



APEC ENERGY DEMAND & SUPPLY OUTLOOK

4th Edition

~ Case of Japan ~

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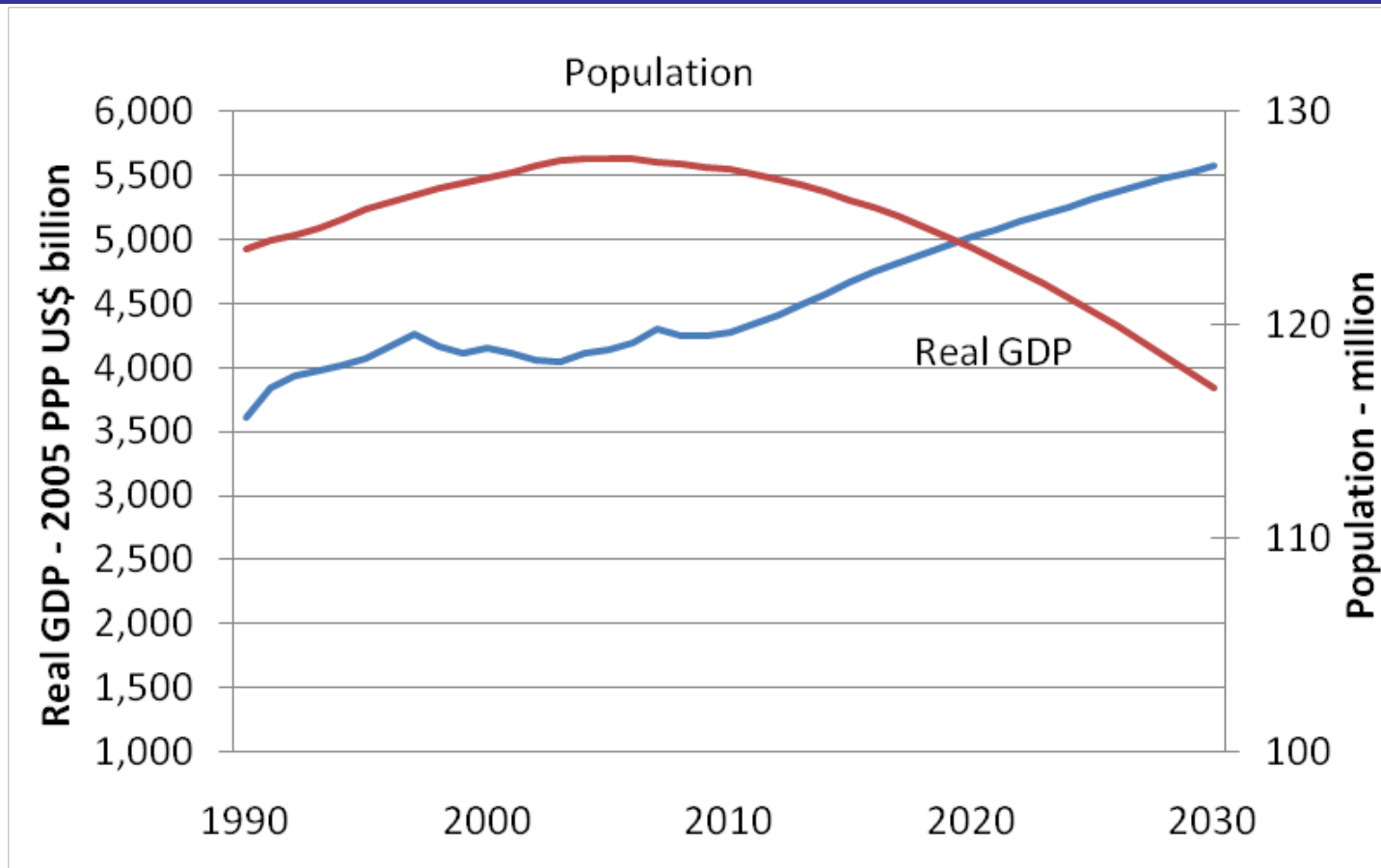


