

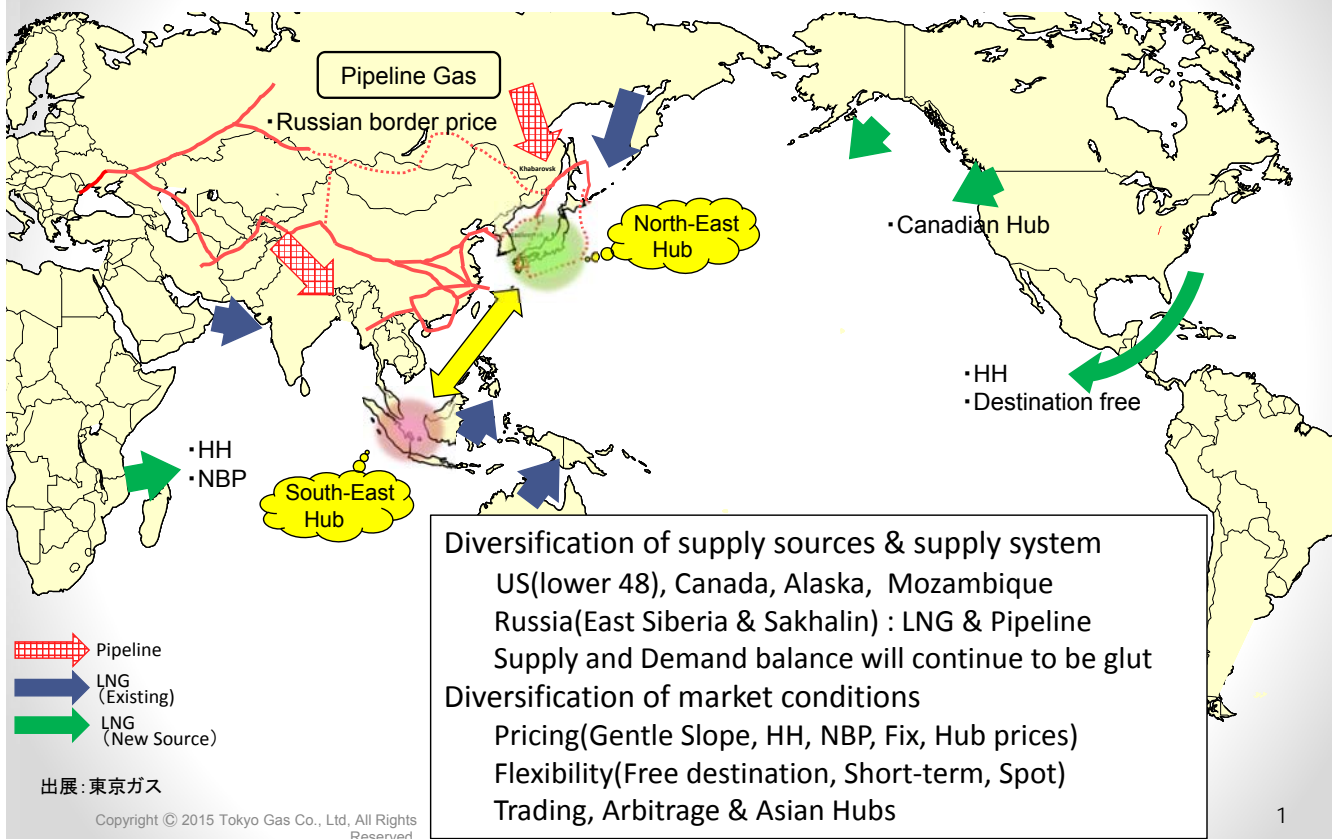
Diversification of Natural Gas Market in Japan

Natural Gas Infrastructure Development & Utilization Committee

JAPIC

N. Aoyama

Diversifications of Gas Market(Supply side)



