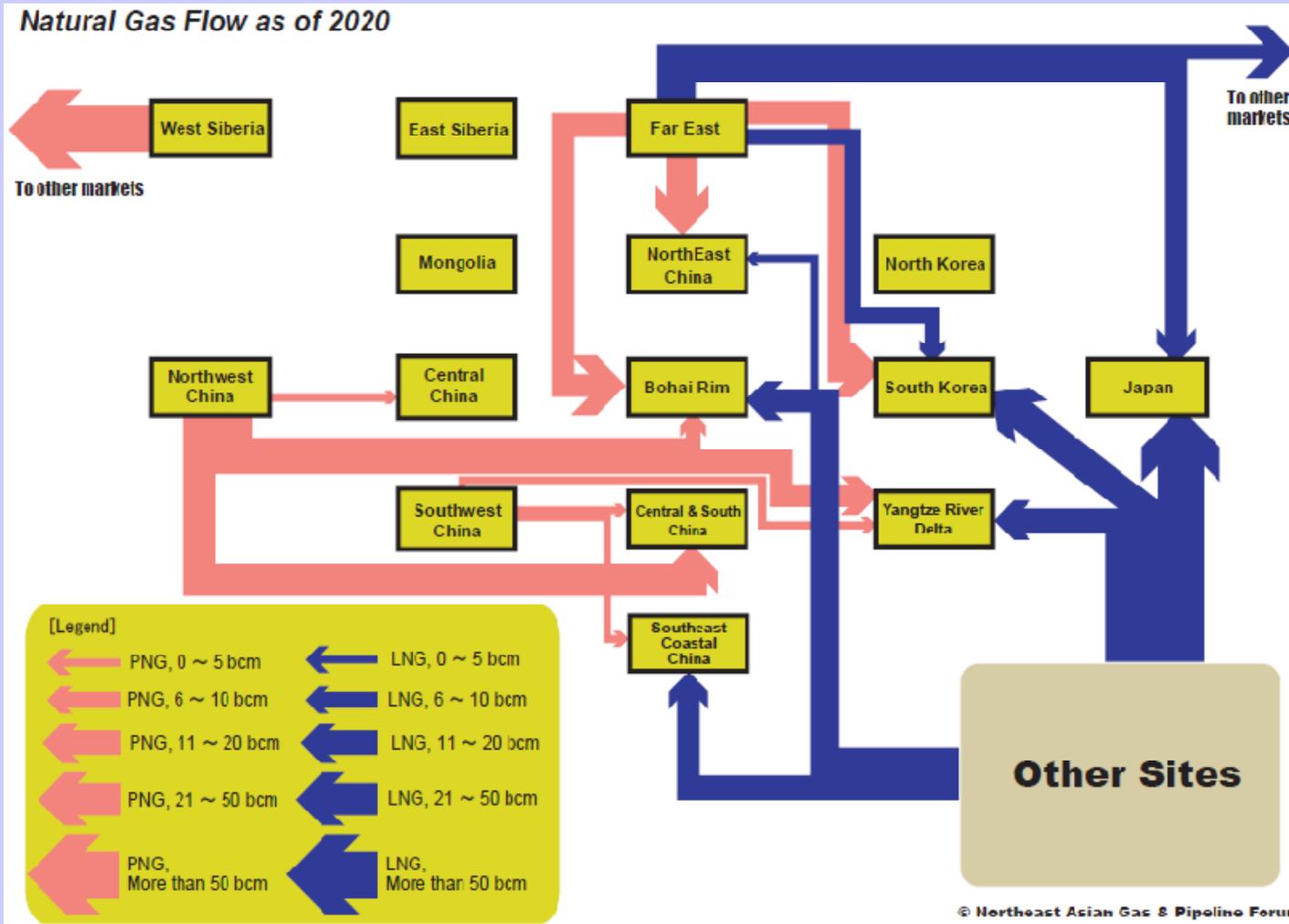
- ◆ **Potential Export volume from East Siberia and the Far East (70BCM) could cover around 20% of the gas demand of rest of the four countries in 2020**
- ◆ **East Siberia and the Far East will become one of the most important sources for NEA**
- ◆ **The rest demand would be covered by LNG and domestic natural gas production**



