



# Taiwan Analysis Brief

Last Updated: April 2026

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## Overview

**Table 1. Taiwan energy indicators, 2024**

	Petroleum and other liquids	Natural gas	Coal	Nuclear	Hydro	Other renewables	Total
Primary energy production (quads)	<0.01	<0.01	0.0	0.12	0.01	0.12	0.26
Primary energy production (percentage)	< 1%	< 1%	0%	47%	6%	47%	100%
Primary energy consumption (quads)	1.71	1.13	1.44	0.12	0.01	0.13	4.54
Primary energy consumption (percentage)	38%	25%	32%	3%	<1%	3%	100%
Generation (billion kWh)	4.18	122.50	109.59	12.18	4.21	29.71	282.4
Generation (percentage)	1%	43%	39%	4%	1%	11%	100%

Data source: U.S. Energy Information Administration, International Energy Statistics and estimates

Note: Primary energy does not include biofuels and other gases. Generation does not include stored pumped hydro. Total may not equal 100% due to independent rounding. Quads=quadrillion British thermal units, kWh=kilowatthours

- Taiwan's gross domestic product grew by 5.3% in 2024, while its population declined slightly to 23.2 million people.<sup>1</sup>
- Taiwan has very few domestic natural resources and must rely on oil, natural gas, and coal imports to satisfy most of its energy demand. It imported over 94% of its energy demand in 2024.<sup>2</sup> Taiwan's primary energy production has been declining since 2019 due to declining electricity generation from nuclear energy, and in 2024, primary energy decreased by 12%. Virtually all of its production in 2024 came from nuclear (47%) and non-hydro renewables (47%).<sup>3</sup> In 2025, Taiwan closed its last operating nuclear power plant.<sup>4</sup>
- Taiwan's primary energy production has declined every year since 2020, decreasing from 0.41 quadrillion British thermal units (quads) in 2019 to 0.26 quads in 2024.<sup>5</sup>
- Its primary energy consumption decreased almost 5% in 2024 from the previous year and was met mostly by fossil fuels. Petroleum and other liquids accounted for the largest share (38%), followed by coal (32%) and natural gas (25%).<sup>6</sup>

Figure 1. Map of Taiwan (2025)



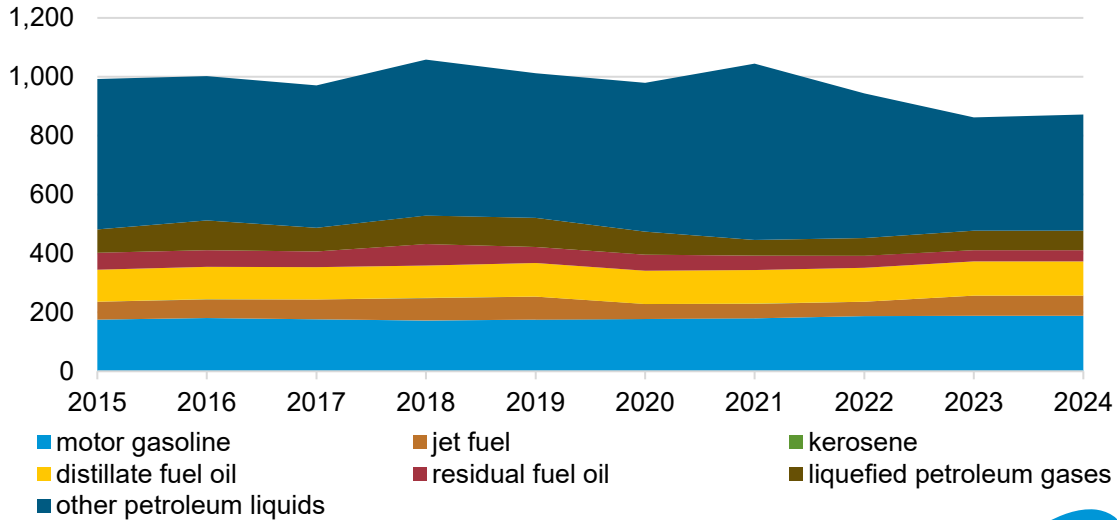
Source: U.S. Energy Information Administration and World Bank

