

Poland Oil and Gas Report Q3 2016

<https://marketpublishers.com/r/P9C46DE6279EN.html>

Date: June 2016

Pages: 101

Price: US\$ 1,295.00 (Single User License)

ID: P9C46DE6279EN

Abstracts

Includes 3 FREE quarterly updates

BMI View: We have recently downgraded Poland's long-term gas production outlook, removing any contribution in growth from shale gas. The slow pace of exploration is unlikely to pick up in the coming years, tempering the development of below-ground understanding and optimised drilling and hydraulic fracturing processes required for Poland's challenging geology. Conventional gas exploration and developments will slowly boost gas production over our forecast period.

The main trends and developments we highlight for Poland's oil and gas sector are:

We have downgraded Poland's long-term gas production outlook, removing any contribution in growth from shale gas. Exploration for unconventional gas in Poland has come to a near standstill and is unlikely to pick up within the next few years. Only four shale gas exploration wells have been drilled in 2015, down from a high of 24 wells in 2012 and bringing the total number of shale gas exploration well in Poland to 72 wells since 2010.

Highlighting the continued morose exploration scene, PGNiG announced in May 2016 it will end exploration for shale gas if a 'last chance' well does not yield promising results in June. This would be a death blow to shale exploration efforts in Poland (at least for the coming years) given PGNiG is the last large company still exploring for shale gas in Poland.

While we no longer include shale gas production in our Poland gas production forecast, we continue to highlight the potential of conventional gas exploration and the role it has in boosting Poland's output, as highlighted by San Leon's recent Rawicz discovery, to be developed within the next one to two years.

Conventional developments in Poland will very slowly increase Poland's gas production over our forecast period.

We maintain our low gas consumption growth forecast for Poland, as we become increasingly bearish on the country's switch to gas in the power sector. Concern about energy security, the unlikelihood of domestic shale gas production within our forecast period and concerns of rising electricity bills provide little incentive for phasing out cheap coal-fired power generation and a switch to gas-powered generation.

Contents

BMI Industry View

Table: Headline Forecasts (Poland 2014-2020)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Oil

Gas

Shale Exploration Grinds To A Halt

Table: Poland Shale Gas Exploration Licences

Upstream Projects

Table: Poland - Major Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (Poland 2014-2019)

Table: Oil Production (Poland 2020-2025)

Upstream Production - Gas

Latest Updates

Structural Trend

Table: Gas Production (Poland 2014-2019)

Table: Gas Production (Poland 2020-2025)

Refining

Latest Updates

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (Poland 2014-2019)

Table: Refined Products Consumption (Poland 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Poland 2014-2019)

Table: Gas Consumption (Poland 2020-2025)

Trade - Oil

Crude Oil

Latest Updates

Structural Trends

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

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

Refined Fuels

Latest Updates

Structural Trends

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

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

Trade - Gas (Pipeline And LNG)

Latest Updates

Structural Trends

Table: Poland - Alternatives To Direct Russian Imports Over Coming Years

Table: Gas Net Exports (Poland 2014-2019)

Table: Gas Net Exports (Poland 2020-2025)

Industry Risk Reward Ratings

Central And Eastern Europe Oil & Gas Risk/Reward Index

Table: CEE: High Risk, Low Reward

Table: CEE Upstream, Downstream And Overall Risk/Reward Index

Upstream: China Still The Target Market

Table: CEE Upstream Risk/Reward Index

Downstream: Turkish STAR Only Bright Spot In Weak Market

Table: CEE Downstream Risk/Reward Index

Poland - Risk/Reward Index

Poland Upstream Index - Rewards

Poland Upstream Index - Risks

Poland Downstream Index - Overview

Market Overview

Poland Energy Market Overview

Overview/State Role

Fiscal And Licensing Regime Up To 2016

Table: Poland Fiscal and Licensing Regime

Shale Gas Licensing, Regulation And Taxation

Licensing Rounds

Oil And Gas Infrastructure

Oil Refineries

Table: Downstream Projects

Service Stations

Oil Terminals/Ports

Oil Pipelines

LNG Terminals

Gas Storage Facilities

Table: Gas Storage Facilities In Poland

Gas Pipelines

Competitive Landscape

Competitive Landscape Summary

Table: Key Players - Poland Oil And Gas Sector

Table: Key Upstream Player

Table: Key Downstream Players

Company Profile

PKN Orlen

Company Overview

Latest Company Updates

Table: Major Downstream Assets in Poland

Table: Key Financial Data (PLNmn)

Grupa Lotos

Company Overview

Latest Company Updates

Table: Major Downstream Asset in Poland

Table: Key Financial Data ('000PLN)

PGNiG

Company Overview

Latest Updates

Table: Major Upstream Assets in Poland

Regional Overview

Central And Eastern Europe Oil & Gas Regional Overview

Oil Production: Oil Powerhouses Falter On Weak Prices

Oil Consumption: Short-Term Weakness As Russia Struggles

Refining Capacity: Modernisation Key To Competing

Natural Gas Production: Gas Ramp-Up Demand Dependent

Table: Central Asia-China Gas Pipeline Expansions

Gas Consumption: Demand Falters On Struggling Economies

Table: Central & Eastern Europe Oil & Gas Production & Consumption, Refining Capacity & Trade

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

I would like to order

Product name: Poland Oil and Gas Report Q3 2016

Product link: <https://marketpublishers.com/r/P9C46DE6279EN.html>

Price: US\$ 1,295.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/P9C46DE6279EN.html>