２０１９年１２月２５日

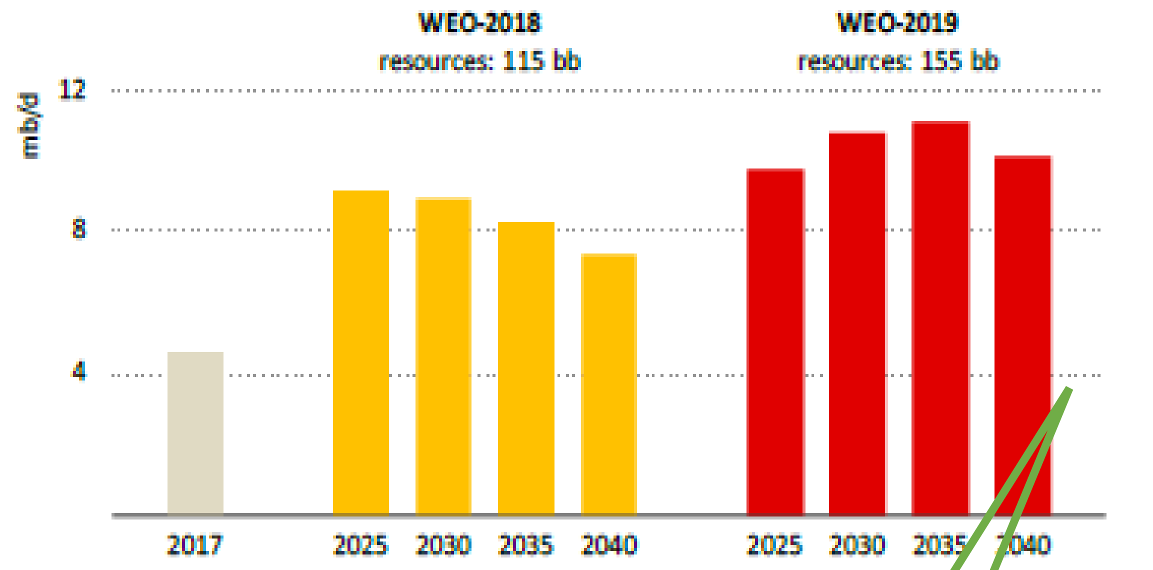
国際エネルギーシンポジウム World Energy Outlook 2019

日本経済新聞社
論説委員兼編集委員
松尾博文

NIKKEI

シェール革命いつまで

Figure 1.9 ▷ US tight oil production and assumed resources in the announced policies scenarios of the *WEO-2018* and *WEO-2019*



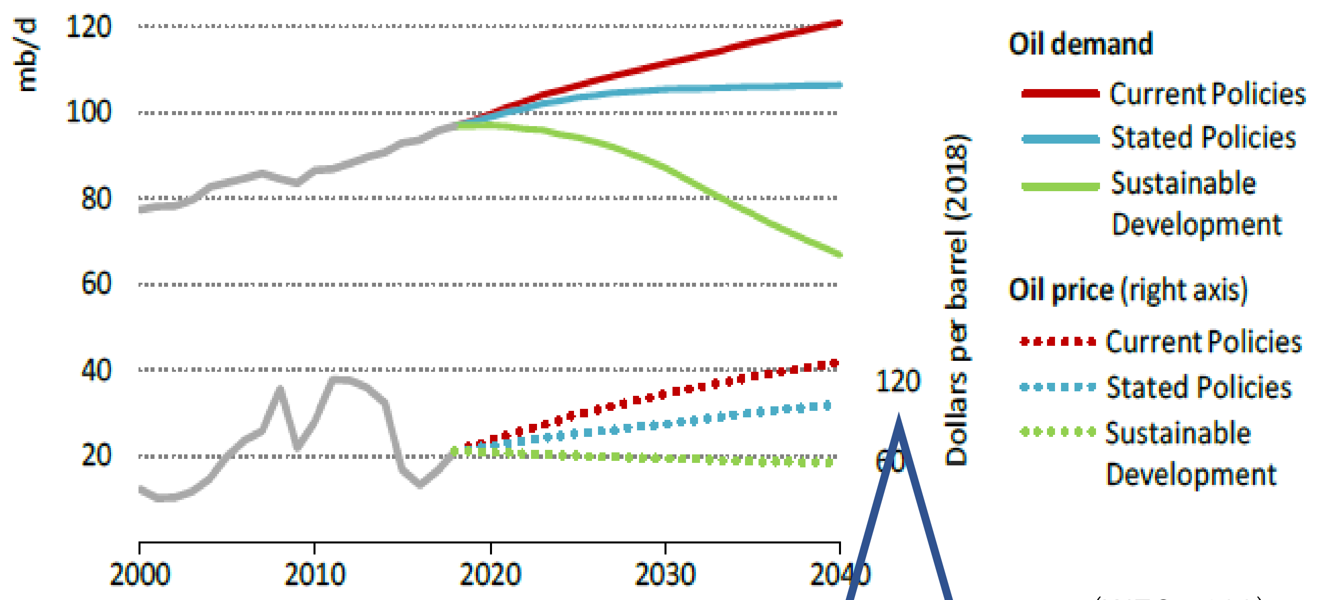
Upward revisions to US tight oil numbers means tight oil production peaks later in WEO-2019 than WEO-2018 and does not decline as steeply in the later years of the Outlook

