

Greece Oil and Gas Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Gas midstream and the downstream segments are the bright spots in Greece's O&G landscape, with upstream on the whole languishing in the background. EU funds are backing some trans-national gas projects (the Gas Interconnector Greece-Bulgaria pipeline, the Trans Adriatic Pipeline), which in turn will give impetus to the domestic gas infrastructure market development in the coming years. Downstream leads Greece's exports income with record profits for domestic refiners, though the windfalls may prove to be short-lived as the European fuels demand slows.

Latest Updates and Key Forecasts

We have revised our forecasts downwards for natural gas consumption as latest data show demand destruction has been greater than before. We forecast natural gas consumption of 2.5bcm in 2016.

The traction in the Trans Adriatic Pipeline (TAP) and the Gas Interconnector Greece-Bulgaria (IGB) pipeline projects in October and November raises the scope for gas midstream to see accelerated development in the coming years.

Liquefied natural gas (LNG) imports will remain the smallest part of the gas import mix in Greece through our forecast period as contracted pipeline gas deliveries will be more than enough to meet domestic gas needs.

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