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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.

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> 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.

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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.

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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)

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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

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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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