

# INDONESIA'S LNG SUPPLY AND FUTURE DEVELOPMENT

LNG Producer-Consumer Conference 2015

Japan, September 16th 2015





# AGENDA



## I. INDONESIA GAS RESERVE & PRODUCTION

## II. FUTURE GAS & LNG PROJECT

## III. Domestic Demand (Virtual Pipeline, Investment)

## IV. CLOSING REMARKS





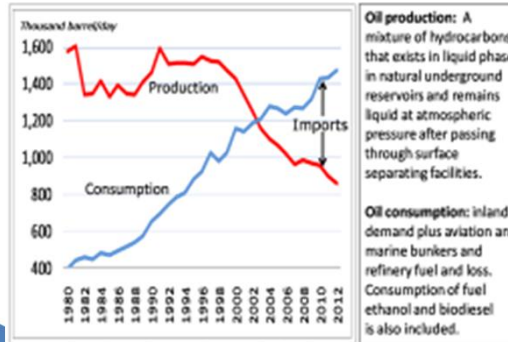
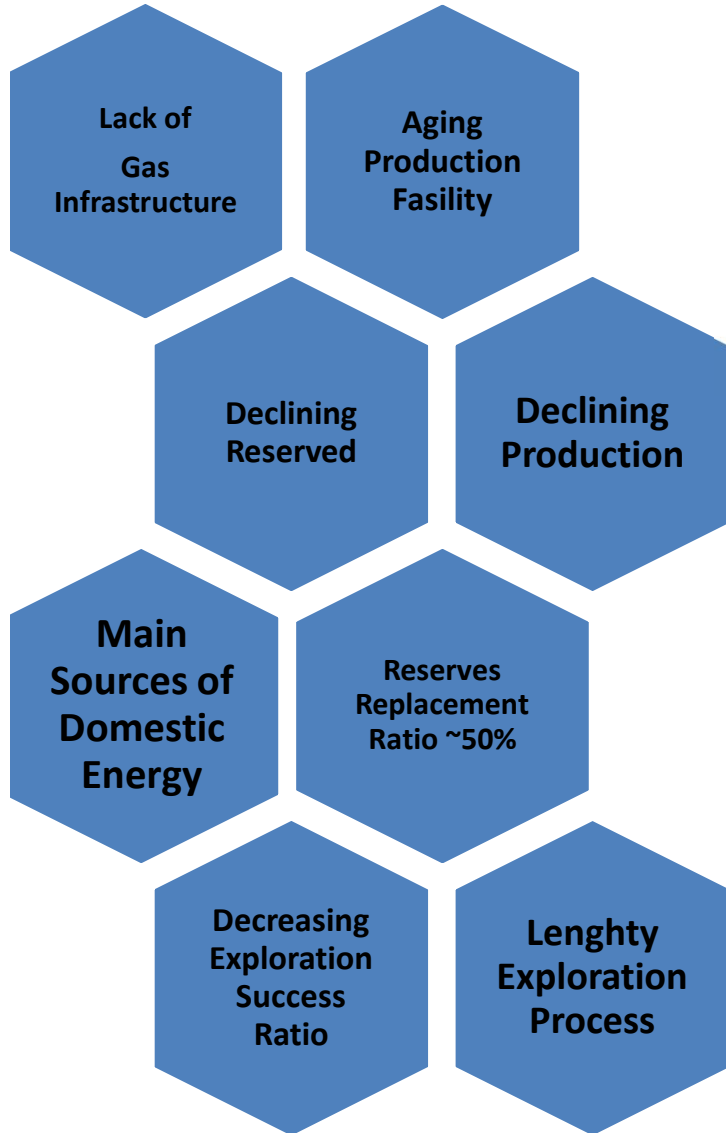
# I. Indonesia Gas Reserve & Production

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# INDONESIA'S UPSTREAM OIL & GAS

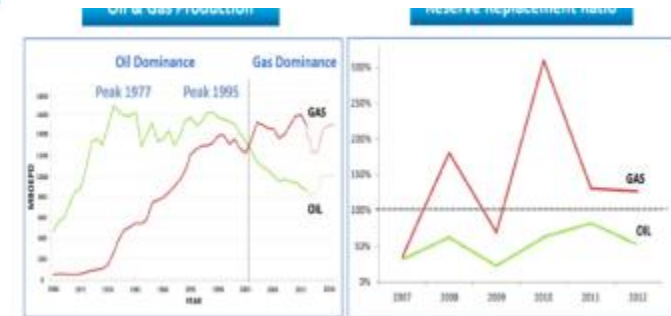
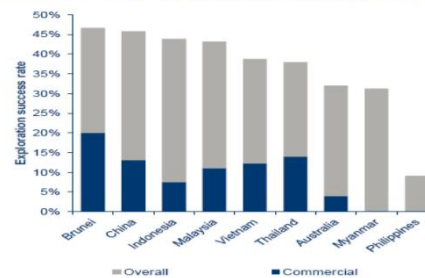


