

# **The Rise of Asia's National Oil Companies: Competitive Issues and Geopolitical Implications**

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## **Panel 1: Prospects and Developments For Asia's NOCs**

**May 3, 2007**

## Top 10 Oil Consumers and Importers

CONSUMERS		2005 RANK	IMPORTERS	
COUNTRY	MMB/D		COUNTRY	MMB/D
United States	20.7	<b>1</b>	United States	12.4
<b>China</b>	6.9	<b>2</b>	<b>Japan</b>	5.2
<b>Japan</b>	5.4	<b>3</b>	<b>China</b>	3.1
Russia	2.8	<b>4</b>	Germany	2.4
Germany	2.6	<b>5</b>	<b>South Korea</b>	2.2
<b>India</b>	2.6	<b>6</b>	France	1.9
Canada	2.3	<b>7</b>	<b>India</b>	1.7
Brazil	2.2	<b>8</b>	Italy	1.6
<b>South Korea</b>	2.2	<b>9</b>	Spain	1.6
Mexico	2.1	<b>10</b>	Taiwan	1.0

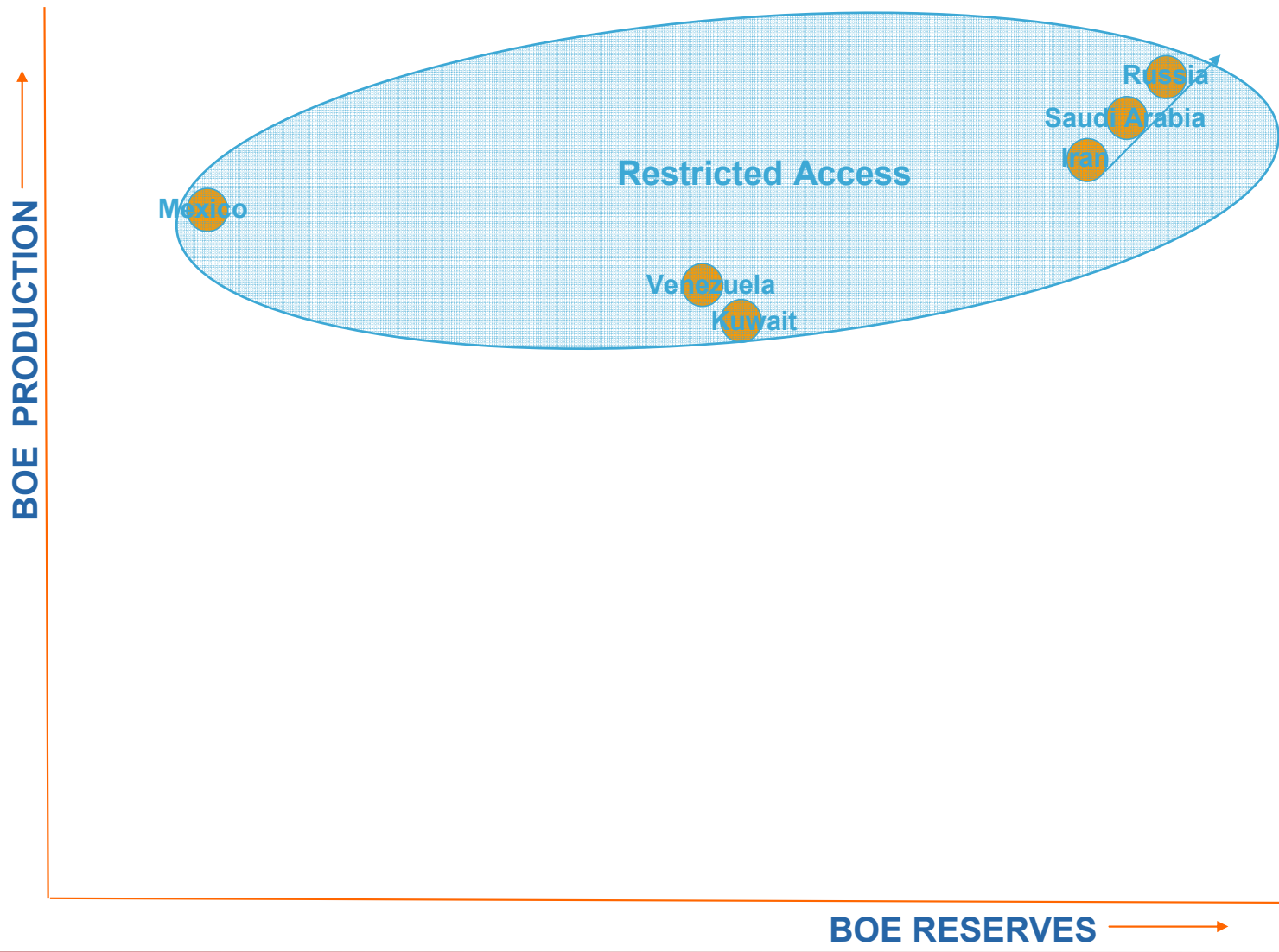
## How do China and India compare?