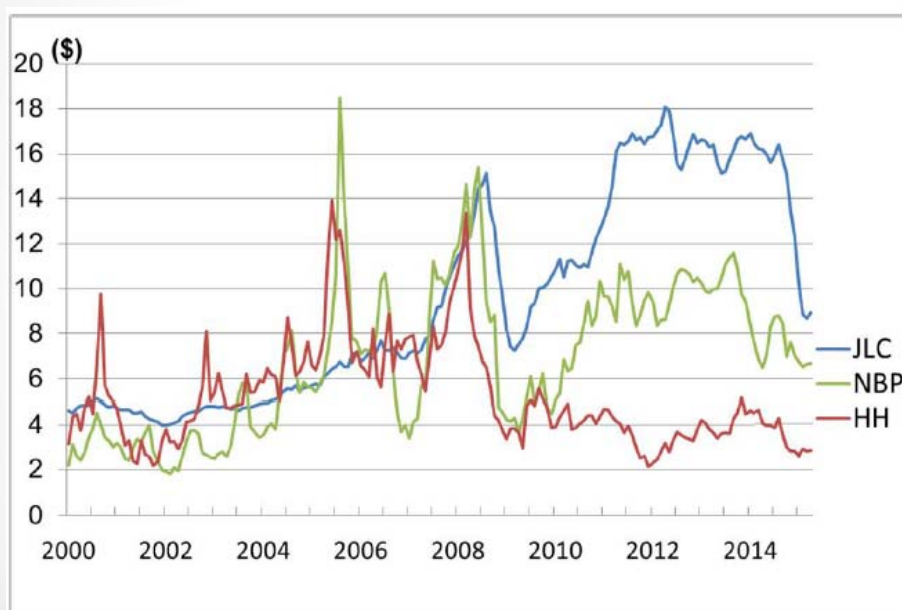
LNG demand in Japan

Ratio of Each Energy Source in Primary Energy Supply

	1970	2010	2012	2030
Fossil Fuel	92%	82%	92%	76%
Others	8%	18%	8%	24%
	1970	2010	2012	2030
Oil	70%	40%	44%	33%
Coal	21%	23%	23%	25%
Natural Gas	1%	19%	25%	18%
	1970	2010	2012	2030
LNG	1 M ton	71 M ton	90 M ton	62 M ton ???