Source: United States Energy Information Administration, for oil production, and BP Statistical Review of World Energy, for oil consumption

## Indonesia's Gas Reserve

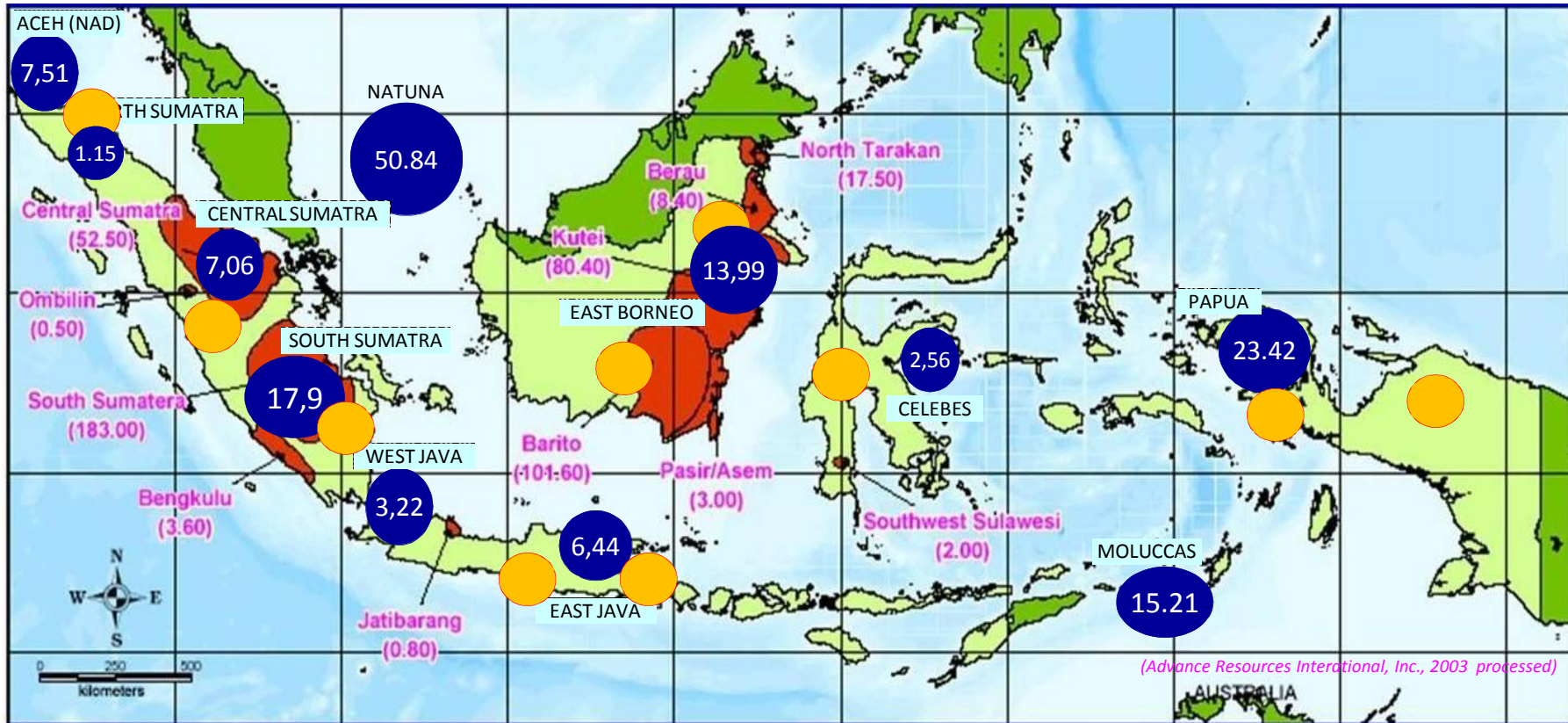


### Success rates by country (2010-2014)





# Indonesia's Gas Reserve



**GAS RESERVE**

**PROVEN** = 100,26 TSCF  
**POTENTIAL** = 49,04 TSCF  
**TOTAL** = 149,30 TSCF

**CBM RESOURCES = 453.30 TCF**

Total CBM Basin = 11  
