

Pakistan Oil and Gas Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: While a string of recent exploration successes boosted Pakistan's oil and gas in the past few years, we forecast the country's reserves to continue declining over the next decade due to excessive use and lack of new significant discoveries. Nonetheless, recent discoveries and greater private sector involvement in the upstream sector pose an upside risk to our forecast and could stimulate much needed investment, thus helping the country temper or reverse the negative trend.

Latest Updates and Key Forecasts:

Rostec's plan to build a USD2.5bn gas pipeline in Pakistan from Lahore to Karachi will improve domestic pipeline connectivity, which supports our forecasts for domestic gas demand to grow steadily over the next 10 years.

On September 1 2015, the Pakistani government increased the price of natural gas for domestic customers and industry. We believe that higher domestic gas prices in Pakistan will invite greater international investment in its E&P sector and pose an upside risk to the country's long-term gas production growth and minimise the cost burden of LNG imports on the government.

Completion of the Baluchistan Oil Refinery has boosted Pakistan's refining capacity to 402,000b/d in 2015.

Contents

BMI Industry View

Table: Headline Forecasts (Pakistan 2013-2019)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Upstream Projects

Table: Pakistan Major Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (Pakistan 2013-2018)

Table: Oil Production (Pakistan 2019-2024)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (Pakistan 2013-2018)

Table: Gas Production (Pakistan 2019-2024)

Refining

Latest Updates

Structural Trends

Table: Refining Capacity and Refined Products Production (Pakistan 2013-2018)

Table: Refining Capacity and Refined Products Production (Pakistan 2019-2024)

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption* (Pakistan 2013-2018)

Table: Refined Products Consumption* (Pakistan 2019-2024)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Pakistan 2013-2018)

Table: Gas Consumption (Pakistan 2019-2024)

Trade - Oil

Crude Oil Trade Forecasts

Latest Updates

Structural Trends

Table: Crude Oil Net Exports (Pakistan 2013-2019)

Table: Crude Oil Net Exports (Pakistan 2019-2024)

Fuels Trade Forecast

Latest Updates

Structural Trends

Table: Refined Fuels Net Exports (Pakistan 2013-2018)

Table: Refined Fuels Net Exports (Pakistan 2019-2024)

Trade - Gas (Pipeline and LNG)

Latest Updates

Structural Trends

Table: Gas Net Exports (Pakistan 2013-2018)

Table: Gas Net Exports (Pakistan 2019-2024)

Industry Risk Reward Ratings

Industry Risk Reward Index

Table: Asia: Upstream Risk/Reward Index

Table: Asia: Downstream Risk/Reward Index

Pakistan Risk/Reward Index

Market Overview

Pakistan Energy Market Overview

Regulatory Structure

Fiscal Regime

Table: Pakistan - Upstream Tax Regime

Licensing Regime

Table: Pakistan - Contracts and Licensing Regime

Licensing Rounds

Oil And Gas Infrastructure

Oil Refineries

Table: Refineries In Pakistan

Oil Storage Facilities

Oil Terminals/Ports

Oil Pipelines

LNG Terminals

Competitive Landscape

Competitive Landscape Summary

Table: Key Players - Pakistan Oil & Gas Sector

Company Profile

Oil and Gas Development Company (OGDCL)

Pakistan Petroleum (PPL)

Pakistan State Oil (PSO)

Pakistan Oilfields

Shell Pakistan

Other Summaries

Regional Overview

Asia - Weak Oil Prices Will Hit Region's Long-Term O&G Production

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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