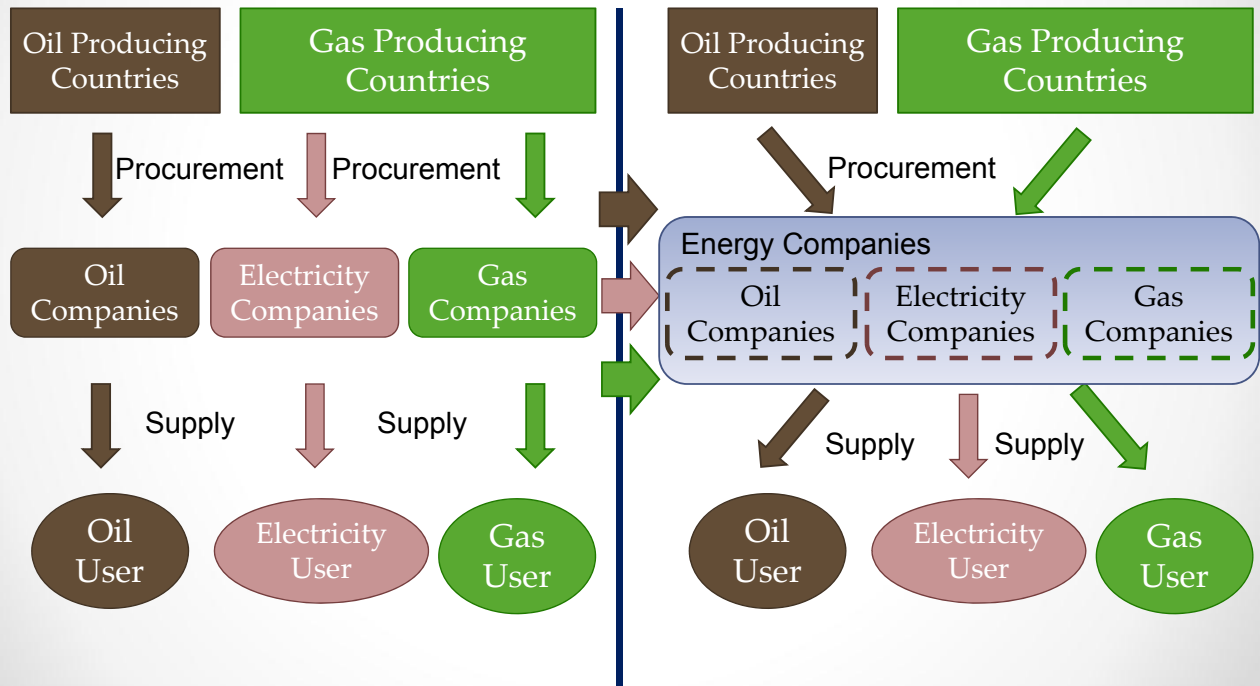
出展: LNG産消会議

Gas and LNG Price



出展: LNG産消会議

Deregulation in Energy Sector 【 Competition among Utilities 】



● 出展: LNG産消会議 ●

Key for Japanese Gas Market

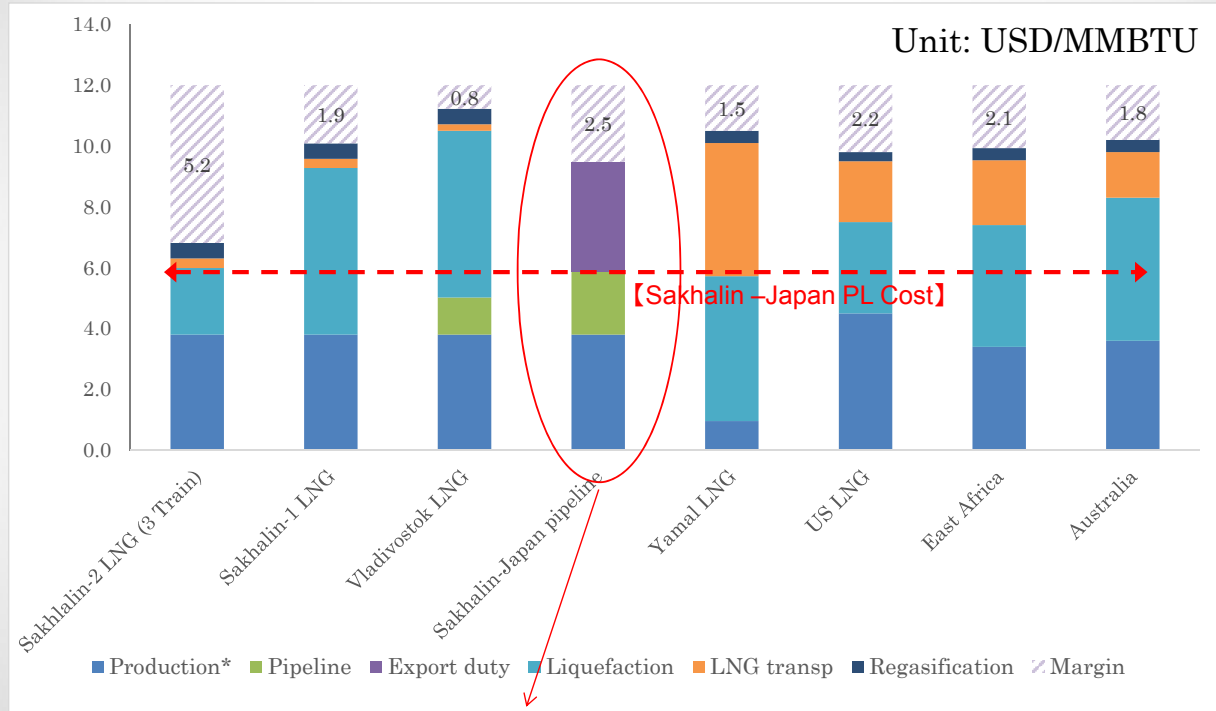
Cost Competitiveness & Sustainable Supply
is the Key to Natural Gas market in Japan

【Trend】

- Diversification of supply sources
 - New LNG suppliers
USLNG(lower 48), East Africa, Alaska, Canada etc.
 - [Pipeline from Russia\(*1\)](#)
- Infrastructure Development
 - National Pipeline net work(*2)
- High efficient Use of Natural Gas
 - CHPs, Fuel Cells, Smart Energy Network

⇒ Increase of Natural gas Use

(*1) Comparison of LNG vs. Pipeline



Sakhalin-Japan Pipeline is the most economical case.

* Export Duty is regarded as revenue for Russian Gov.

出展: 日本エネルギー経済研究所

Natural Gas Pipeline from Russia to Japan

