

Japan Oil and Gas Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We have revised our forecasts taking into account newly available sources of historical data from the Japanese Ministry of Economy, Trade and Industry. A government-led push for greater consolidation in the refining sector will see further cutbacks in Japan's refining capacity up to 2017, while growing fuel efficiency gains in the transport sector will gradually curb its crude oil and refined fuels consumption over the next 10 years. LNG imports will remain elevated in the short to medium term, though the return of nuclear generation will erode the share of gas-fired electricity generation in the power sector in the long term.

Latest Updates and Key Forecasts:

We have revised our forecasts taking into account newly available sources of historical data.

Challenges in the domestic refining sector continue to push Japanese refiners to pursue investment opportunities abroad. For example, refiners Idemitsu Kosan and Sumitomo Corporation are investing in oil and gas exploration campaigns offshore Vietnam; JX Nippon is also looking to invest in new refinery projects in Vietnam and Indonesia.

Kyushu Electric Power Company has restarted its Sendai nuclear station in Kagoshima on July 2015. This reiterates our belief that while LNG imports will remain elevated up to 2020, imports will decline thereafter as the gradual return of nuclear power generation erodes the share of gas-fired electricity generation in the country's power mix.

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