



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

November, 2008

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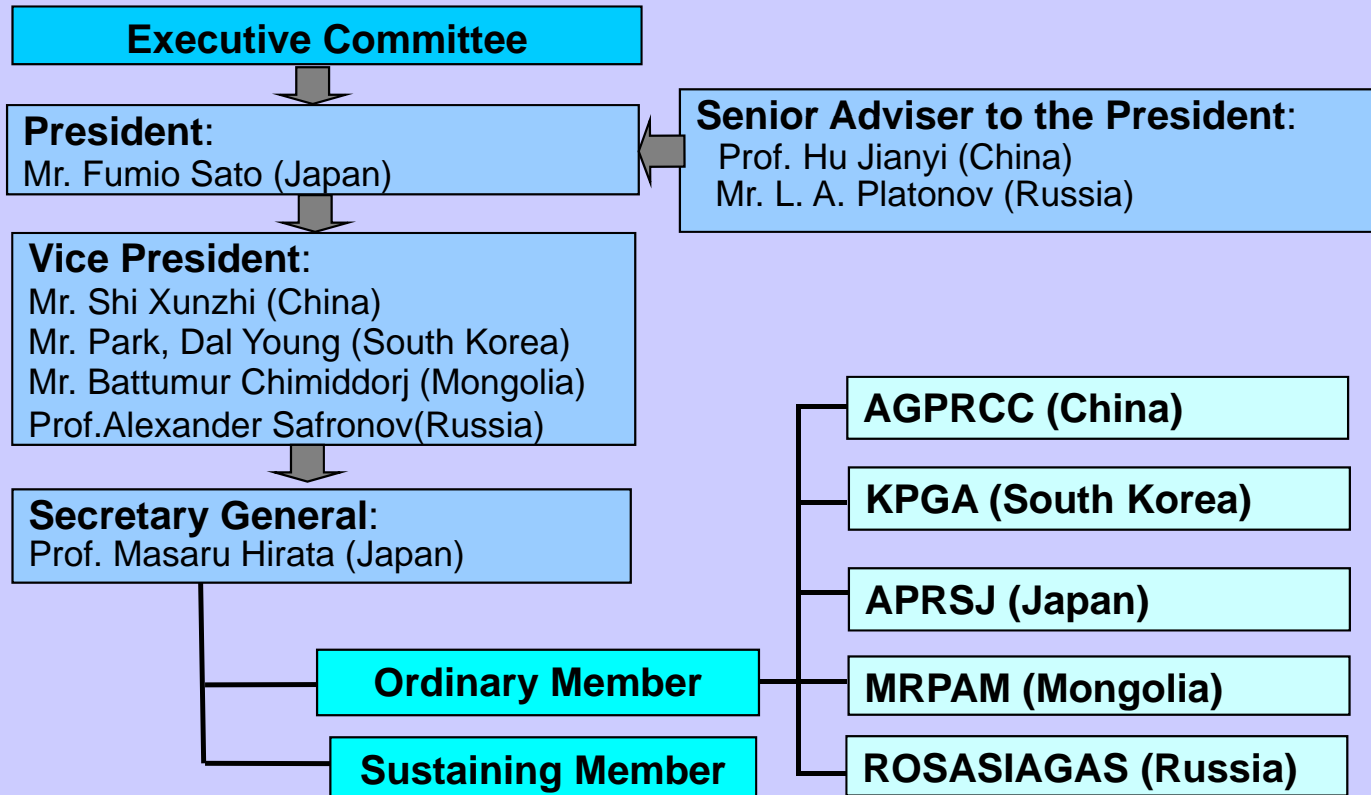
1. What's NAGPF?

(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**



Organization



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**



(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**



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.