Notes: bb = billion barrels. Compares the Stated Policies Scenario in the *WEO-2019* and the New Policies Scenario in the *WEO-2018*.

（WEO2019 p52）

その先は？

Figure 3.2 ▷ Global oil demand and crude oil price by scenario



（WEO p133）

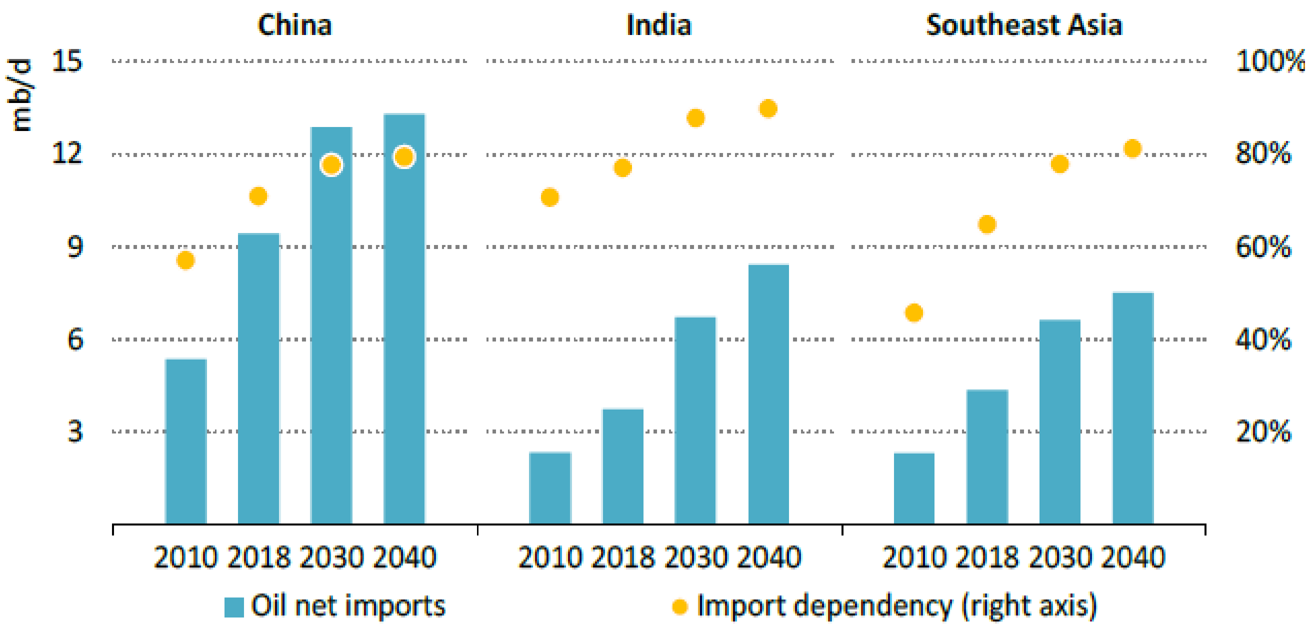
In the Stated Policies Scenario, demand growth slows substantially after 2025, while the Sustainable Development Scenario paints a very different picture for demand and prices

