

Greece Oil and Gas Report Q3 2016

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Abstracts

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BMI View: The start of construction work on the Trans Adriatic Pipeline (TAP) marks a milestone for the Greek midstream sector and our outlook for its natural gas sector. We reiterate our view that natural gas, especially midstream, will be the largest growth opportunity in the Greek energy space with TAP beginning construction in June and DEPA focusing on growing the domestic gas market infrastructure. However, tax hikes on gas consumption for large industrial users will temper demand, which is presenting a downside risk to our natural gas consumption forecasts.

Latest Updates and Key Forecasts

Refined fuels exports from Greece will remain the country's largest export by a wide margin and will increase in 2016 by 4.3% according to our forecasts as margins for refiners remain very healthy but the domestic market depresses further, leaving more available for exports.

The TAP natural gas pipeline began construction in May 2016, with two consortiums one led by J&P Avax and the other by ELLAKTOR winning the EPC contracts for the Greek section of the pipeline works.

First shipment of privately contracted gas via the national pipeline network took place in June 2016. This marked a new phase for the retail natural gas market in Greece, which is overwhelmingly dominated by the Public Gas Corporation (DEPA). M+M reportedly imported natural gas through the border metering station at Sidirokastro, which links into the Bulgarian gas transmission network.

Privatisations of state energy assets are firmly (again) back on the agenda,

following the passing of legislation from Parliament establishing, inter alia, a mega-privatisation fund. It will be made up of four subsidiaries: the Hellenic Republic Asset Development Fund, the Hellenic Financial Stability Fund, the newly-established Public Participations Corporation, and the Public Real Estate Corporation. ELPE, DEPA, DESFA, and PPC are all in line for divestments of the state's stakes, partial or total.

Contents

BMI Industry View

Table: Headline Forecasts (Greece 2014-2020)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Upstream Projects

Table: Greece - Key Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Energean Production Timeline

Table: Oil Production (Greece 2014-2019)

Table: Oil Production (Greece 2020-2025)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (Greece 2014-2019)

Table: Gas Production (Greece 2020-2025)

Refining

Latest Updates

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (Greece 2014-2019)

Table: Refined Products Consumption (Greece 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: List of Gas-Fired Power Plants in Greece

Table: Gas Consumption (Greece 2014-2019)

Table: Gas Consumption (Greece 2020-2025)

Trade - Oil

Crude Oil Trade Forecasts

Latest Updates

Structural Trends

Table: Crude Oil Net Exports (Greece 2014-2019)

Table: Crude Oil Net Exports (Greece 2020-2025)

Fuel Trade Forecasts

Latest Updates

Structural Trends

Table: Refined Fuels Net Exports (Greece 2014-2019)

Table: Refined Fuels Net Exports (Greece 2020-2025)

Trade - Gas (Pipeline And LNG)

Latest Updates

Structural Trends

Table: Gas Net Exports (Greece 2014-2019)

Table: Gas Net Exports (Greece 2020-2025)

Industry Risk/Reward Index

North America And Western Europe Oil & Gas Risk/Reward Index

Table: North America & Western Europe Oil & Gas Risk/Reward Index

Upstream Rankings: North America To Maintain The Lead

North America: US Unconventional Production Leads Decline

Western Europe Languishes In Maturing Assets

Table: North America & Western Europe Upstream Risk/Reward Index, out of
Downstream Rankings: US Widens Its Lead

Table: North America & Western Europe Downstream Risk/Reward Index

Greece - Risk/Reward Index

Market Overview

Energy Market Overview

Regulatory Structure

Fiscal Regime

Table: Greece- Upstream Tax Regime

Licensing Regime

Table: Greece - Contracts and Licensing Regime

Licensing Rounds

Table: Greece - Completed and Ongoing Upstream Licensing Rounds

Exclusive Economic Zone

Oil And Gas Infrastructure

Oil Refineries

Table: Oil Refineries In Greece

Oil Storage Facilities

Oil Terminals/Ports

Table: Greece - Oil Terminals & Ports

LNG Terminals

Table: Greece - Existing and Planned LNG Terminals

Gas Storage Terminals

Table: Greece - Gas Storage Terminals

Gas Pipelines

Table: Greece - Natural Gas Pipelines

Crude Oil Pipelines

Table: Greece - Crude Oil Pipelines

Company Profile

Hellenic Petroleum

Latest Updates

Table: Major Downstream Assets in Greece

Table: Major Upstream Assets in Greece

Table: Key Financial Data, EURmn

Energiean Oil & Gas

Latest Updates

Table: Major Upstream Assets

Regional Overview

North America And Western Europe Oil And Gas Regional Overview

Table: North America - Key Regional Indicators, 2014-2025

Table: Western Europe - Key Regional Indicators, 2014-2025

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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