

Japan Oil and Gas Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We retain our bearish outlook towards Japan's long-term refined fuels and natural gas demand, which we forecast to fall by 7.1% and 3.5% over 2016-2025. This decrease will be a result of the gradual return of nuclear generation in the power sector, efficiency gains in the automotive and shipping sectors, as well as increasing emphasis on alternative energy sources such as renewables and biofuels.

Latest Updates And Key Forecasts:

Challenges in the domestic refining sector will continue to prompt refiners to consolidate operations and rationalise spare capacity. JX Holdings and TonenGeneral are expected to merge by April 2017, while Idemitsu Kosan and Showa Shell are set to follow likewise between October 2016 and April 2017.

Following the earlier restart of nuclear reactors by Kyushu Electric Power Company in July 2015, Kansai Electric Power Company received the green light to bring its reactors online at its Takahama and Oi nuclear plants in the Fukui prefecture.

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