## Petroleum and Other Liquids

- In 2024, Taiwan produced 25,000 barrels per day (b/d) of petroleum and other liquids, which came almost exclusively from refinery processing gains.<sup>7</sup> In 2024, Taiwan's Ministry of Economic Affairs estimated that the country had enough oil stockpiled to last 146 days.<sup>8</sup>
- Taiwan's petroleum and other liquids consumption was relatively flat in 2024 at 871,000 b/d. However, consumption has averaged around 974,000 b/d between 2015 and 2024.<sup>9</sup>
- Other petroleum products, which consists of products used in the industrial, petrochemical, and transportation sectors accounted for nearly half of Taiwan's total use of products in 2024 (Figure 2).<sup>10</sup>

**Figure 2. Taiwan's refined petroleum product consumption by type, 2015–2024**

thousand barrels per day



Data source: U.S. Energy Information Administration, International Energy Statistics



- Taiwan’s four refineries have a total nameplate capacity of 1.4 million b/d. In 2024, Taiwan’s refinery throughput averaged 783,000 b/d, a 7% decline from 2023.<sup>11</sup>
- Three of Taiwan’s airports will start using sustainable aviation fuel (SAF) with a target of at least 5% of total aviation fluid use on international flights by 2030.<sup>12</sup>

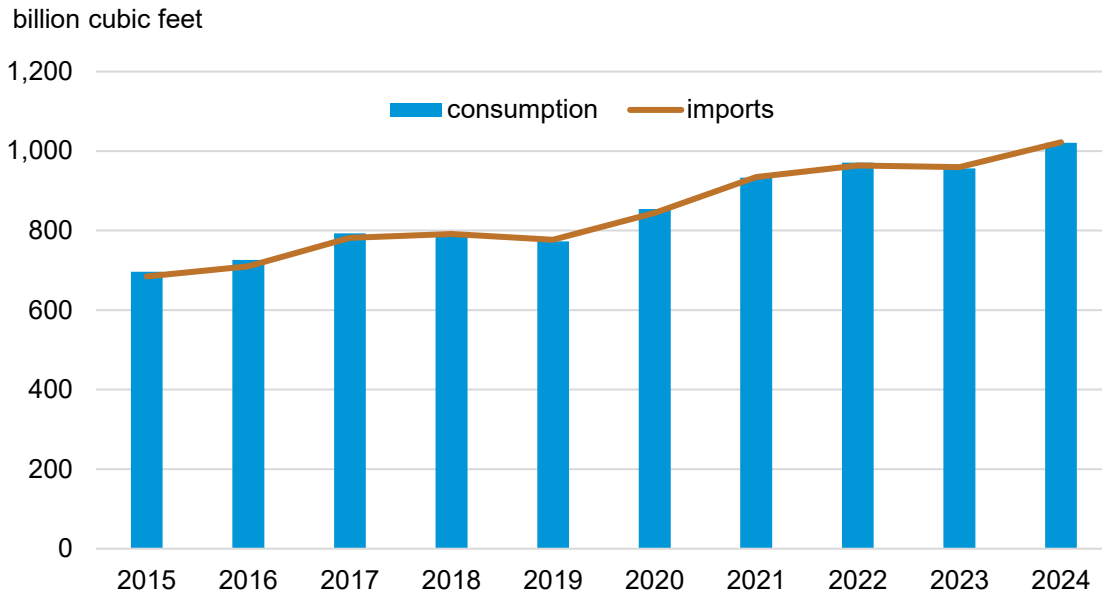
**Table 2. Refineries in Taiwan, 2025**

Location	Refinery	Crude oil distillation capacity (thousand barrels per day)	Start year
Pingtung	Kaohsiung	270	1971
Taoyuan	Taoyuan	200	1976
Chiayi	Dalin	400	1996
Yunlin	Mailiao	540	2000
<b>Total</b>		<b>1,410</b>	

Data source: BMI Fitch Solutions, Taiwan, China Oil and Gas Report, August 2025

Natural Gas

**Figure 3. Taiwan's natural gas consumption and imports, 2015–2024**



Data source: U.S. Energy Information Administration, International Energy Statistics



- Taiwan is almost completely dependent on imports to meet its domestic natural gas demand, as it only produced 2.1 billion cubic feet (Bcf) of natural gas in 2024. This amount is less than one-half percentage of the country’s total annual consumption of 1,021 Bcf in 2024. Consumption grew by nearly 60 Bcf, or 6%, from the previous year.<sup>13</sup>
- Taiwan mainly used natural gas for power generation (78%) and industrial use (15%) in 2024. Residential and energy sector use makes up most of the remaining 7%.<sup>14</sup>
- In 2026, the Ministry of Economic Affairs estimated that Taiwan’s stock of natural gas was enough to cover 10 to 11 days of use.<sup>15</sup>
- Taiwan has an estimated 56 trillion cubic feet (Tcf) of methane hydrate deposits located offshore.<sup>16</sup>