*(Advance Resources International, Inc., 2003)*

Contracts Signed up to Aug 2015 :  
54CBM PSCs

**SHALE GAS POTENTIAL= 574 TCF**

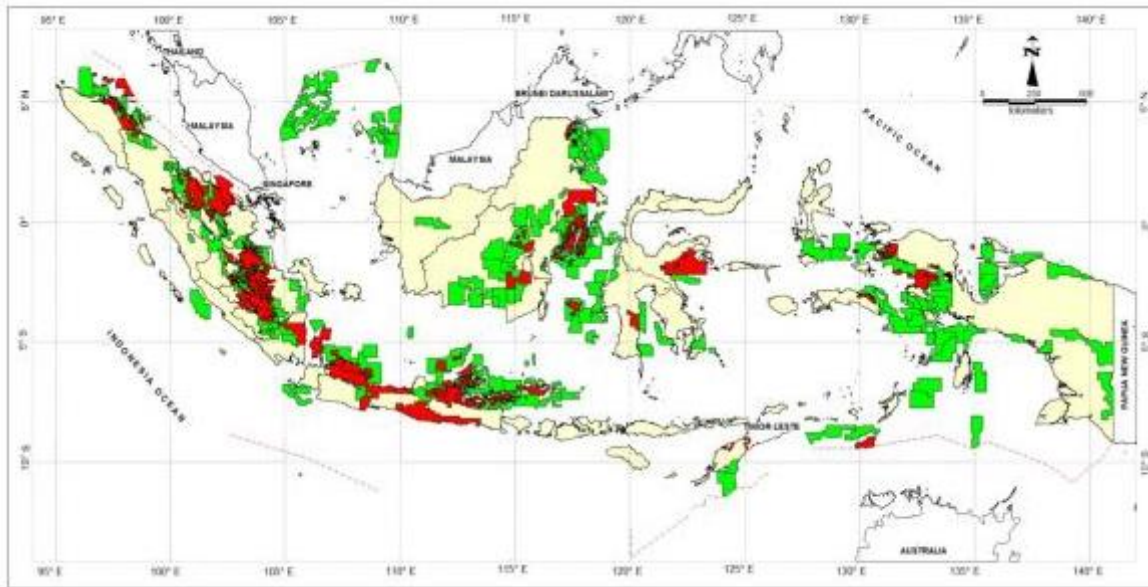
Total Shale Gas Basin = 14  
*(Geology Agency, 2010)*

1<sup>st</sup> Unconventional PSC was signed on May 2013,  
Currently 5 PSC

As of January 1<sup>st</sup> 2014



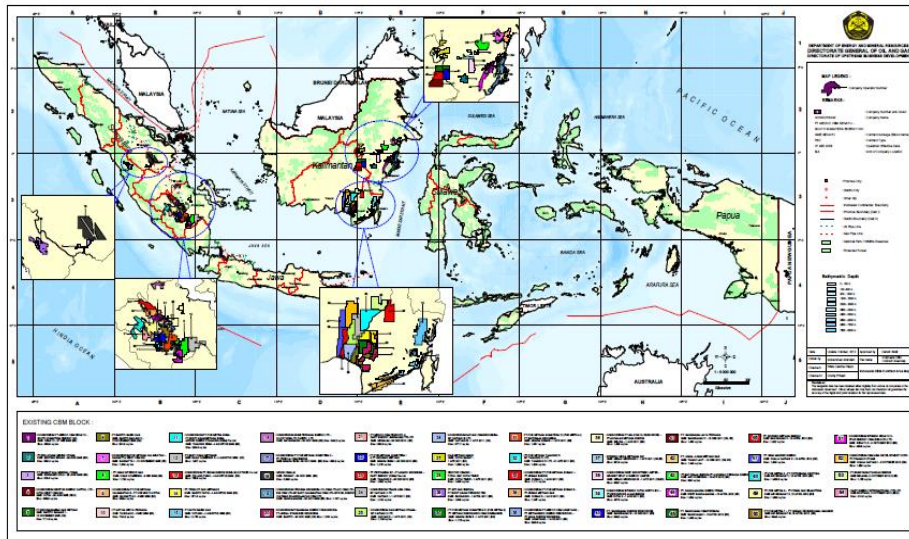
# INDONESIA'S OIL AND GAS WORKING ACREAGES