Asia-Pacific
Economic Cooperation

OUTLINE

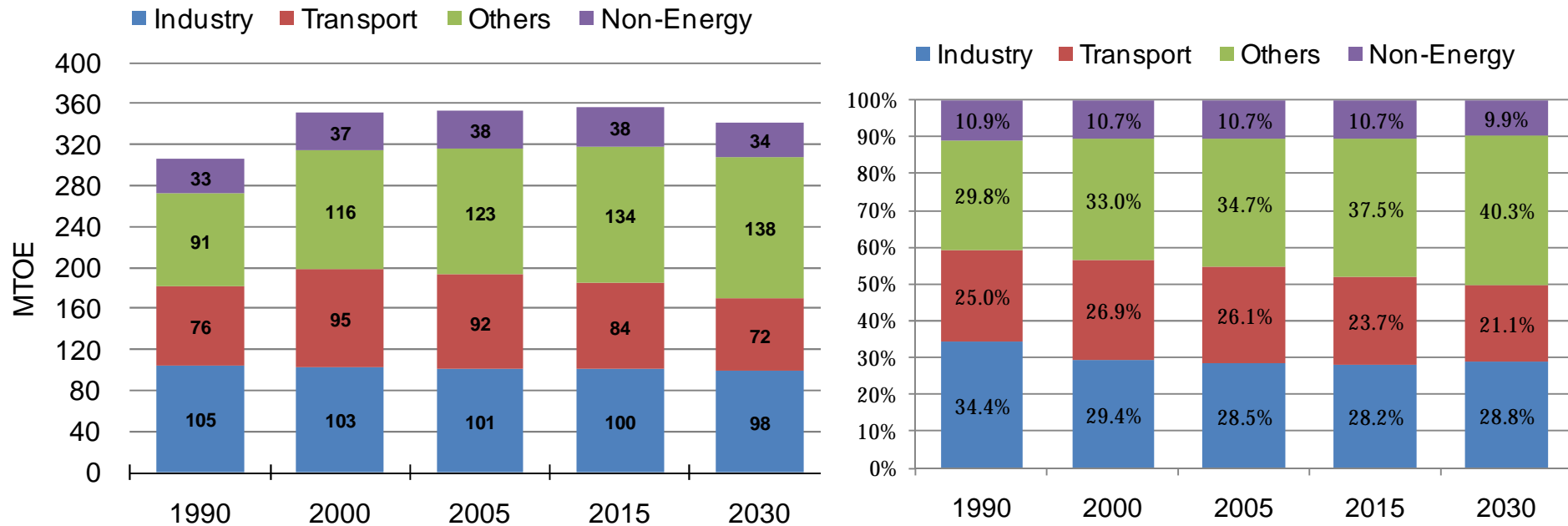
- **Economy and Assumptions**
- **Final Energy Demand**
- **Primary Energy Supply**
- **Electricity Generation Mix**
- **CO2 Emissions**
- **Challenges and Implications**

ECONOMY & ASSUMPTIONS



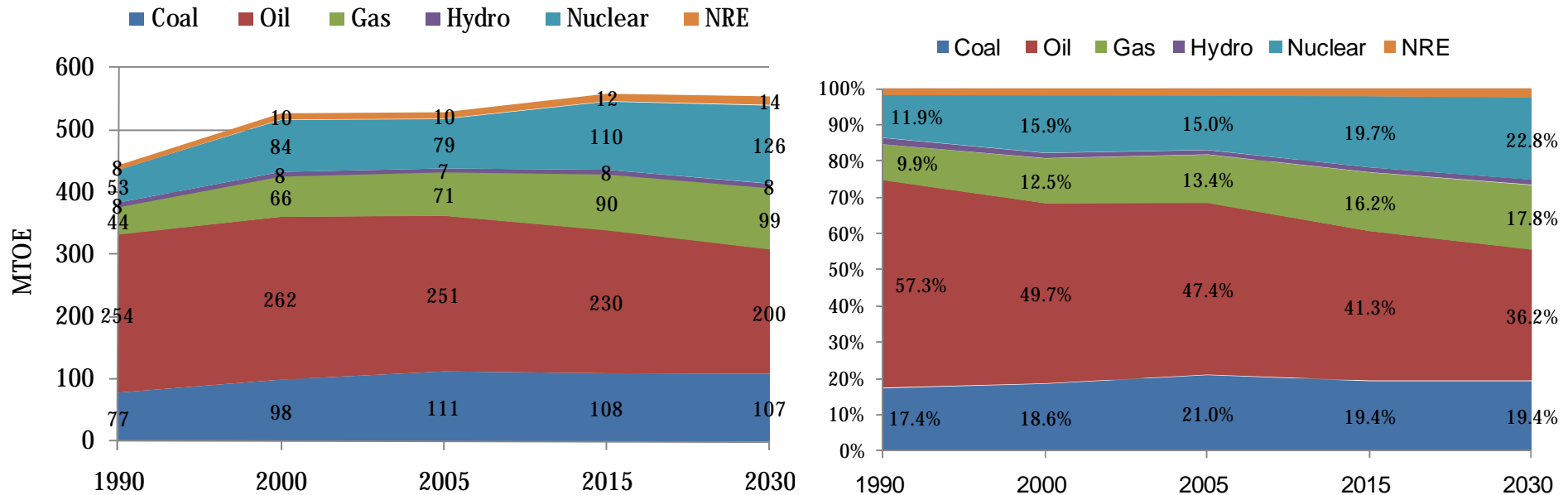
- Japan's GDP is expected to grow at an average annual rate of 1.2% between 2005 and 2030.
- Japan's population is expected to reduce over the outlook period, declining at an average rate of 0.4% between 2005 and 2030.