Northeast Asian Gas & Pipeline Forum

(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.**



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**



(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	



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

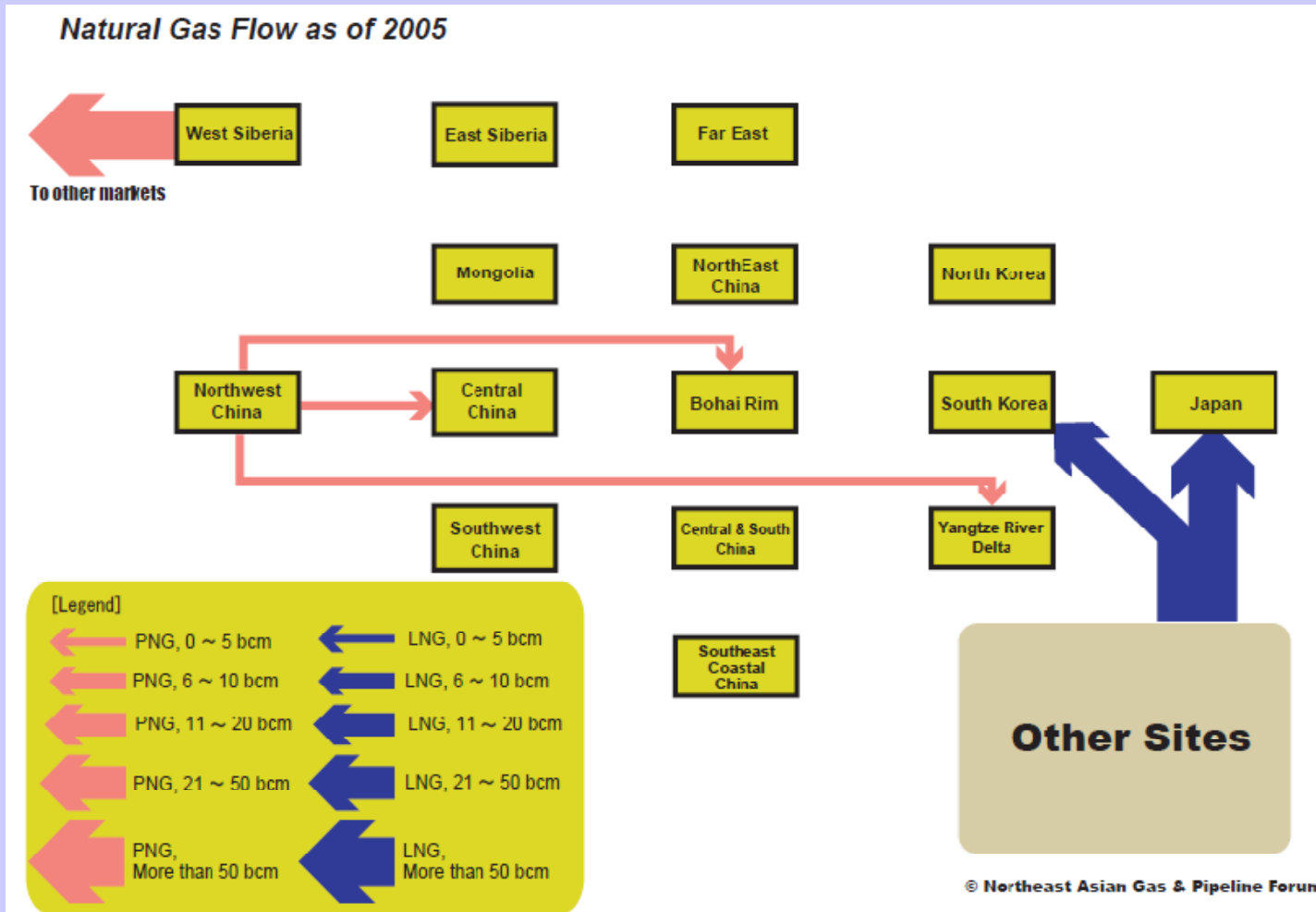


Supply and Demand Balance

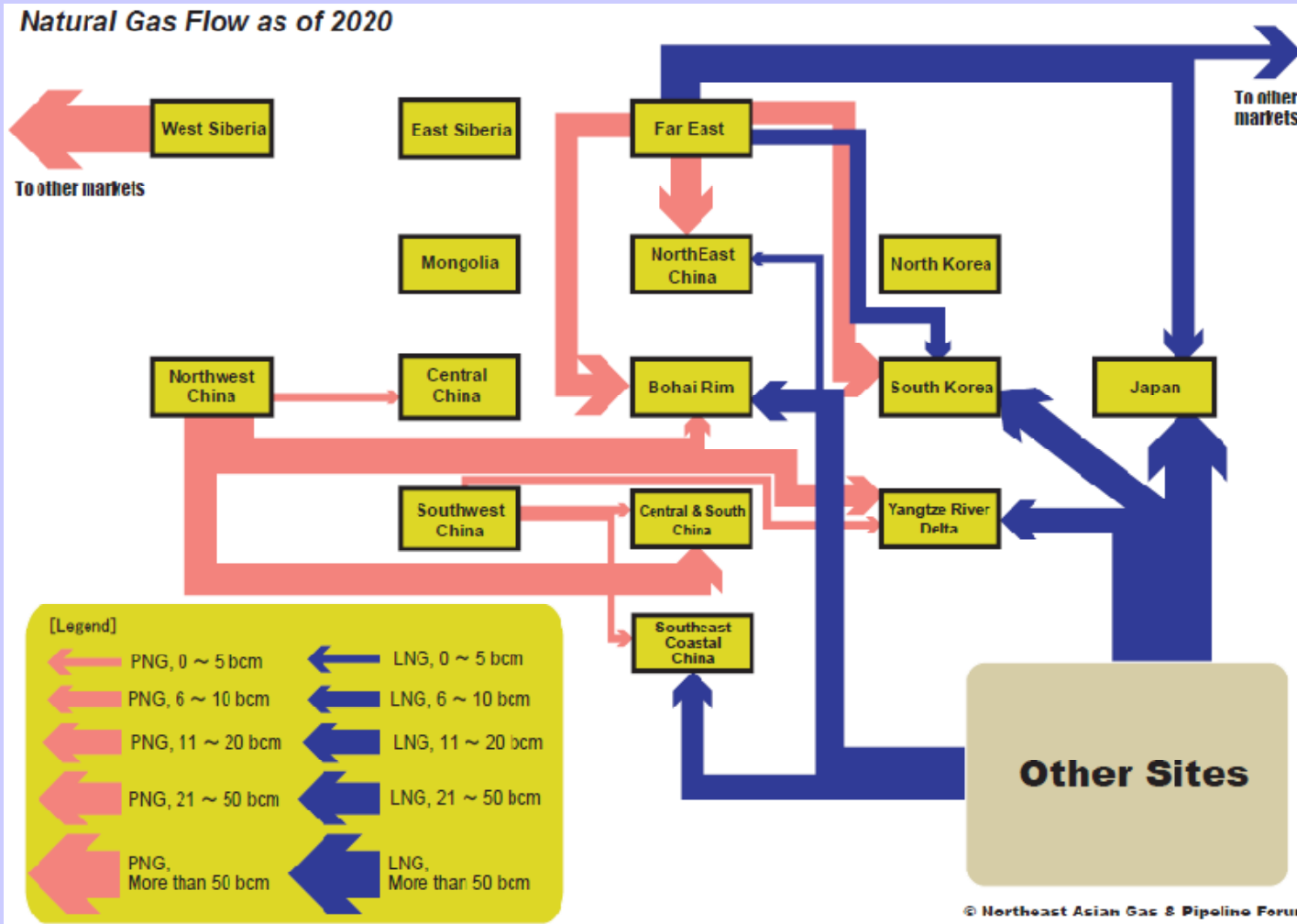
- ◆ **Potential Export volume from East Siberia and the Far East (70BCM) could cover around 20% of the gas demand of rest of the four countries in 2020**
- ◆ **East Siberia and the Far East will become one of the most important sources for NEA**
- ◆ **The rest demand would be covered by LNG and domestic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