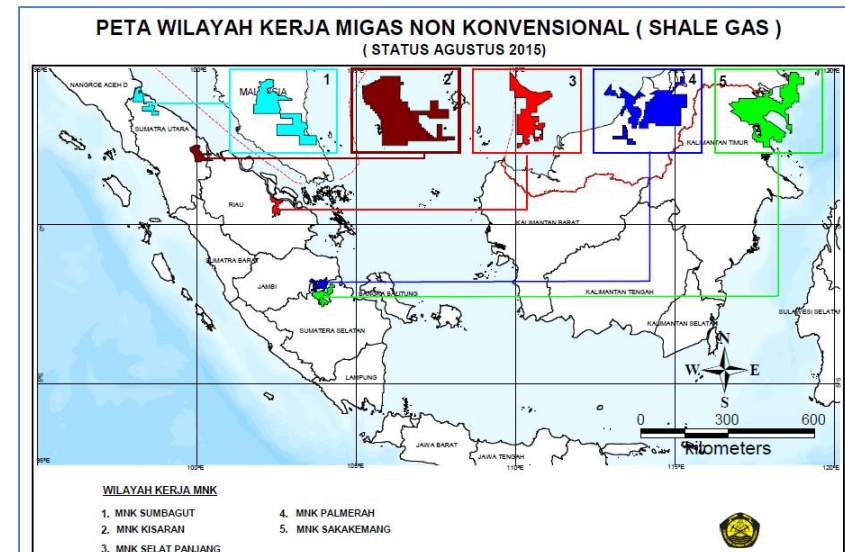
■ Produksi

■ Eksplorasi

**54 CBM PSC**



**5 SHLE GAS PSC**





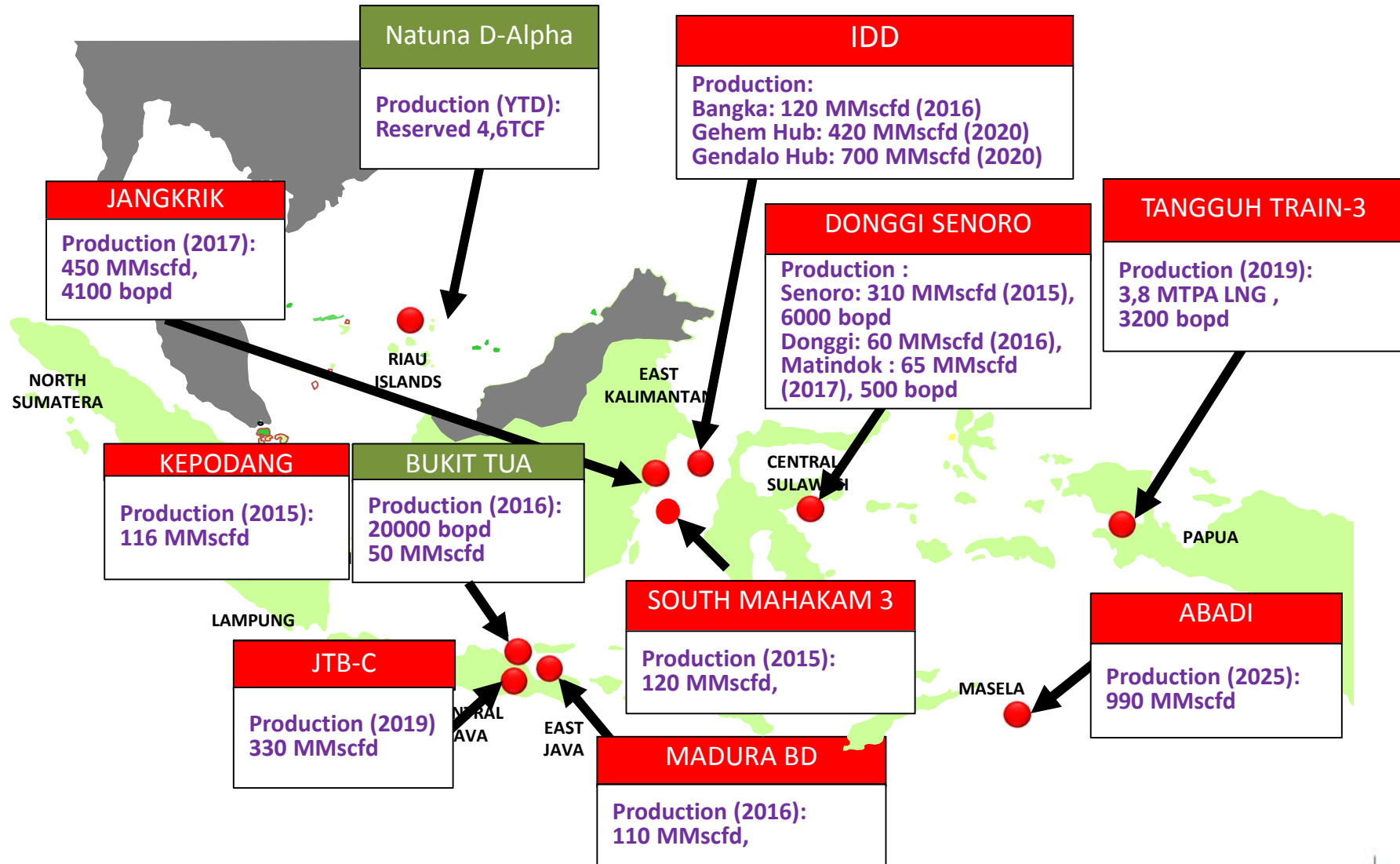
## II. Future GAS & LNG Project

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# ONGOING FUTURE Gas Projects