**Table 3. Liquefied natural gas regasification terminals operating in Taiwan, 2025**

Refinery	Capacity (billion cubic feet per year)	Start year
Taichung	293	2009
Yung-An	576	1990
Taoyuan	144	2025
<b>Total</b>	<b>1,013</b>	

Data source: GIIGNL, GIIGNL Annual Report 2025

**Table 4. Liquefied natural gas regasification terminals under development in Taiwan, 2025**

Terminal	Capacity (billion cubic feet per year)	Start year
Taichung (expansion)	216	2026
<b>Total</b>	<b>216</b>	

Data source: GIIGNL, GIIGNL Annual Report 2025

- Taiwan has three liquefied natural gas (LNG) regasification terminals (Table 3 and Figure 4), with a total capacity of 1,013 Bcf, through which it imports all of its LNG.<sup>17</sup>

Figure 4. Natural gas and crude oil infrastructure (2025)

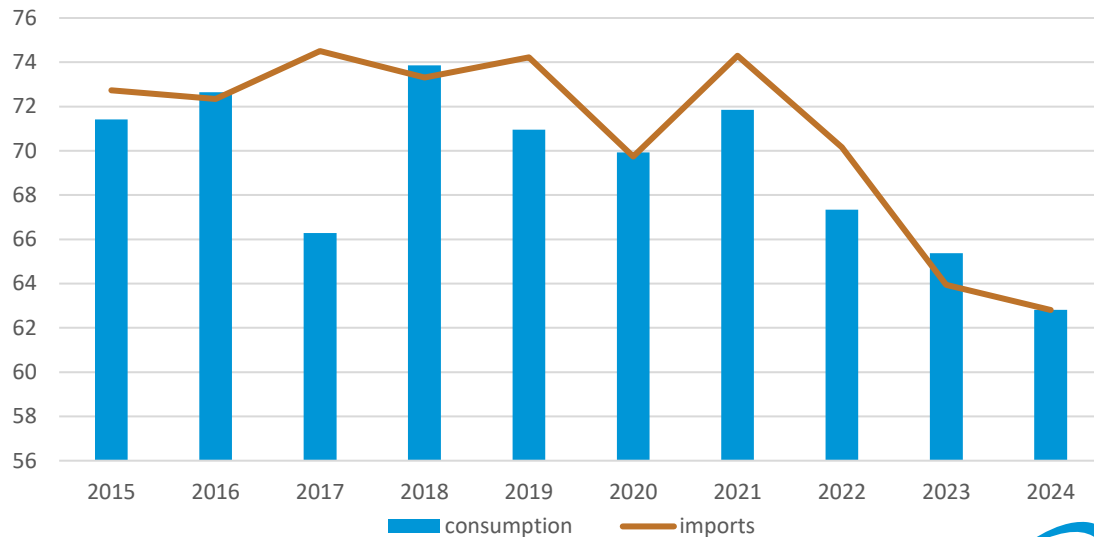


Source: U.S. Energy Information Administration, Global Energy Monitor, Global Gas Infrastructure Tracker, and World Bank  
Note: LNG=liquefied natural gas

## Coal

**Figure 5. Taiwan's coal consumption and imports, 2015–2024**

million short tons

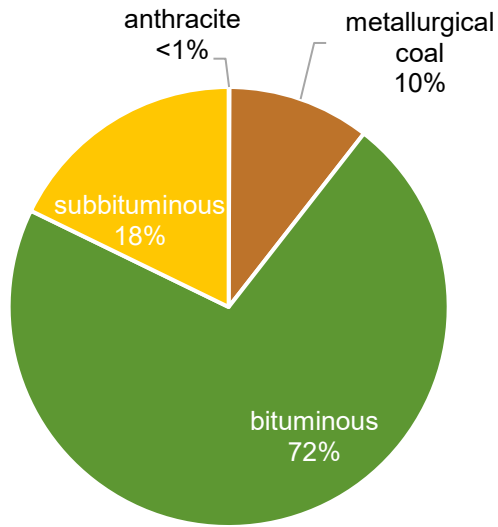


Data source: U.S. Energy Information Administration, International Energy Statistics



