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Abstracts

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BMI View: Slow economic growth, negative demographic trends and the growing prominence of nuclear and renewables energy will curtail Japan's long-term consumption of refined fuels and LNG. The aggressive government-led consolidation drive in the refining sector poses significant downside risk to our refining capacity forecasts, though improving run rates and more flexible production slates will allow Japan to see a small surplus in refined fuels from 2016.

Latest Updates And Key Forecasts

The government-led consolidation drive in the refining sector will see four of Japan's five largest refineries merge operations in the coming years. 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.

Japan's nuclear restarts continue to progress at a gradual rate, amid strong public opposition. In March 2016, the Otsu district order issued an injunction to halt operations at Kansai Electric's No.3 and No.4 nuclear reactors, while in April 2016, the Fukuoka court upheld a previous ruling to allow Kyushu Electric's Sendai No.1 and No.2 reactors to continue to operate.

LNG imports will continue its downslide over the next 10 years, as slower economic growth, negative demographic trends and rising prominence of alternative energy sources weigh on demand. We forecast net LNG imports to fall by 8.9% over 2016-2025.

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Slower domestic demand growth will be unmatched by improving run rates at existing refineries, which will allow Japan to become a small net exporter of refined fuels from this year. This will negatively affect the likes of South Korea, India, Malaysia and the Middle East, which are Japan's largest suppliers of refined fuels.

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