FINAL ENERGY DEMAND



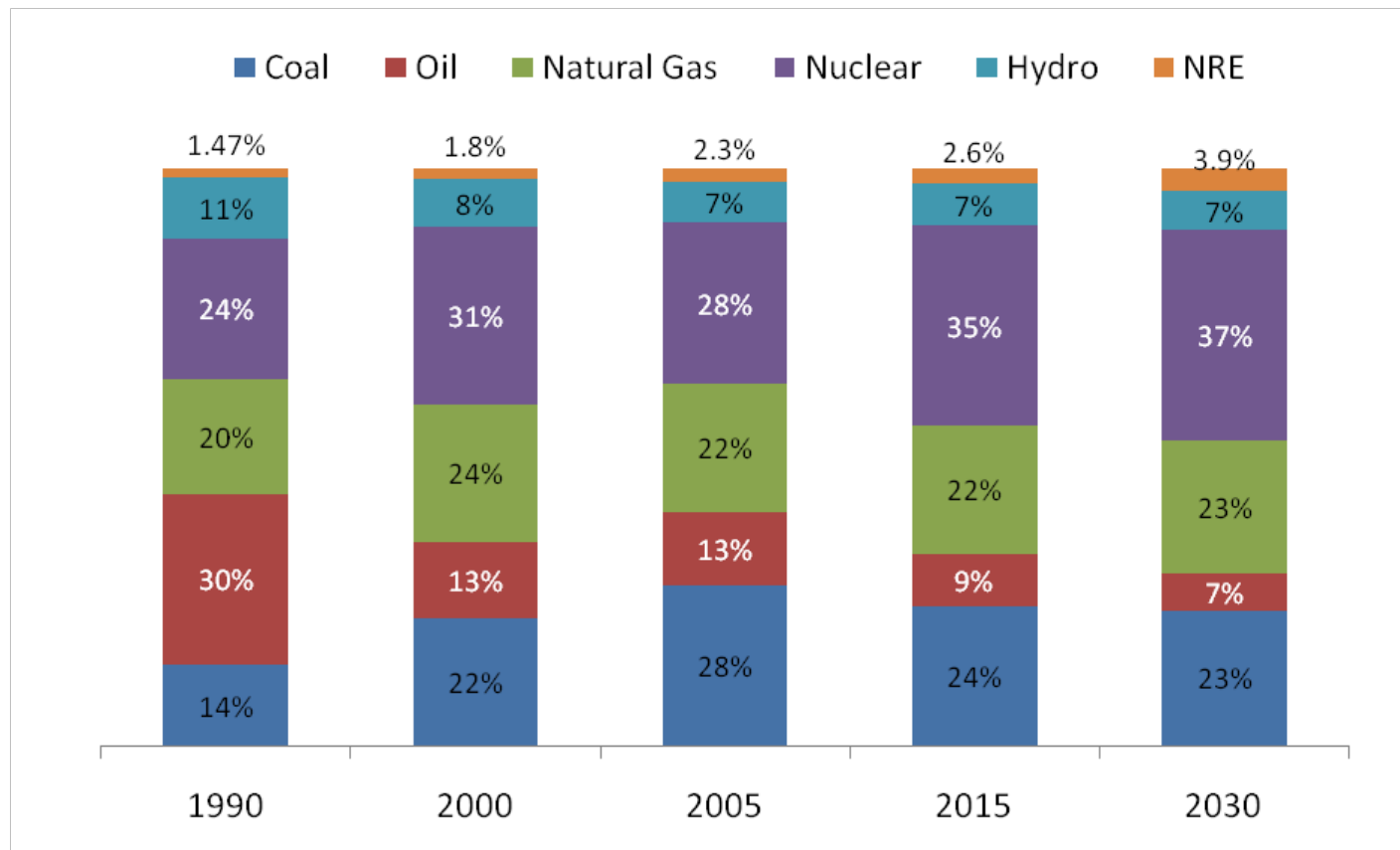
- Japan's final energy demand in 2030 will be 3.4% less than in 2005 (an average annual decrease of 0.1%).
- Energy demand is projected to decline in the industry sector (by 0.09% a year), transport sector (1.0%) and non-energy sector (0.4%)

PRIMARY ENERGY SUPPLY



- Japan's primary energy supply is projected to grow at an average annual rate of 0.1% through to 2030.
- Japan's energy intensity (TPES/GDP) is expected to improve by 24% over the outlook period.
- Japan's demand for oil is expected to decrease at an average annual rate of 0.9%.

