

Slovakia Oil and Gas Report Q4 2016

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Abstracts

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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 USD1.9bn 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.

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