- Taiwan is completely dependent on imports to meet its domestic coal demand. Coal-fired power generation accounted for about 76% of coal use in 2024. Coke ovens, which are used in steel and iron production, accounted for 13% of demand.<sup>18</sup>
- Taiwan's Second Energy Transition Policy, released in 2024, targets reaching a generation mix of 50% natural gas, 30% renewable energy, and 20% coal by 2030. Coal's share of total generation was 40% in 2024.<sup>19</sup>
- Taiwan's coal consumption declined for its third straight year to 63 million short tons in 2024, a 4% decrease from the previous year (Figure 5). The decline reflects Taiwan's transition from coal-fired to natural gas-fired power generation.<sup>20</sup>
- Taichung, Taiwan's largest coal-fired power plant, with 5.5 gigawatts capacity, is slated to fully phase out coal by 2034. Natural gas units will come online in phases as coal units are shut down.<sup>21</sup>
- Taiwan consumes mostly bituminous coal, which accounted for 72% of demand in 2024 (Figure 6), followed by subbituminous (18%) and metallurgical coal (10%), roughly unchanged from 2023.<sup>22</sup>

Figure 6. Taiwan's coal consumption by type, 2024

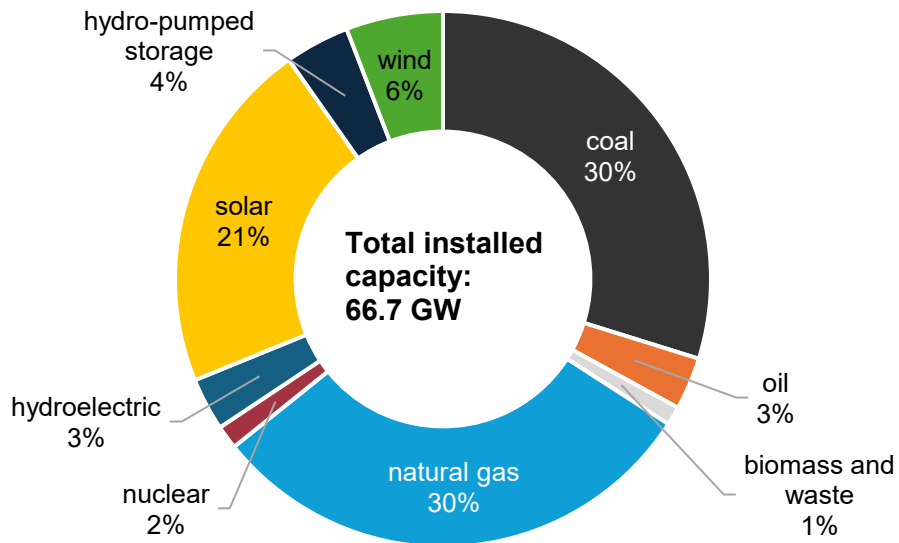


Data source: U.S. Energy Information Administration, International Energy Statistics  
Note: Numbers may not add up to 100% due to independent rounding.



## Electricity

Figure 7. Taiwan's total installed generation capacity by fuel type, 2024

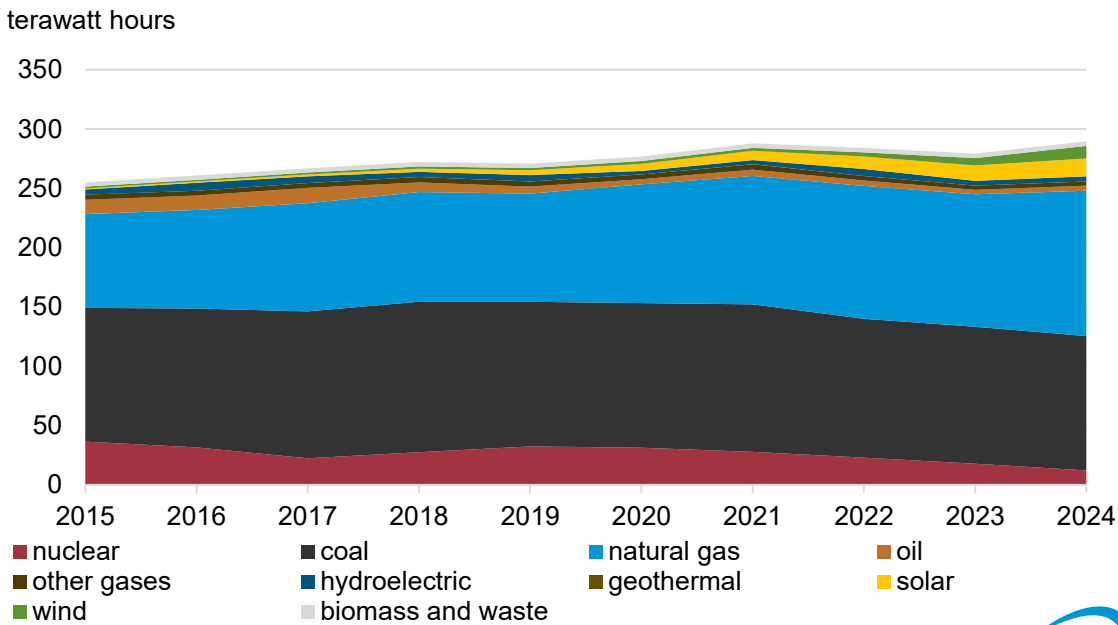


Data source: U.S. Energy Information Administration, International Energy Statistics  
Note: GW=gigawatts