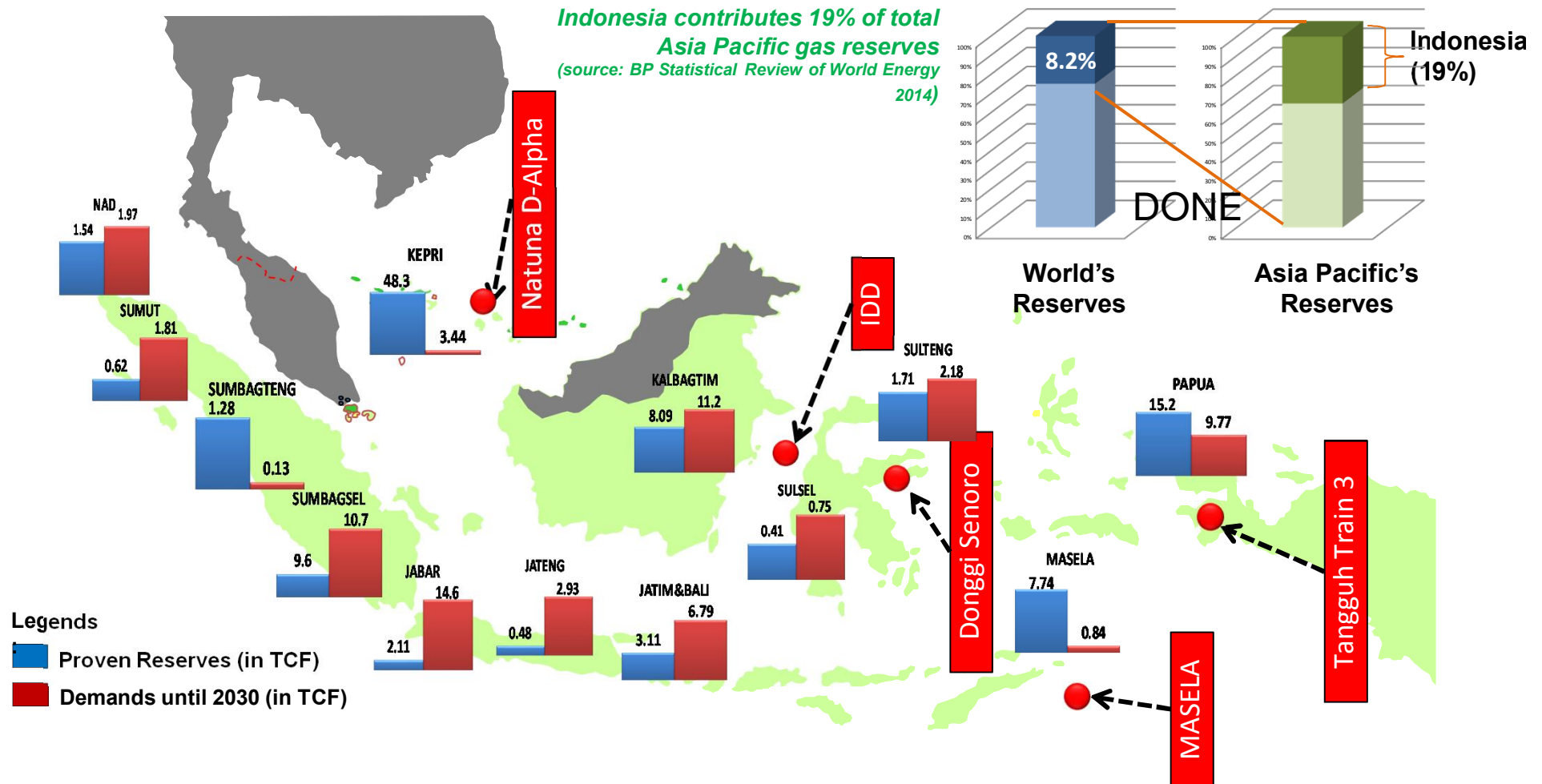




# Pengembangan Lapangan Gas Secara Lebih Optimal Akan Membutuhkan Dukungan Infrastruktur Yang Memadai

Sebaran Cadangan Gas di Indonesia, *(source: Indonesian Annual Reserve Report as of 1-1-2014)*

Sebaran Permintaan Gas (Contracted) di Indonesia, *(source: Indonesian Gas Balance Report as of Q1 2015)*