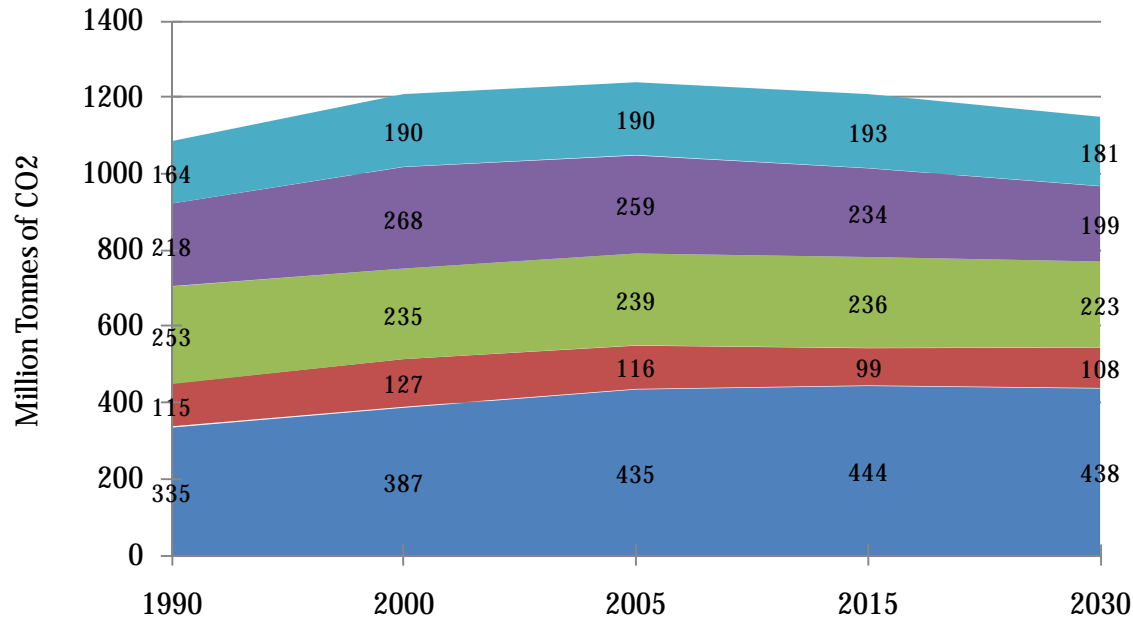
ELECTRICITY GENERATION MIX



- Japan's electricity demand is expected to increase at an average annual rate of 0.8% over the outlook period to 2030.
- Against this backdrop of increasing electricity demand, nuclear is projected to increase its share in the power generation mix from 28% in 2005 to 37% in 2030.

CO2 EMISSIONS

■ Electricity Generation ■ Refineries and Other Energy ■ Industry ■ Transport ■ Others



	(Average Annual Percent Change)			
	1990-2005	2005-2015	2015-2030	2005-2030
Change in CO ₂ Intensity of Energy	-0.3%	-0.8%	-0.3%	-0.5%
Change in Energy Intensity of GDP	0.2%	-0.7%	-1.2%	-1.0%
Change in GDP	0.9%	1.2%	1.2%	1.2%
Total Change	0.9%	-0.3%	-0.3%	-0.3%

- Japan's CO2 emissions from fossil fuel combustion are projected to decrease by about 10%, from 1,238 million tonnes of CO2 in 2005 to 1,119 million tonnes of CO2 in 2030.
- This is in line with the economy's falling energy demand, improving energy efficiency and decreased dependence on fossil fuels.

CHALLENGES & IMPLICATIONS (1/2)

- Taking considerable care in diversifying its energy sourcing into the future.
- Taking advantage of coal in an environmentally sustainable manner.
- Making every efforts to achieve a flexible LNG supply structure with lower prices.
- Engaging in dialogue and cooperative endeavours with other exporting and importing economies to increase energy security.
- Intensifying every efforts to achieve the best energy mix.

CHALLENGES & IMPLICATIONS(2/2)

- Strengthening energy related administrative and policy infrastructure.
- Taking an active role in implementation of international programmes such as CDM and JI.
- Providing a model of an economy acting to reduce CO2 emissions.
- Strengthening its world-leading role by means of technological transfer of knowledge and experience .



**Thank you
for your attention!**

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