- In 2024, Taiwan’s total installed generation capacity was 66.7 gigawatts (GW) (Figure 7).
- Fossil fuels accounted for 63% of Taiwan’s installed generation capacity in 2024 (Figure 7). The share of fossil fuels in the capacity mix declined by almost two percentage points less from a year earlier, due to the growing share of capacity from non-hydro renewables.<sup>23</sup>
- Most of Taiwan’s new generation capacity (85%) came from non-hydroelectric renewables in 2024. Solar added 1.9 GW of capacity, while wind capacity increased by 1.2 GW.<sup>24</sup>

**Figure 8. Taiwan’s electric generation by source, 2015–2024**



Data source: U.S. Energy Information Administration, International Energy Statistics

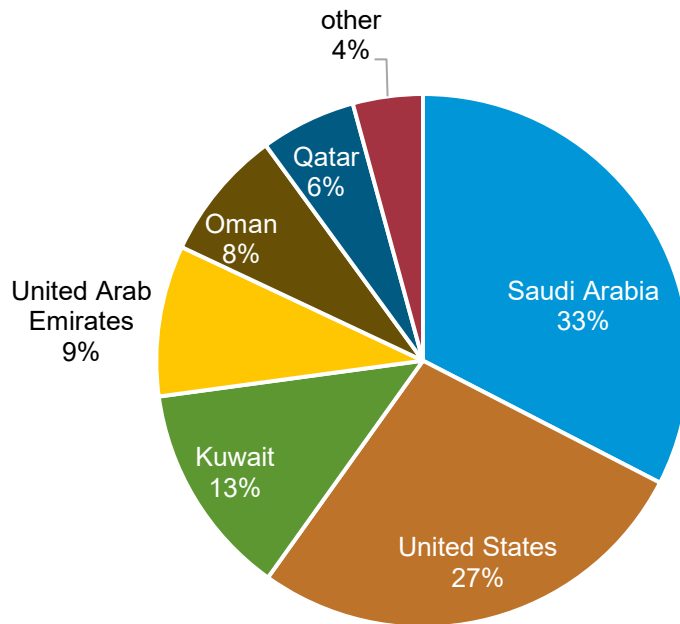


- Taiwan’s generation composition has changed significantly over the past few years due to the policy-driven transition away from coal and nuclear to natural gas and renewables. In 2021, nuclear power accounted for 10% of the country’s total electricity generation, and coal accounted for 43%. In 2024, the share of total generation from nuclear power declined to 4% and coal to 40%. Natural gas and non-hydro renewables accounted for 38% and 5% in 2021, increasing to 43% and 10%, respectively, in 2024 (Figure 7).<sup>25</sup>
- In 2024, Taiwan’s total electricity generation increased almost 3% to 286 terawatt-hours. Annual declines in generation from nuclear power (-32%) and coal (-2%) were offset by increases in natural gas (10%) and non-hydro renewables (30%).<sup>26</sup>
- Taiwan shut down its last nuclear power plant in early 2025. The closure fulfilled Taiwan’s policy goal of phasing out of nuclear power by 2025.<sup>27</sup>