## III. Domestic Demand

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# GAS INFRASTRUCTURE INVESTMENT OPPORTUNITIES 2015 – 2025

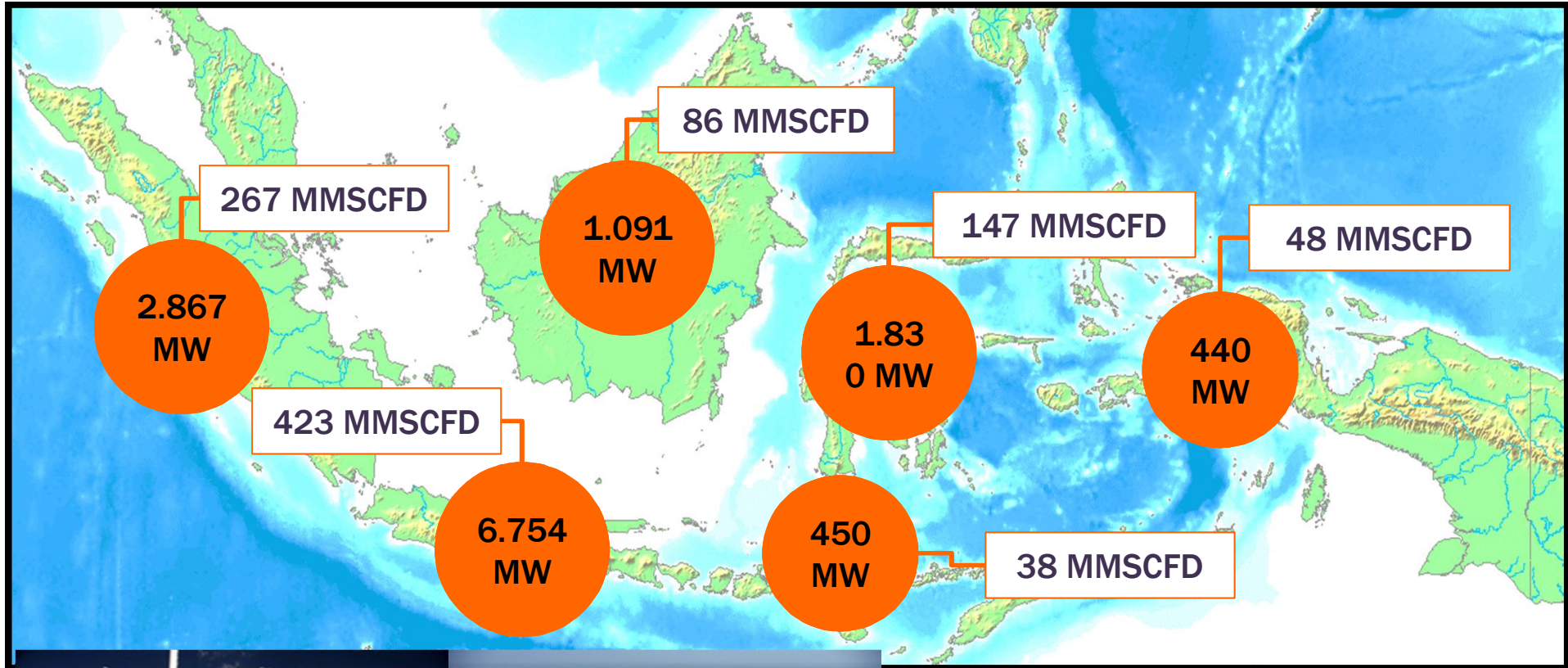


INVESTMENT		
<b>Pipeline</b> USD 8.5 billion	<b>Liquefaction &amp; Regasification</b> USD 8 billion	<b>LPG</b> USD 0.42 billion
<b>Gas Station</b> USD 13 billion	<b>City Gas</b> USD 2.5 billion	<b>TOTAL</b> <b>USD 32.42 billion</b>



