

Germany Oil and Gas Report Q3 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. Softer margins in H216 will see the refining sector struggle to improve on a strong 2015. Fuels consumption in Europe's largest market remains flat and will trend down.

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

Refined products production remained flat y-o-y over Q116. Gasoline output increased on the back of stronger margins.

Refined fuel demand remained flat y-o-y in Q116, with dropping gasoline consumption displaced by an uptick in diesel.

Gas production continues its production downtrend of around 6-7% per year.

Oil production remains surprisingly resilient with infill drilling and workovers supporting output.

Over early 2016, five rigs were drilling new prospects, while eight were operating on workover activity. All were located onshore.

Gas consumption increased slightly to 79.9bcm in 2015, though new demand will be limited.

H116 gas imports were weak as purchasers await low oil prices to feed through into Russian gas contracts. We expect increased imports over H216.

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