## Energy Trade

### Petroleum and other liquids

Figure 9. Taiwan's crude and condensate imports by source, 2025

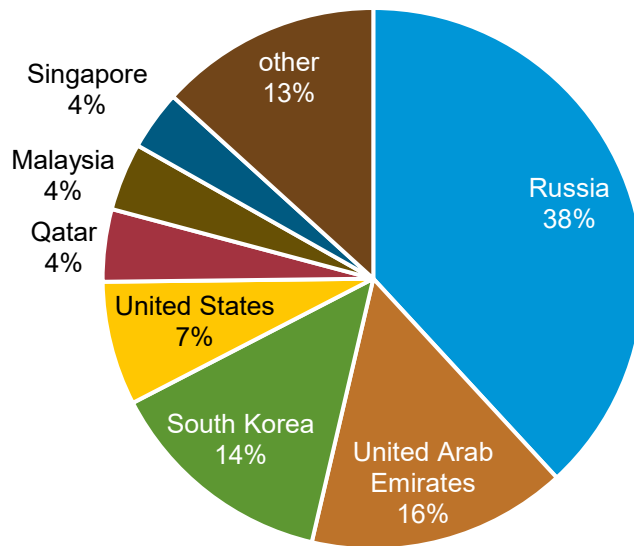


Data source: Vortexa



- In 2025, Taiwan imported 794,000 barrels per day (b/d) of crude oil and condensate, primarily from countries in the Middle East and the United States. This was an increase of 4% from the previous year (Figure 9).<sup>28</sup>
- Taiwan's crude oil imports come in through three ports: Mai Liao (55% in 2025), Kaohsiung (30% in 2025), and Shalung (15% in 2025).<sup>29</sup>

Figure 10. Taiwan's petroleum product imports by source, 2025

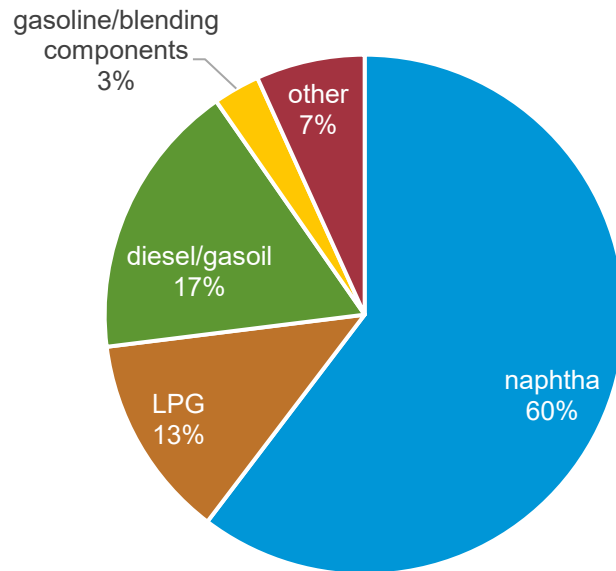


Data source: Vortexa



- Russia was the largest source of Taiwan’s petroleum product imports in 2025, accounting for a 38% share (Figure 10). Imports from Russia grew by 42% in 2025 from the previous year.<sup>30</sup>
- Taiwan imported approximately 293,000 b/d of petroleum product in 2025, a 6% increase from 2024. The increase was driven by higher imports of naphtha from Russia.<sup>31</sup>

**Figure 11. Taiwan's petroleum product imports by product type, 2025**

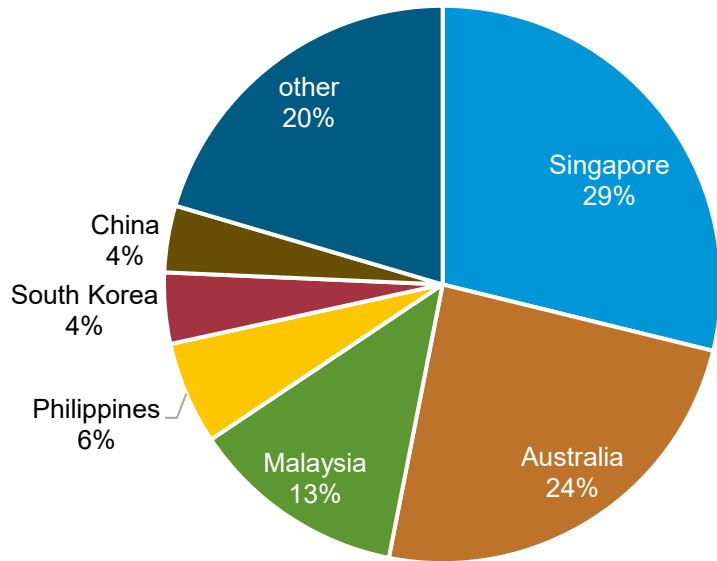


Data source: Vortexa



- In 2025, 60% of Taiwan’s petroleum product imports was naphtha (Figure 11), more than half of which came from Russia (49%) followed by the UAE (18%) and Qatar (6%). Naphtha is used as a feedstock in Taiwan’s petrochemical sector.<sup>32</sup>

