

Slovakia Oil and Gas Report Q2 2016

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Abstracts

BMI View: Slovakia has above-average energy import dependency compared with the regional average. The country remains reliant on Russia, but is actively pushing through several projects aimed at improving bi-directional flows and establishing regional links for a regional gas market in Central and South East Europe.

Key Trends And Developments

Slovakia is almost entirely dependent on Russian oil and gas imports for its domestic consumption, with a total hydrocarbon import bill estimated at USD1.98bn in 2015, a strong decline on 2014 thanks to the fall in oil and gas prices. There is little prospect for an increase in oil or gas production.

While we expect the 130,000b/d Bratislava refinery will continue to run at high utilisation rates, downside risk to refined fuels production exists, given the difficult context for European refiners as a whole. However, the refinery's focus on diesel production could partially shield it from the negative effect of increased gasoline production in the US. The country will remain a small net refined fuels exporter throughout our forecast period.

Gas consumption in Slovakia will stagnate, with a residential gas market close to saturation and no expansion planned in the already limited gas-fired power generation capacity.

Contents

BMI Industry View

Table: Headline Forecasts (Slovakia 2014-2020)

SWOT

Industry Forecast

Upstream Exploration

Table: Proven Oil and Gas Reserves (Slovakia 2014-2019)

Table: Proven Oil and Gas Reserves (Slovakia 2020-2025)

Upstream Production - Oil

Table: Oil Production (Slovakia 2014-2019)

Table: Oil Production (Slovakia 2020-2025)

Upstream Production - Gas

Table: Gas Production (Slovakia 2014-2019)

Table: Gas Production (Slovakia 2020-2025)

Refining

Latest Updates

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (Slovakia 2014-2019)

Table: Refined Products Consumption (Slovakia 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Slovakia 2014-2019)

Table: Gas Consumption (Slovakia 2020-2025)

Trade - Oil

Crude Oil Trade Forecast

Latest Updates

Structural Trends

Table: Crude Oil Net Exports (Slovakia 2014-2020)

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

Refined Products Trade Forecast

Latest Updates

Structural Trends

- Table: Refined Fuels Net Exports (Slovakia 2014-2019)
- Table: Refined Fuels Net Exports (Slovakia 2020-2025)
- Trade - Gas (Pipeline And LNG)
- Latest Updates
- Structural Trends
 - Table: Gas Net Exports (Slovakia 2014-2019)
 - Table: Gas Net Exports (Slovakia 2020-2025)
- Industry Risk Reward Index
 - Central And Eastern Europe - Oil & Gas Risk/Reward Index
 - Table: Regional Risk/Reward Index Averages - High Risk, Low Reward In Central And Eastern Europe
 - Table: Central And Eastern Europe - Upstream, Downstream And Overall Risk/Reward Index
 - Upstream: China Still The Target Market
 - Table: Central And Eastern Europe Upstream Risk/Reward Index
 - Downstream: Turkish STAR Only Bright Spot In Weak Market
 - Table: Central And Eastern Europe - Downstream Risk/Reward Index
- Slovakia - Risk/Reward Index
- Slovakia Upstream Index - Rewards
- Slovakia Upstream Index - Risks
- Slovakia Downstream Index - Overview
- Market Overview
 - Slovakia Energy Market Overview
 - Oil And Gas Infrastructure
 - Oil Refineries
 - Table: Refineries In Slovakia
 - Service Stations
 - Oil Storage Facilities
 - Oil Pipelines
 - Gas Storage Facilities
 - Gas Pipelines
 - Competitive Landscape
 - Competitive Landscape Summary
 - Table: Key Players - Slovak Oil And Gas Sector
 - Table: Key Downstream Players
- Company Profile
 - OMV
 - Slovnaft
- Other Summaries

Regional Overview

Central And Eastern Europe Oil And Gas Regional Overview

Oil Production: Output Growth Stalling

Oil Consumption: Weak EM Growth Softens Demand

Refining Capacity: Modernisation Over Capacity Growth

Natural Gas Production: Gas Ramp-Up Depends On China's Hunger

Table: Central Asia-China Gas Pipeline Expansions

Gas Consumption: Demand Falters On Struggling Economies

Table: Central And Eastern Europe - Oil And Gas Production And Consumption,
Refining Capacity And 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

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