UPSTREAM FACTORS	CHINA	INDIA
Is there a separate Ministry of Energy?	No	Yes
Is there an independent regulatory body?	No	Yes
Number of bid rounds to date	4	7
Annual oil production in mmb/d	3.6	0.8
Increasing or decreasing oil imports?	35%+	70%+
Who is dominant in the sector?	NOCs	NOCs
Are the major IOCs present?	Yes	No
How many oil companies invest in the sector?	44	21
Ratio of basins to producing basins	424/150	26/6

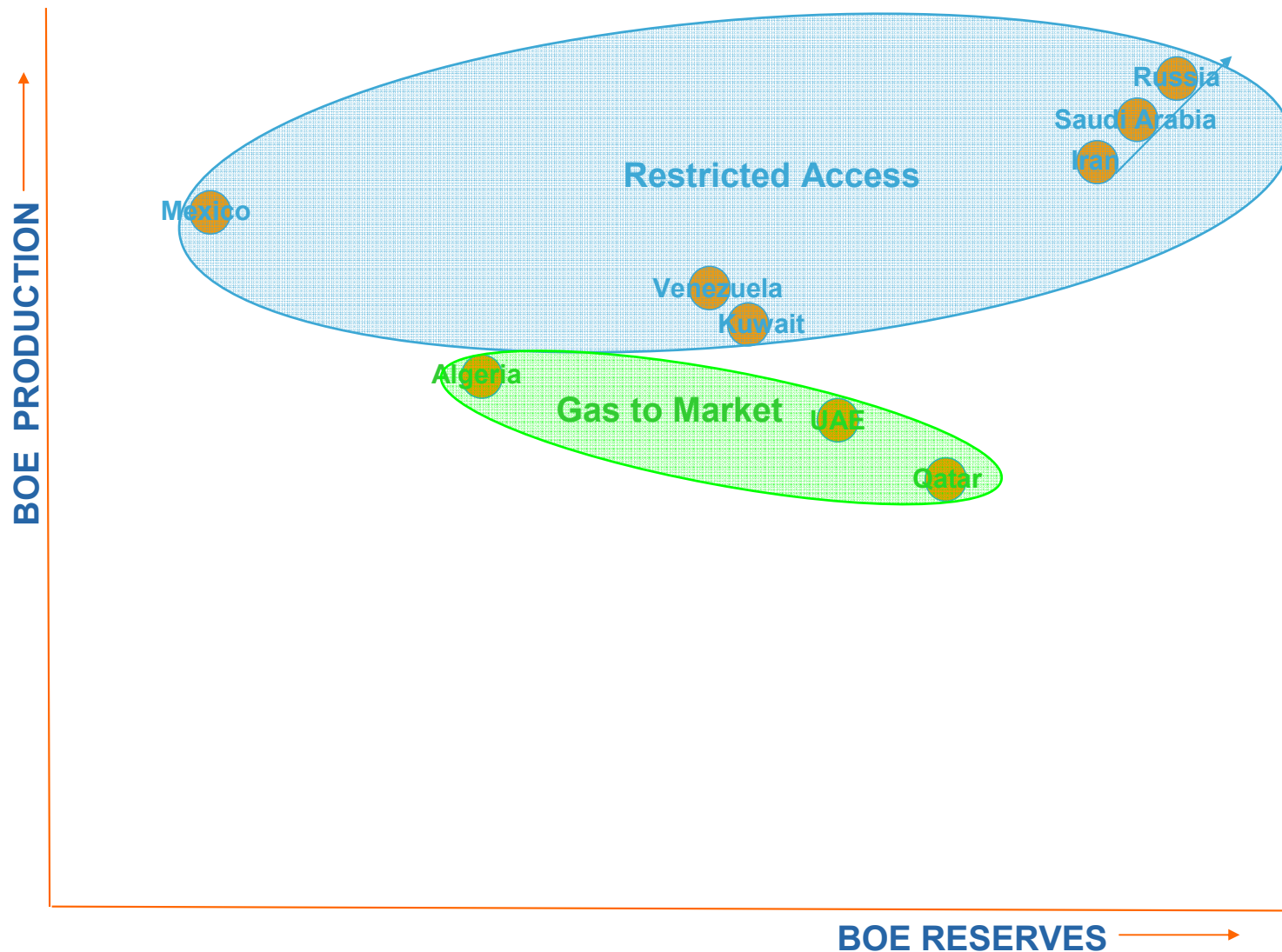