NIKKEI

適切な開発投資は続くか？

高まるアジアの輸入依存度

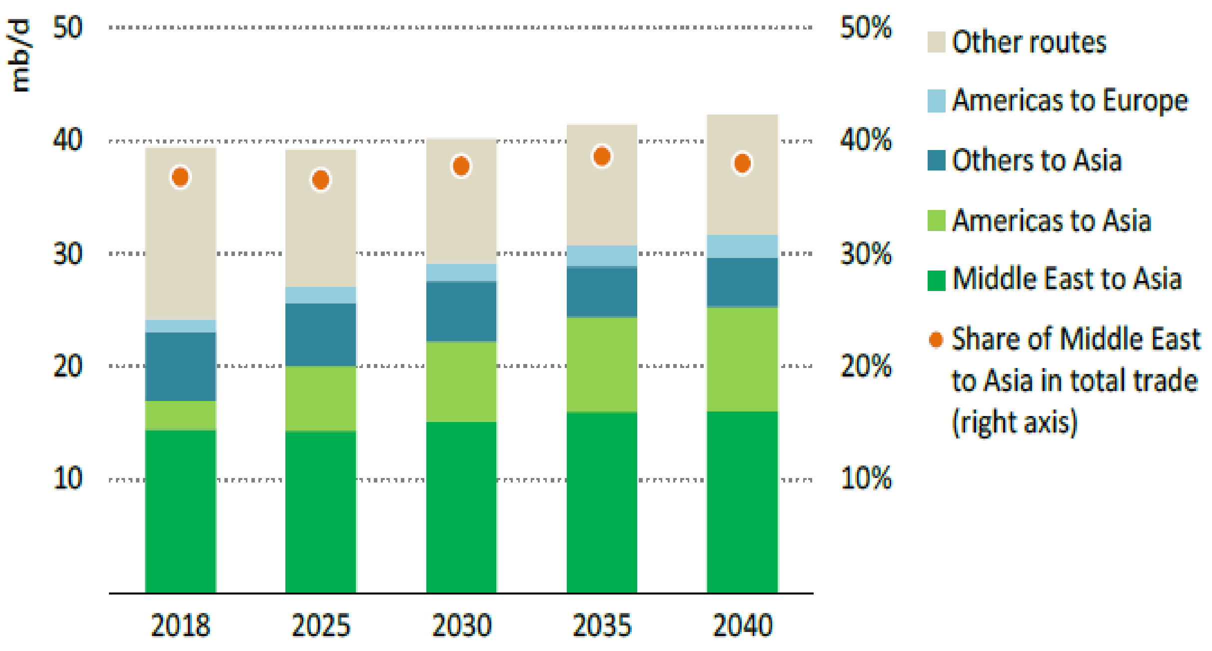
Figure 3.15 ▷ Oil net imports and import dependency in selected developing Asian economies in the Stated Policies Scenario



By 2040, over 80% of oil demand in developing economies in Asia is met by imports, stimulating a strong acceleration in oil trade flows to Asia

(WEO2019 p165)

Figure 3.16 ▷ Seaborne crude oil trade by route in the Stated Policies Scenario



Despite the rapid growth of tight oil output, trade flows from the Middle East to Asia are set to remain the mainstay of global crude oil trade

(WEO2019 p166)

