

Germany Oil and Gas Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Domestic oil and gas production will continue to decline as weak oil prices hold back investment. The refining sector will struggle to improve on a strong 2015 with limited growth potential in long-term fuels consumption.

The main trends and developments in Germany's oil and gas sector are:

Refined products production increase 2% in 2015, with stronger diesel and jet fuel output.

Refined fuel demand remained flat y-o-y in 2015 at 2.5mn barrels per day (b/d).

Gasoline consumption remains in a downtrend, though diesel and jet fuel consumption increased.

Gas production saw a heavy drop in 2015 falling over 25% to 7.6bn cubic metres (bcm).

Gas consumption increased slightly to 83.0bcm, around a 2.1% y-o-y increase.

Cheaper natural gas prices have moved spark-spreads into positive territory in late 2015, offering potential gas consumption upside from the power sector going into 2016.

Crude and condensate production remained flat y-o-y at 48,000b/d, though remains negligible in a 2.5mn b/d consumption market.

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