# Top 25 Countries with NOCs in 2005



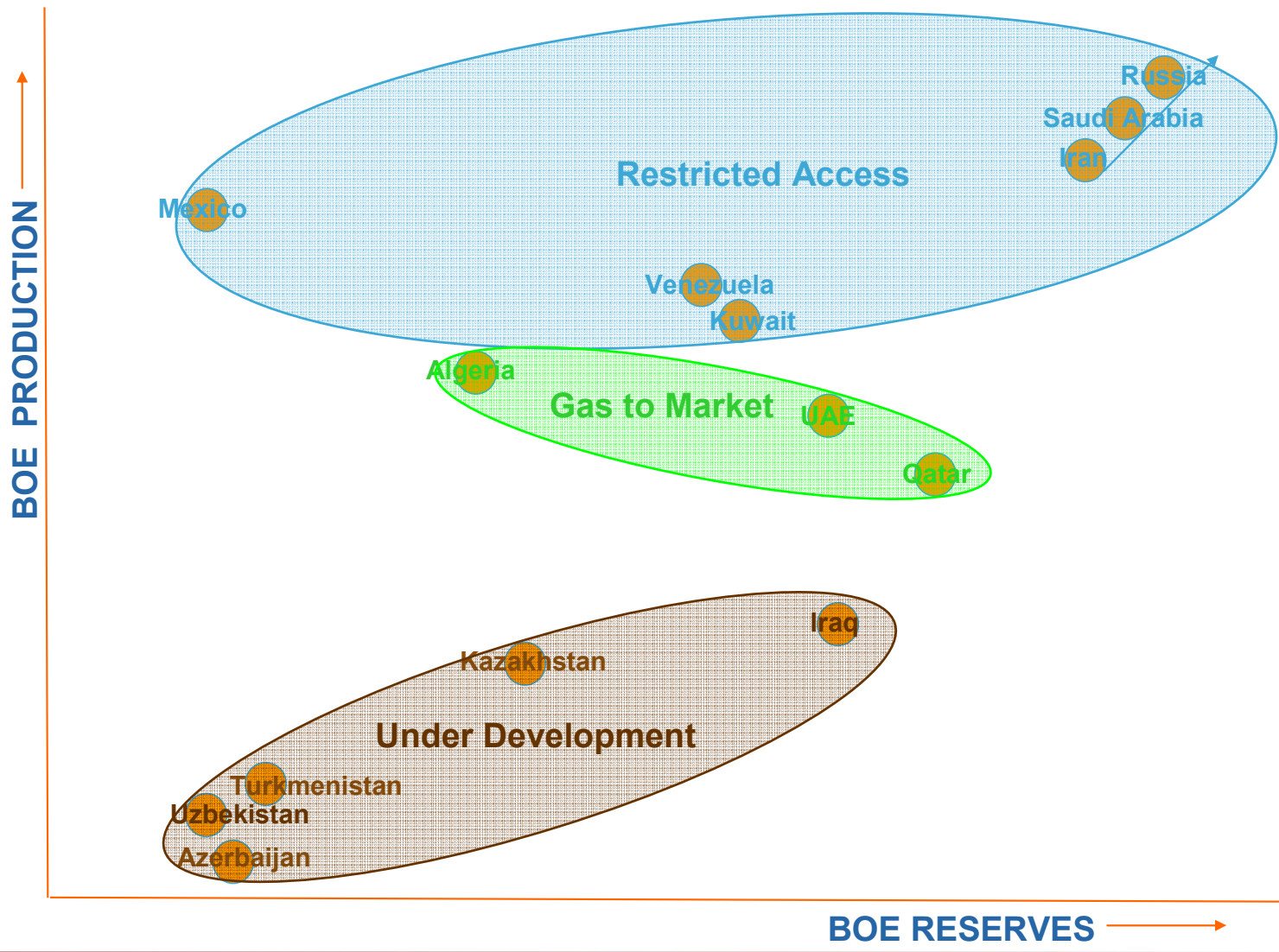
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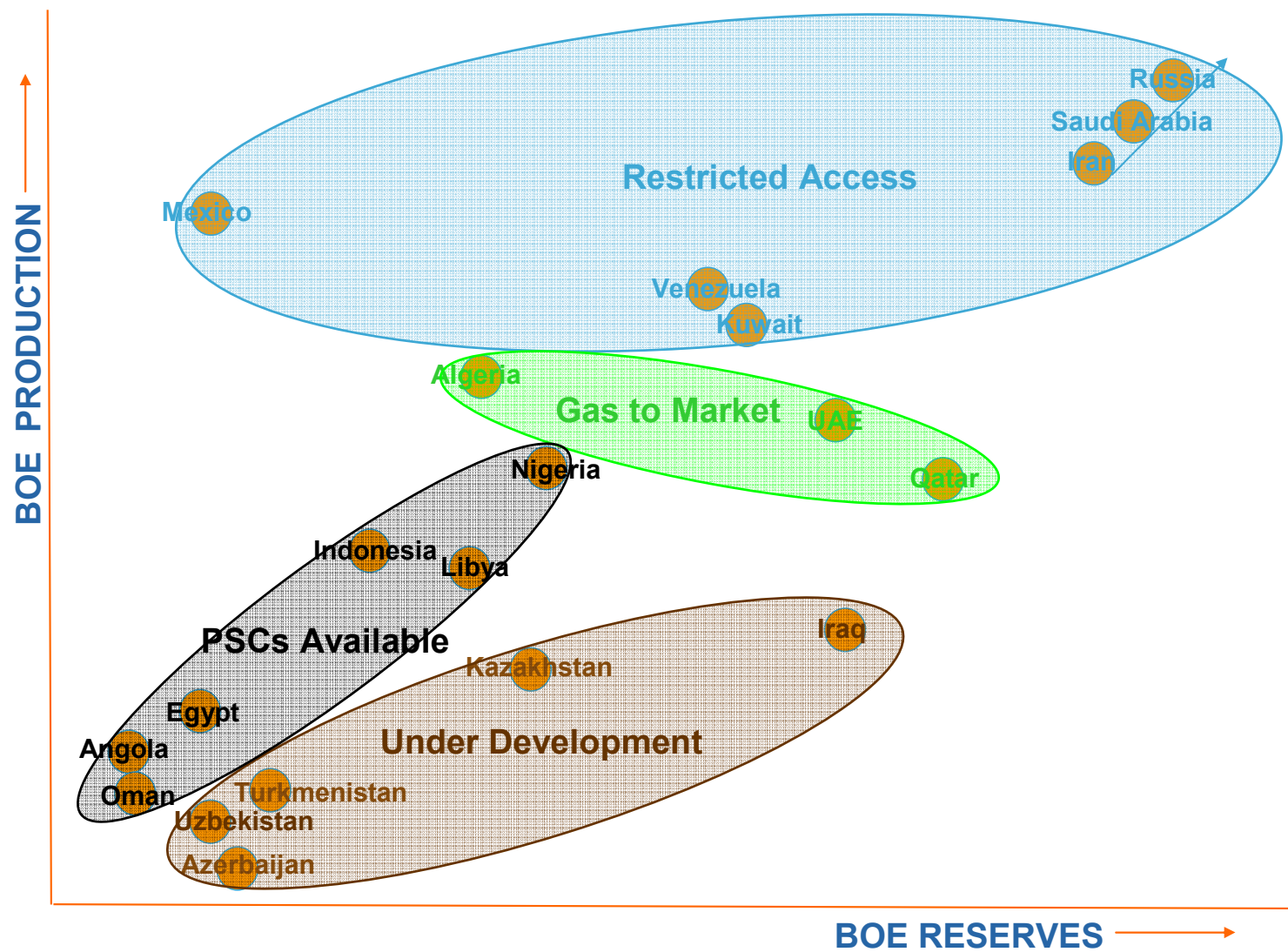
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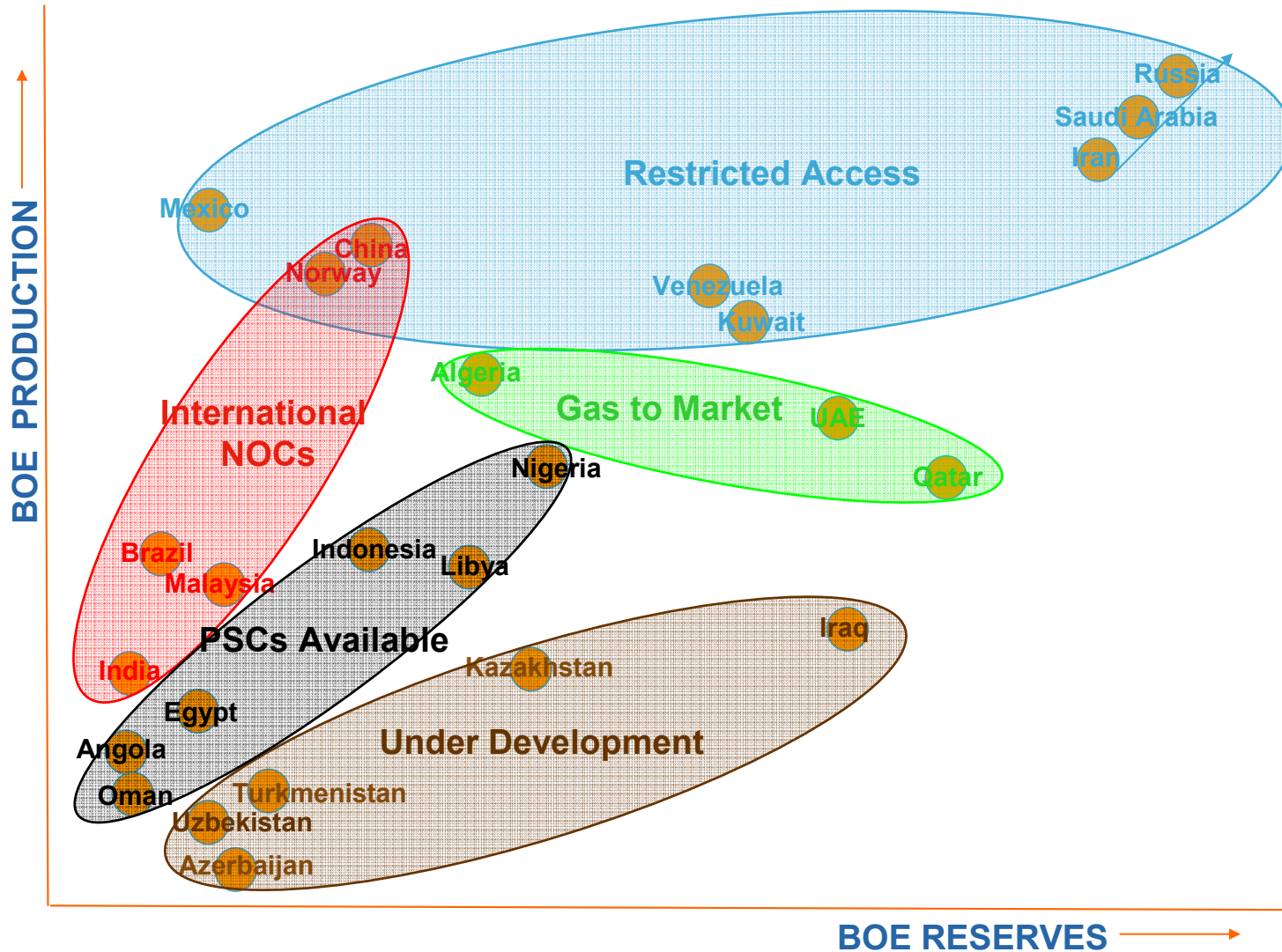