# 35.000 MW ELECTRICITY PROJECT

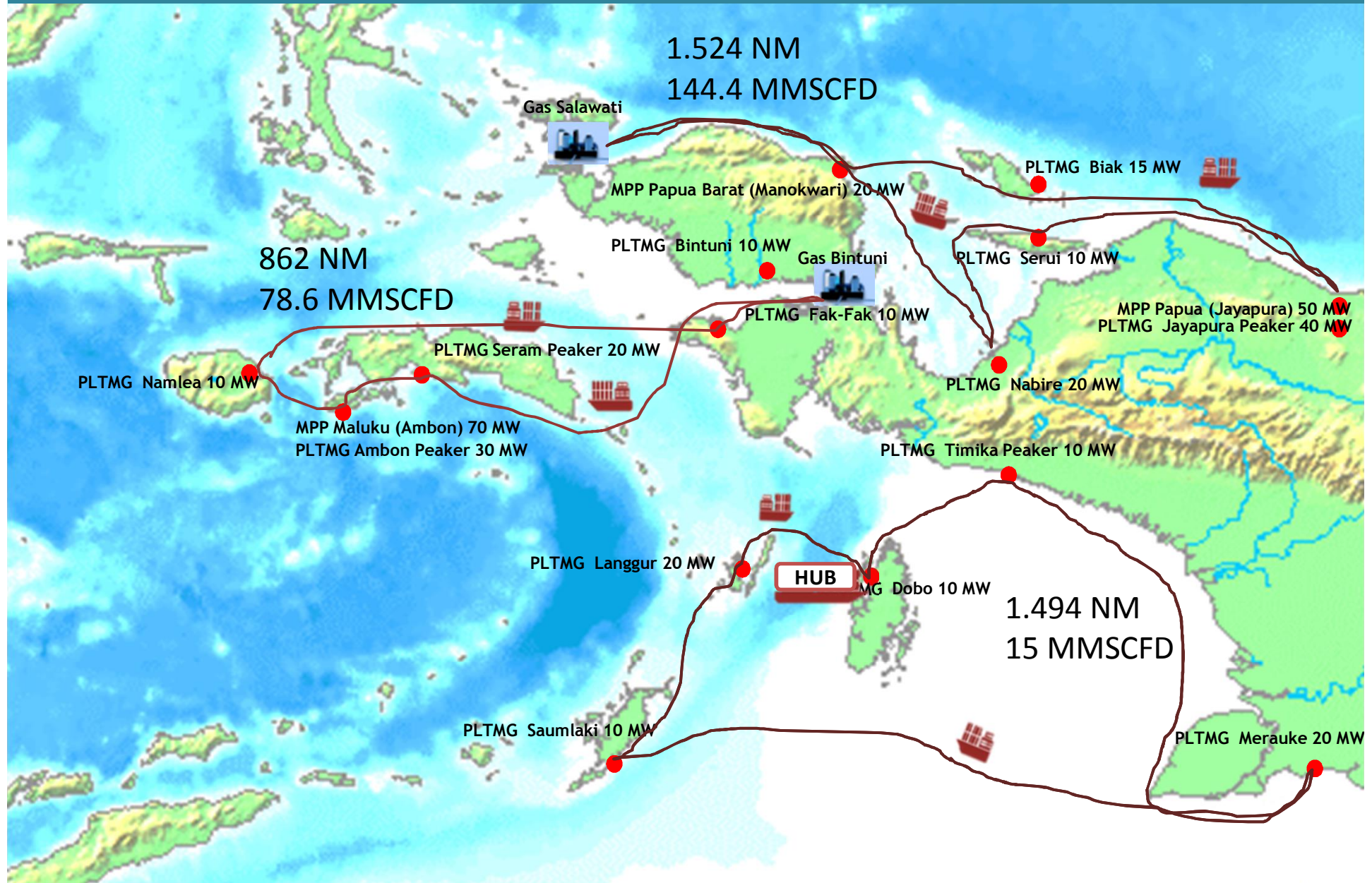
→ Opportunity as an Anchor Buyer



**TOTAL GAS NEEDED:  
1.009 MMSCFD**

**TOTAL POWER: 13.432 MW (38%)**

# VIRTUAL PIPELINE FOR GAS POWER PLANT IN PAPUA & MALUKU





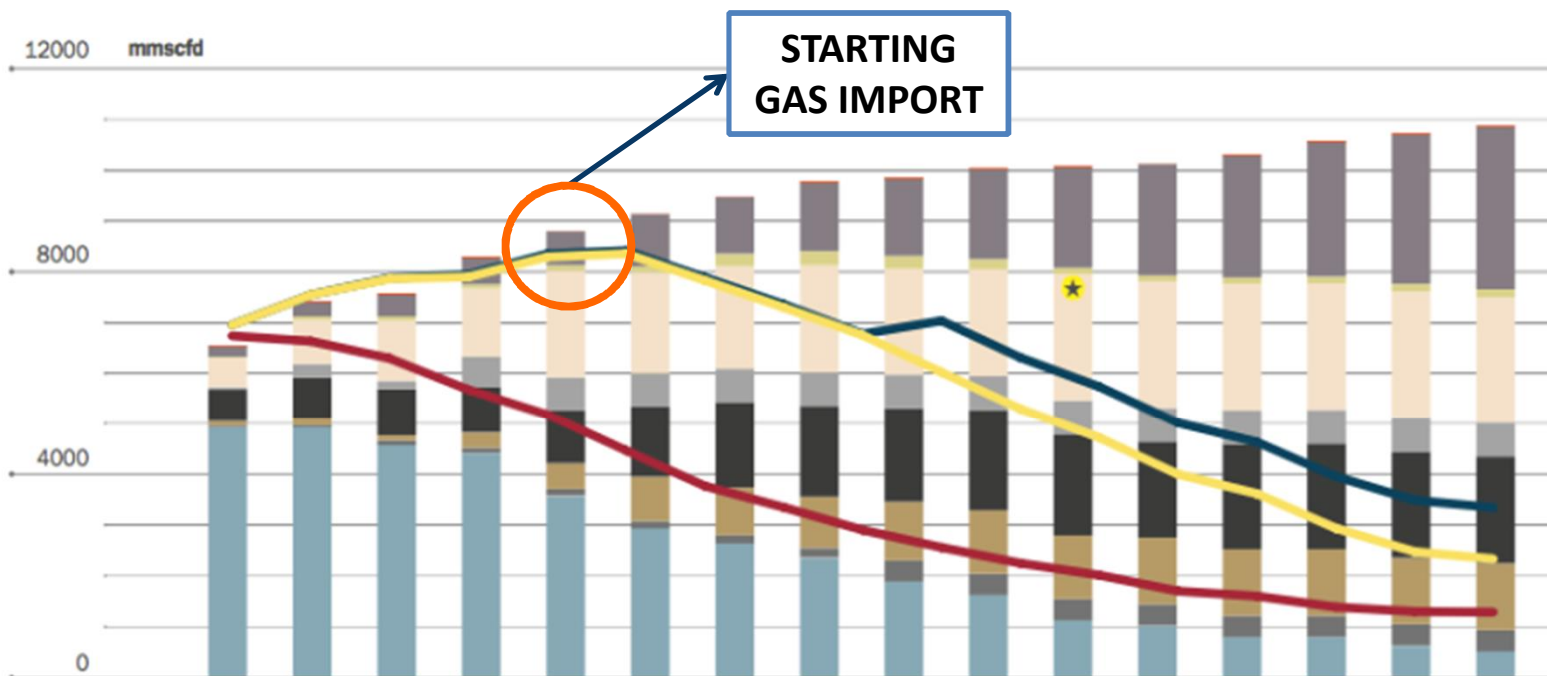
# V. Closing Remarks

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# INDONESIA GAS BALANCE YEAR 2015 - 2030



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
City Gas (Committed)	1	3	5	7	9	10	10	10	10	10	10	10	10	10	10	11
Potential Demand Industry	198	258	396	504	622	966	1049	1260	1443	1661	1855	2064	2260	2496	2762	3022
Transportation (Committed)	20	63	75	79	104	116	231	260	243	196	118	111	120	130	142	154
Industry (Committed)	541	819	1120	1263	1975	1870	1904	1988	1960	1977	2349	2350	2347	2348	2349	2329
Kelistrikan (Committed)	589	761	870	857	990	1309	1598	1698	1743	1871	1880	1780	1950	1958	1964	1974
Pupuk (Committed)	86	139	97	290	476	819	884	949	1083	1175	1175	1230	1230	1230	1230	1236
Lifting and Own Used (Committed)	27	27	90	98	128	139	150	176	396	396	396	396	396	396	396	397
Domestic (Contracted)	4640	4675	4321	4154	3349	2777	2492	2216	1786	1534	1071	962	761	753	583	489
