

Azerbaijan Oil and Gas Report Q2 2016

<https://marketpublishers.com/r/A78ABFF7C85EN.html>

Date: February 2016

Pages: 99

Price: US\$ 1,295.00 (Single User License)

ID: A78ABFF7C85EN

Abstracts

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BMI View: Our outlook on Azeri oil is heavily bearish, with the major ACG fields falling deeper into decline. Investments to stabilise output will help soften the fall; however, with a lack of new discoveries brought online this will be insufficient to reverse the overall trend. In contrast, we remain bullish on the prospects for Azeri gas, underpinned by large-scale new production from Shah Deniz. Prospects on the downstream remain poor, with ageing and low complexity infrastructure, a limited market for growth and weak prospects for investment.

Latest Updates and Key Forecasts:

The country boasts substantial, prospective and underexplored acreage, in particular offshore in the South Caspian basin. SOCAR has also announced plans to restart onshore exploration, targeting ultra-deep oil deposits.

A shortage of drilling rigs continues to delimit drilling activity in the Caspian Sea. A spate of exploration and appraisal, development and production wells are set to be spud between 2015 and 2017; SOCAR needs to secure additional drilling rigs in the coming quarters if it is to avoid the emergence of a major bottleneck in its upstream.

Contents

BMI Industry View

Table: Headline Forecasts (Azerbaijan 2014-2020)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Upstream Projects

Table: Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (Azerbaijan 2014-2019)

Table: Oil Production (Azerbaijan 2020-2025)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Oil Indexation In European Gas Contracts

Table: Gas Production (Azerbaijan 2014-2019)

Table: Gas Production (Azerbaijan 2020-2025)

Refining

Latest Updates

Structural Trends

Table: Refining Capacity and Refined Products Production (Azerbaijan 2014-2019)

Table: Refining Capacity and Refined Products Production (Azerbaijan 2020-2025)

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption* (Azerbaijan 2014-2019)

Table: Refined Products Consumption* (Azerbaijan 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Azerbaijan 2014-2019)

Table: Gas Consumption (Azerbaijan 2020-2025)

Trade - Oil

Latest Updates

Crude Oil Trade

Structural Trends

Table: Azerbaijan Crude Oil Assay

Table: Crude Oil Net Exports (Azerbaijan 2014-2020)

Table: Crude Oil Net Exports (Azerbaijan 2020-2025)

Refined Fuels Trade Forecast

Structural Trends

Table: Refined Fuels Net Exports (Azerbaijan 2014-2019)

Table: Refined Fuels Net Exports (Azerbaijan 2020-2025)

Trade - Gas (Pipeline and LNG)

Latest Updates

Structural Trends

Table: Gas Net Exports (Azerbaijan 2014-2019)

Table: Gas Net Exports (Azerbaijan 2020-2025)

Industry Risk Reward Ratings

Central And Eastern Europe Oil & Gas Risk/Reward Index

Table: CEE: High Risk, Low Reward

Table: CEE Upstream, Downstream And Overall Risk/Reward Index

Upstream: China Still The Target Market

Table: CEE Upstream Risk/Reward Index

Downstream: Turkish STAR Only Bright Spot In Weak Market

Table: CEE Downstream Risk/Reward Index

Azerbaijan - Risk/Reward Index

Market Overview

Azerbaijan Energy Market Overview

Regulatory Structure

Licensing Regime

Fiscal Regime

Table: Azerbaijan PSC Main Fiscal Terms

Oil & Gas Infrastructure

Refineries

Table: Azerbaijan - Main Refineries

Oil Pipelines

Table: Azerbaijan - Main Oil Pipelines

Gas Pipelines

Table: Azerbaijan - Main Gas Pipelines

Oil Terminals & Ports

Table: Azerbaijan - Main Oil Trade Facilities

Oil Storage Facilities

Table: Azerbaijan - Main Oil Storage Facilities

Gas Storage Facilities

Table: Azerbaijan - Main Gas Storage Facilities

Competitive Landscape

Competitive Landscape Summary

Table: Key Domestic And Foreign Companies

Table: Key Upstream Players

Table: Key Downstream Players

Company Profile

BP Azerbaijan

Lukoil Azerbaijan

SOCAR

Statoil

Other Summaries

Regional Overview

Central And Eastern Europe Oil & Gas Regional Overview

Oil Production: Output Growth Stalling

Oil Consumption: Weak EM Growth Softens Demand

Refining Capacity: Modernisation Over Capacity Growth

Natural Gas Production: Gas Ramp-Up Depends On China's Hunger

Table: Central Asia-China Gas Pipeline Expansions

Gas Consumption: Demand Falters On Struggling Economies

Table: Central & Eastern Europe - Oil & Gas Production & Consumption, Refining

Capacity & Trade

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Source

Risk/Reward Index Methodology

Table: Bmi's Oil & Gas Upstream Risk/Reward Index

Table: Weighting

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