

# Czech Republic Oil and Gas Report Q3 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 liquefied natural gas (LNG) terminal.

### Latest Updates and Key Forecasts

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.

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 before 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 feed through.

## Contents

### BMI Industry View

Table: Headline Forecasts (Czech Republic 2014-2020)

### SWOT

### Oil & Gas SWOT

### Industry Forecast

### Upstream Exploration

### Latest Updates

### Structural Trends

### Upstream Production - Oil

Table: Oil Production (Czech Republic 2014-2019)

Table: Oil Production (Czech Republic 2020-2025)

### Upstream Production - Gas

Table: Gas Production (Czech Republic 2014-2019)

Table: Gas Production (Czech Republic 2020-2025)

### Refining

### Latest Updates

### Structural Trends

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

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

### Refined Fuels Consumption

### Latest Updates

### Structural Trends

Table: Refined Products Consumption\* (Czech Republic 2014-2019)

Table: Refined Products Consumption\* (Czech Republic 2020-2025)

### Gas Consumption

### Latest Updates

### Structural Trends

Table: Gas Consumption (Czech Republic 2014-2019)

Table: Gas Consumption (Czech Republic 2020-2025)

### Trade - Oil

### Crude Trade Forecast

### Latest Updates

### Structural Trends

Table: Crude Oil Net Exports (Czech Republic 2014-2020)

Table: Crude Oil Net Exports (Czech Republic 2020-2025)

## Refined Fuels Trade Forecast

### Latest Updates

### Structural Trends

Table: Refined Fuels Net Exports (Czech Republic 2014-2019)

Table: Refined Fuels Net Exports (Czech Republic 2020-2025)

## Trade - Gas (Pipeline and LNG)

### Latest Updates

### Structural Trends

Table: Gas Net Exports (Czech Republic 2014-2019)

Table: Gas Net Exports (Czech Republic 2020-2025)

## Industry Risk Reward Index

### 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

## Czech Republic - Risk/Reward Index

### Upstream Index - Overview

### Upstream Index - Rewards

### Upstream Index - Risks

### Downstream Index - Overview

### Market Overview

### Energy Market Overview

### Regulatory Structure

### Upstream Fiscal And Licensing Regime

### Operational Environment

### Political Environment

### Oil & Gas Infrastructure

### Oil Refineries

Table: Refineries In Czech Republic

### Service Stations

### Oil Storage Facilities

### Oil Pipeline

### Gas Storage Facilities

### Gas Pipelines

### Competitive Landscape

### Competitive Landscape Summary

Table: Key Players - Czech Oil And Gas Sector

Table: Key Upstream Player

Table: Key Downstream Players

Regional Overview

Central And Eastern Europe Oil & Gas Regional Overview

Oil Production: Oil Powerhouses Falter On Weak Prices

Oil Consumption: Short-Term Weakness As Russia Struggles

Refining Capacity: Modernisation Key To Competing

Natural Gas Production: Gas Ramp-Up Demand Dependent

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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