

Hong Kong Oil and Gas Report Q3 2016

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Abstracts

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BMI View: Plans for a LNG import terminal will pose upside risk to Hong Kong's rising natural gas consumption. Increases in vehicle population and air traffic will sustain the uptrend in Hong Kong's refined fuels demand, although growth will remain stunted until 2016, due to a weaker economic outlook.

Latest Updates And Key Forecasts

CLP Power's plan to build Hong Kong's first LNG import terminal will complement the city's piped gas imports from mainland China, posing upside risks to our gas consumption forecast for Hong Kong.

The project will give the government flexibility to aggressively increase the share of natural gas in the energy mix in an economical way and also allow for supply diversification.

Hong Kong's near-term demand for refined fuels will remain stunted due to a weaker economic outlook over 2014-2016. Increases in vehicle population and air traffic will sustain the uptrend in refined fuels demand.

Costlier vehicle financing, a cooling property market and the slowing Chinese economy pose downside risks to our forecast. These factors may dampen the demand for new vehicles and air travel, thereby weakening demand for refined fuels.

Over the longer term, policies that encourage purchase of cleaner and more fuel efficient vehicles will moderate the increase in refined fuel demand beyond

2020. For instance, the number of electric vehicles on the roads has grown exponentially due to financial incentives and rapid deployment of charging infrastructure.

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