

Change in Japanese Energy Market

[Potential of Natural Gas]

- Limits of Nuclear Power & Renewables
- Natural Gas vs. Coal
 - Cost & CO2 Emissions
- Promotion of Natural Gas Utilization
 - Competitive and Sustainable supply
 - Development of National Pipeline Network
 - High efficient use of natural gas : CHPs, Fuel Cells, Smart Energy Network (Advanced distributed energy system)

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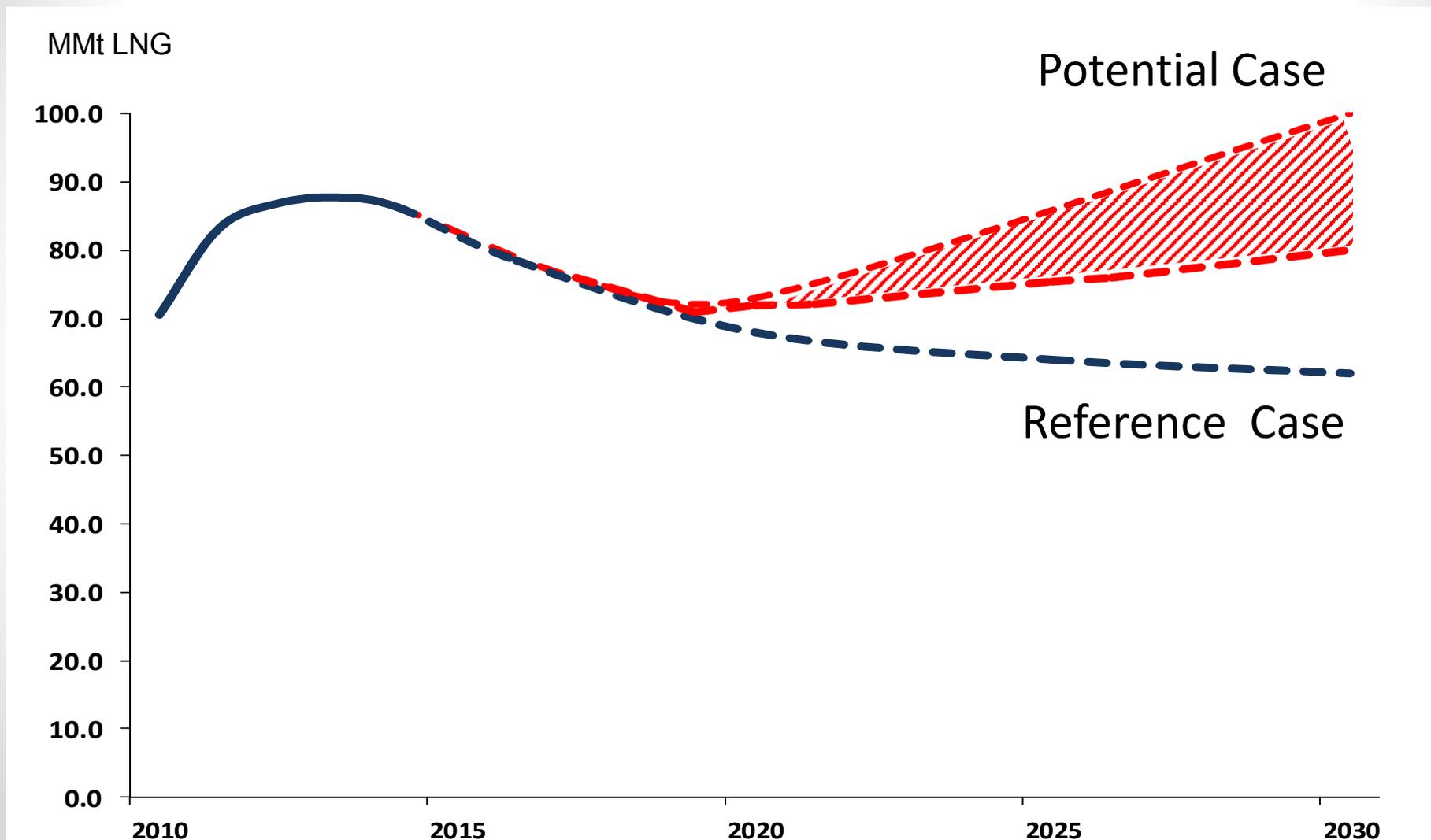
Potential Demand in 2030 : 100 ~ 130Bcm

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High Potential Supply

- Diversification of LNG supplies
 - New Supplies : USLNG, East Africa, Alaska, Canada
- Pipeline supply from Russia
- Methane Hydrate

Gas Demand Profile in Japan



Important Role of Russian Gas in North-East Asian Market

