Parallel Roundtable 1:
Refining and Petrochemical Sector;
New Growth Potentials and Rationalisation

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EAS Energy Outlook Result (BAU)

• Final Energy Consumption

![Graph showing energy consumption from 1990 to 2040.](image)

- **Final Energy Consumption**
  - **1.8 times** (2.3% P.A.)
  - **2.2 times** (3.5% P.A.)

Source: EAS Energy Outlook updated by ERIA in 2016
EAS Energy Outlook Result (BAU)

- Final Energy Consumption
  - Increment from 2013 to 2040 by energy

Source: EAS Energy Outlook updated by ERIA in 2016
EAS Energy Outlook Result (APS)

Source: EAS Energy Outlook updated by ERIA in 2016
EAS Energy Outlook Result (BAU)

- Oil Consumption

Source: EAS Energy Outlook updated by ERIA in 2016
Oil Issues

• Supply side
  – Current oil balance will continue or will be tight?
  – Trend of alternative fuel;
    • CNG, bio-fuels (ethanol, diesel, kerosene, …)

• Demand side
  – Increase of car ownership in emerging countries
  – Next generation vehicles (EV, FCV)
  – Security for terror attacks and natural disasters
    • Stockpiling, resilience of supply chain, diversification of supply sources