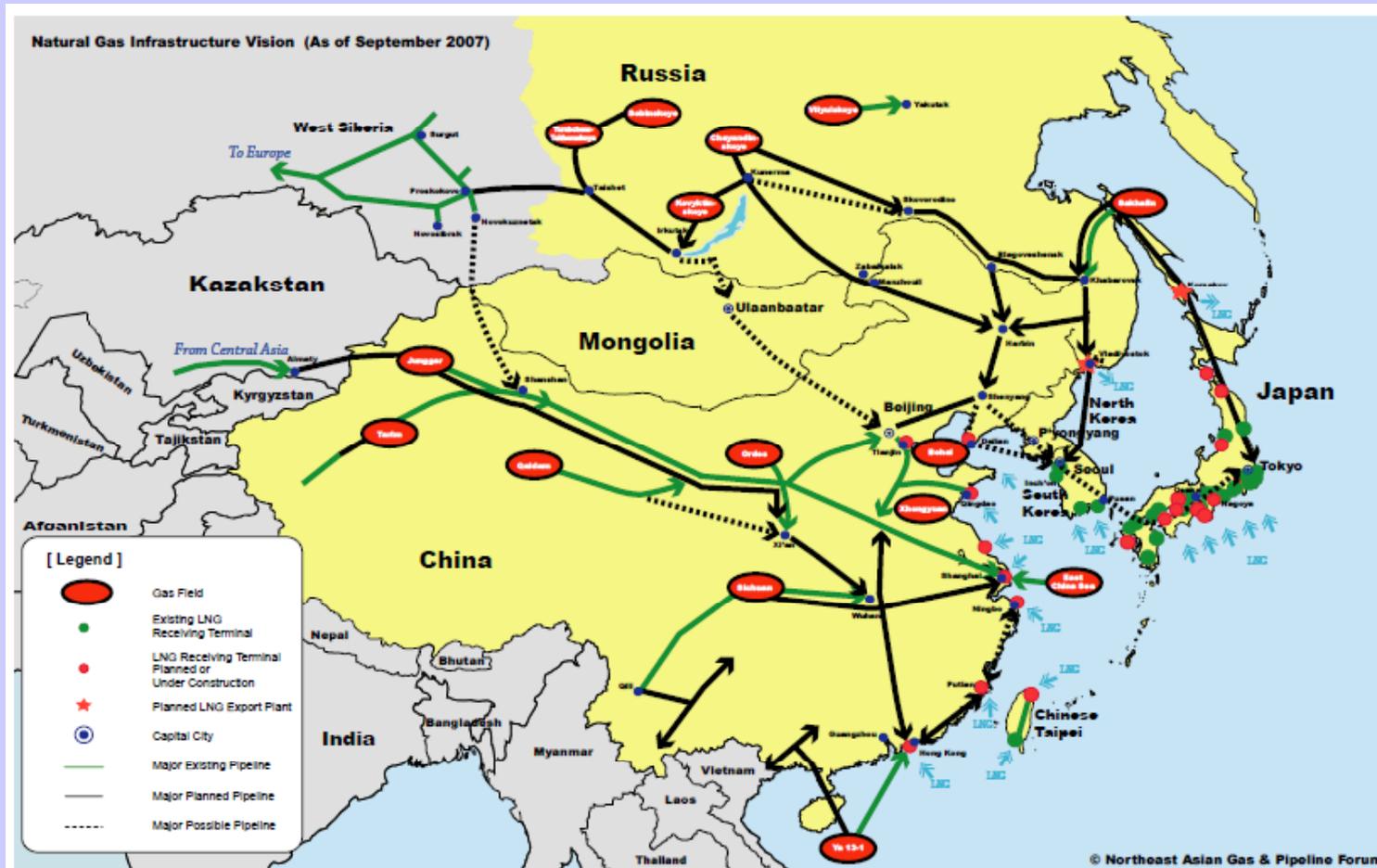
Natural Gas Flow as of 2005



Natural Gas Flow as of 2020



(2) Long-term Vision of Natural Gas Infrastructure in NEA



Natural Gas Infrastructure Vision

The 11th International Conference on Northeast Asian Natural Gas & Pipeline in Tokyo “NAGPF 2009”

- *Date: October 27-28, 2009*
- *Venue: Tsunamachi Mitsui Club, Tokyo (tentative)*



Thank You!



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