**Figure 12. Taiwan's petroleum product exports by destination, 2025**

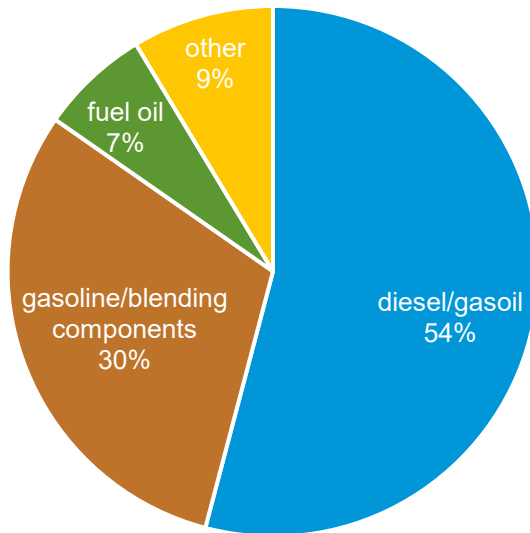


Data source: Vortexa



- Taiwan sends almost all of its petroleum product exports to the Asia and Oceania region (89%) (Figure 12).<sup>33</sup>
- Taiwan's petroleum product exports increased by 13% in 2025 from the previous year to 313,000 b/d. Increases in diesel (29,000 b/d), gasoline/blending components (13,000 b/d) and naphtha (4,600 b/d) represent most of the growth.<sup>34</sup>

Figure 13. Taiwan's petroleum product exports by type, 2025



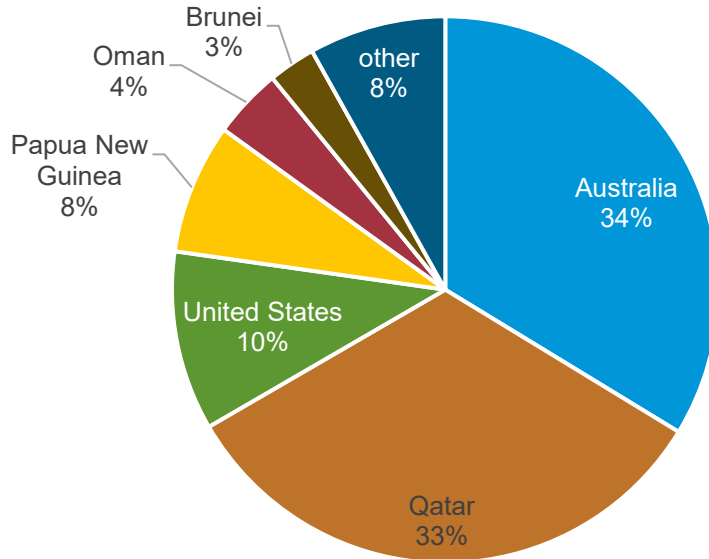
Data source: Vortexa



- Most of Taiwan's petroleum product exports (87%) consist of transportation fuels (Figure 13).<sup>35</sup>

## Liquefied natural gas

**Figure 14. Taiwan's liquefied natural gas imports by source, 2025**



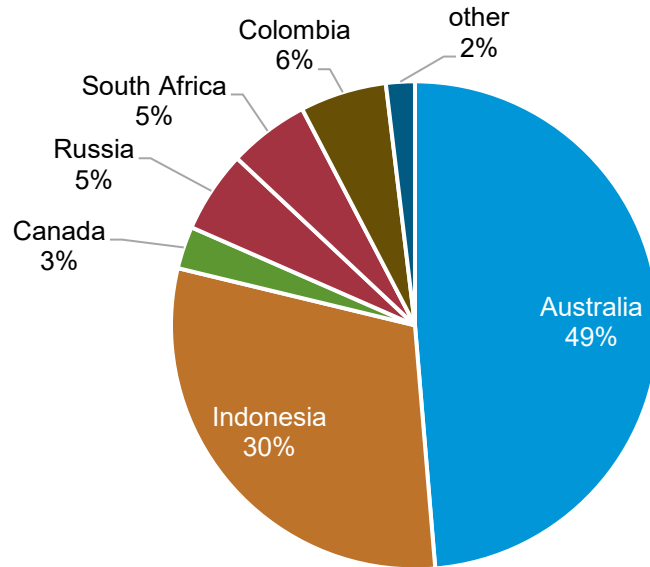
Data source: Vortexa



- In 2025, Taiwan's imports of liquefied natural gas (LNG) increased 10% from the previous year to over 1.1 trillion cubic feet (Tcf). The largest source of Taiwan's LNG imports was Australia, followed by Qatar and the United States (Figure 14).<sup>36</sup>
- . The largest year-on-year increase came from Qatar (124 Bcf, 49% growth) followed by Oman (34 Bcf, 258% growth) and the United States (16Bcf, 15% growth).<sup>37</sup>

## Coal

**Figure 15. Taiwan's coal imports by source, 2025**



Data source: Global Trade Tracker



- Most of Taiwan’s coal imports come from the Asia Pacific region (79%), with Australia (49%) as the largest supplier followed by Indonesia (30%) (Figure 15). Taiwan’s coal imports decreased by 6 million short tons in 2025 from the previous year.
- Imports from Russia, Taiwan’s fourth-largest source of coal, accounted for most of this year-on-year decrease (5.8 million short tons) in 2025.<sup>38</sup>

<sup>1</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.