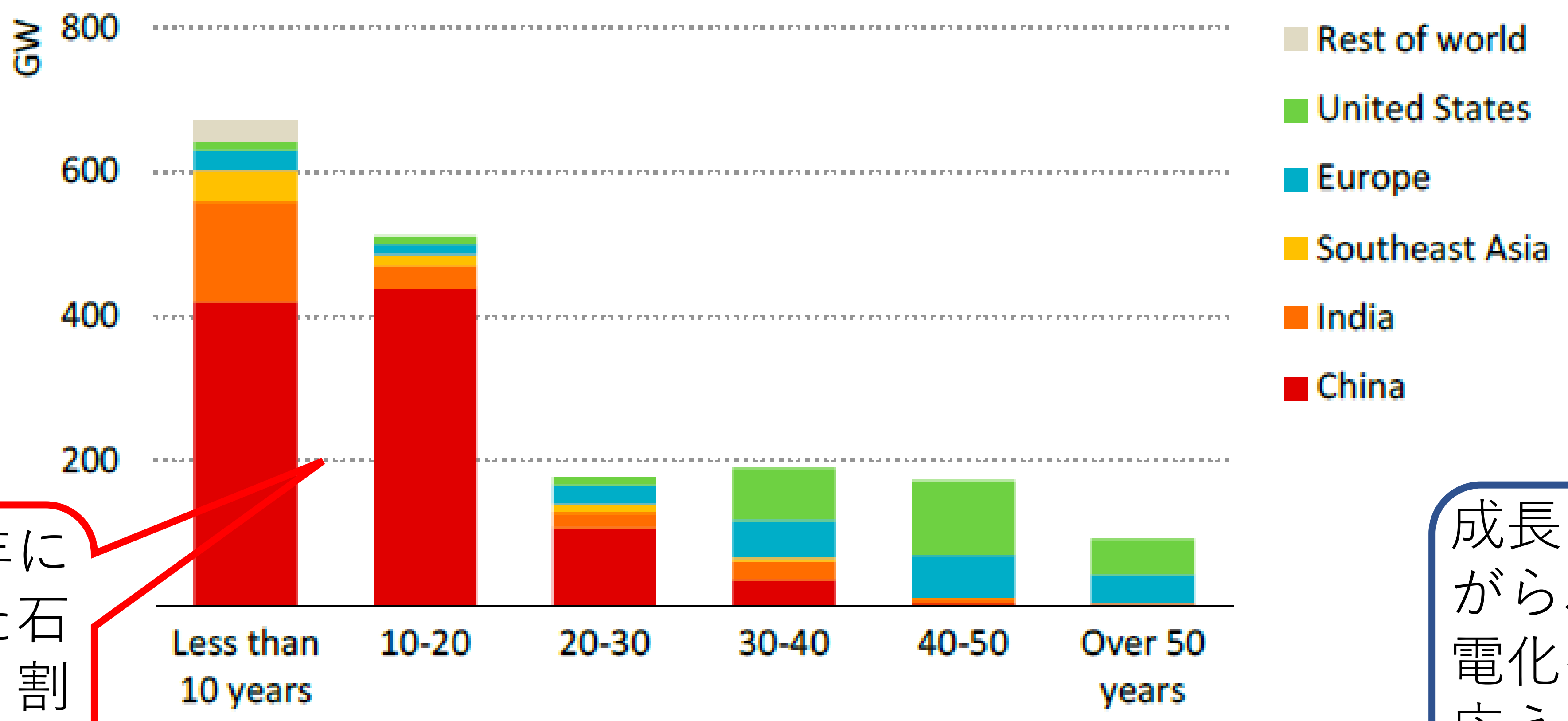
アジアの原油輸入依存度は８割を超える

アジアの中東依存度は高止まりが続く

NIKKEI

石炭を捨てられるのか

Figure 6.16 ▷ Global coal-fired power capacity by plant age, 2018



Asia is home to 90% of coal-fired power plants under 20 years of age

過去２０年に建設された石炭火力の９割はアジアに

成長を維持しながら、脱炭素、電化への要請に応えるには？

（WEO2019 p284）

NIKKEI

これからのエネルギー安全保障は

- 増大するエネルギー需要、
  ・原油・天然ガスを安定輸送する「伝統的」なシーレーン確保の重要性は変わらない。

- 偏在する再エネ「資源」、低コストの再エネに恵まれない日本・アジア。それだけでは力不足だとすれば……
  ・化石燃料を使い続ける技術
  ・太陽光や風力を域内で融通（輸入・輸出）する知恵

- エネルギー転換を乗り切る「アジア型」のエネ安保
  ・資源国巻き込み、アジア大での水素バリューチェーン構築

NIKKEI

お問い合わせ: report@tky.ieej.or.jp