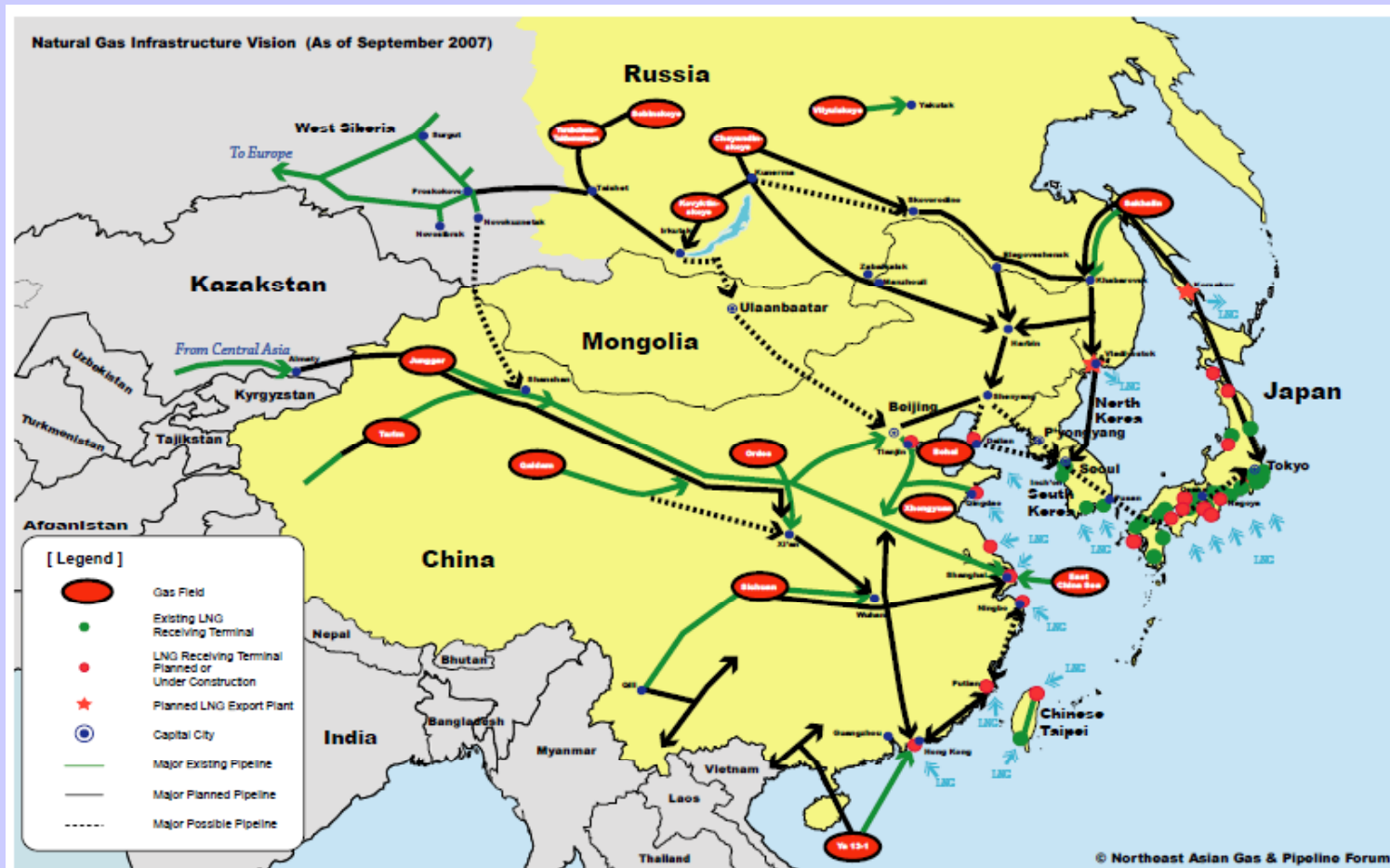
Natural Gas Flow as of 2005



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!



Northeast Asian Gas & Pipeline Forum