Potential Supply	2	17	42	61	61	61	61	25	22	22	22	22	1022	1022	1017	1014
Project Supply	264.5	693.5	1428.5	1866.1	2127.3	2635.6	2586.5	3206.6	3199.7	2975.3	3699.9	3482.1	3082.1	2776.5	2488.4	2047.3
Existing Supply	6434	6508	6020	5431	4887	4327	3933	3486	3086	2719	2239	1891	1812	1344	1270	1202

★ Forecast DEN: Kebutuhan Gas tahun 2025 diperkirakan sebesar 20% dari Bauran Energi Nasional (7134 BOED), setara 8248 BBTUD



# Closing Remarks

1



Prospective of Indonesia Gas Supply Development from Conventional and Unconventional encourage with some Attractive Incentive → Challenging

2

Gas Demand for the next 5 years:  
8,679 MMSCFD  
(1.2x from current demand)

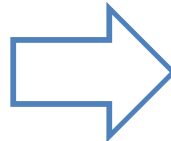


  
**INFRASTRUCTURE  
NEEDED**



  
**INVESTMENT  
NEEDED**

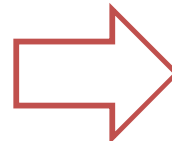
3



Virtual Pipeline for Eastern Part of Indonesia

To initiate this, the anchor buyer will be for electricity sector and develop the area surrounds it.

4



**ASEAN LNG Hub**  
(Hub for LNG price reference in ASEAN territory)





# Thank You

[www.esdm.go.id](http://www.esdm.go.id)