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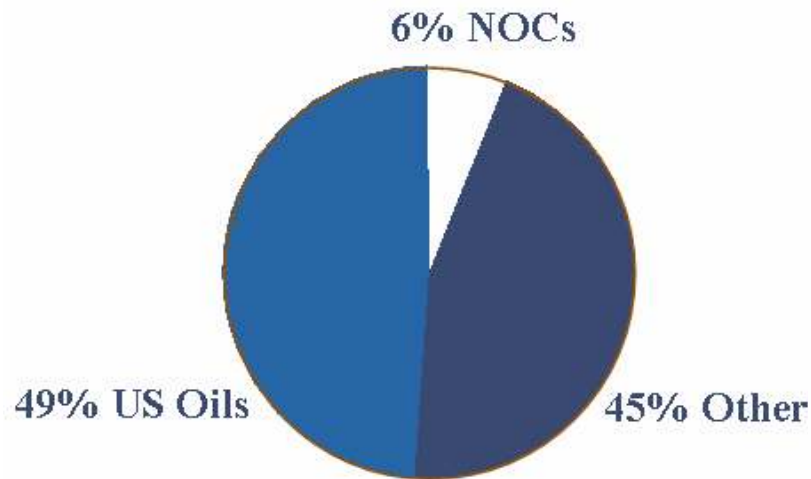