<sup>2</sup> Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 3.

<sup>3</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.

<sup>4</sup> Pipe, Warwick. “[Reactor Closure Marks Taiwan’s Nuclear Exit.](#)” World Nuclear News, May 19, 2025.

<sup>5</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.

<sup>6</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.

<sup>7</sup> U.S. Energy Information Administration, International Energy Statistics.

<sup>8</sup> Yep, Eric. “[Taiwan Vulnerable to LNG Supply Risks in the Event of a Maritime Blockade.](#)” S&P Global Commodity Insights, May 30, 2024.

<sup>9</sup> U.S. Energy Information Administration, International Energy Statistics.

<sup>10</sup> U.S. Energy Information Administration, International Energy Statistics.

<sup>11</sup> Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 103.

<sup>12</sup> Shan, Shelley. “[Sustainable Flight Fuel Added at Taiwan’s Airports.](#)” Taipei Times, April 24, 2025.

<sup>13</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.

<sup>14</sup> Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 139.

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- <sup>15</sup> Yep, Eric. [“Taiwan Vulnerable to LNG Supply Risks in the Event of a Maritime Blockade.”](#) S&P Global Commodity Insights, May 30, 2024.
- <sup>16</sup> Chia-nan, Lin. [“Feature: Expert Urges Continued Research of Methane Hydrates.”](#) Taipei Times, July 23, 2018.
- <sup>17</sup> Vortexa (accessed October 2025)
- <sup>18</sup> Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 151.
- <sup>19</sup> U.S. Energy Information Administration, International Energy Statistics; [“Energy Transition Policy Direction Remains Unchanged with Diversified Deployment and Steady Promotion.”](#) Ministry of Economic Affairs, R.O.C., November 20, 2025.
- <sup>20</sup> U.S. Energy Information Administration, International Energy Statistics and estimates; [“Global and Taiwan Electricity and Renewable Energy Market 2024.”](#) PwC. Accessed October 20, 2025.
- <sup>21</sup> [“Taichung and HSINTA Units Operating in Full Compliance Taipower Holds Press Conference to Address Misinformation.”](#) Ministry of Economic Affairs, R.O.C., May 23, 2025; BMI FitchSolutions, [“Taiwan, China Power & Renewables Report, 2025,”](#) April 2025.
- <sup>22</sup> U.S. Energy Information Administration, International Energy Statistics.
- <sup>23</sup> U.S. Energy Information Administration, International Energy Statistics; Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 52.
- <sup>24</sup> U.S. Energy Information Administration, International Energy Statistics.
- <sup>25</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.
- <sup>26</sup> U.S. Energy Information Administration, International Energy Statistics and estimates.
- <sup>27</sup> Pipe, Warwick. [“Reactor Closure Marks Taiwan’s Nuclear Exit.”](#) World Nuclear News, May 19, 2025.
- <sup>28</sup> Vortexa (accessed October 2025)
- <sup>29</sup> Vortexa (accessed October 2025)
- <sup>30</sup> Vortexa (accessed October 2025)
- <sup>31</sup> Vortexa (accessed October 2025); 1. Luke Wickenden et al., [“Dangerous Dependence: Taiwan Becomes World’s Largest Importer of Russian Naphtha as Coal Imports Persist,”](#) Centre for Research on Energy and Clean Air, October 15, 2025.
- <sup>32</sup> Vortexa (accessed October 2025)
- <sup>33</sup> Vortexa (accessed October 2025)
- <sup>34</sup> Vortexa (accessed January 2026)
- <sup>35</sup> Vortexa (accessed October 2025)
- <sup>36</sup> Vortexa (accessed October 2025)
- <sup>37</sup> Vortexa (accessed October 2025); Taiwan Ministry of Economic Affairs, Energy Administration, Energy Statistics Handbook 2024, page 136.
- <sup>38</sup> Vortexa (accessed October 2025)