

Czech Republic Oil and Gas Report Q2 2016

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Abstracts

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BMI View: The Czech Republic will remain highly dependent on imported oil and gas, mostly from Russia, as conventional hydrocarbons production potential is limited. However the country will manage to slowly diversify its gas sources through the STORK II project linking the country to Poland. This will provide it with access to Polish gas and imported LNG from the ?winouj?cie LNG terminal.

The main trends and developments we highlight for the Czech Republic's oil and gas sector are:

While the country's shale gas potential could be promising, a moratorium on shale gas exploration and public opposition to the practice make exploration unlikely in the near-to-medium term.

The Czech Republic produces negligible volumes of domestic gas or oil, with limited upside risk to future production, meaning the country will remain significantly dependent on Russian hydrocarbon imports within our forecast period.

The country is a small consumer of refined fuels. We forecast a relatively strong rise in refined fuels consumption over the first half of our forecast period, pulled up by the robust growth in vehicle growth and a strong industrial sector.

The country imports most of its required crude oil from Russia and is a small net importer of refined products. We expect the Czech Republic will continue to be largely dependent on Russian crude imports, while the country will see an increase in refined products net import requirements to answer rising domestic

demand over our forecast period.

According to an update by Unipetrol in late 2015, current production at the Litvínov refinery continues running at a significantly reduced capacity following an explosion at the neighbouring petrochemical complex in August 2015. A return to full production is unlikely until Q316. This has therefore likely impacted H215 refined fuels production and will likely impact 2016 production. We therefore point to downside risk to our 2015 refined fuels production estimate and to our 2016 forecast. Similarly, this yields upside risk to refined fuel net imports for 2015 and 2016, and downside risks to net crude oil imports on the back of lower crude oil feedthrough.

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