

Hong Kong Oil and Gas Report Q1 2016

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Abstracts

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BMI View: With no domestic energy resources, Hong Kong will be required to meet growing oil and gas demand through imports alone. As a positive development for the market, the decline in crude and refined product prices and the weaker oil price environment over our forecast period will see Hong Kong's net oil import bill substantially reduced over the short and medium term. While Hong Kong can ostensibly fall back on China in order to fulfil its energy needs, there is some resistance to an overreliance on its parent state from both private and public entities. Still, as Hong Kong becomes increasingly politically intertwined with Beijing, so too will its energy policy. The city-state is increasingly likely to turn to the mainland to achieve its goal of curbing its reliance on thermal energy over the coming years.

Latest Updates And Key Forecasts

The strong GDP growth, population growth and vehicle fleet growth will see refined fuels consumption increase strongly and steadily over our forecast period, despite improvements in transport energy efficiency.

Hong Kong imports all of its refined fuels as it lacks a refining capacity. It is highly dependent on Chinese refined fuels. Net imports are expected to rise strongly in line with growing domestic demand over the medium term. Nevertheless, the lower oil price environment will keep Hong Kong' refined fuel import bill significantly lower than in the past years, despite the strong increase in overall fuel imports.

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