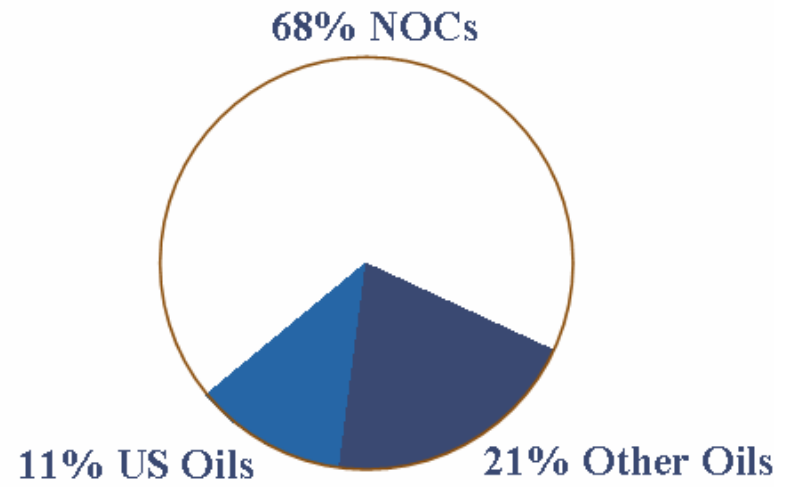
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# Where are the NOCs going?



1970 Oil Production



2005 Oil Production

# Today's participants

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## China

**Trevor Houser**  
**Jing Huang**

## India

**Juli MacDonald**  
**Teresita Schaffer**

## Japan & Korea

**Peter C. Evans**  
**Hirohide Hirai**