

South Africa Oil and Gas Report Q3 2016

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Abstracts

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BMI View: Major planned overhauls of the country's regulatory and fiscal regimes are a broad positive for the South African oil and gas sector. However, the pace of reform will likely remain slow and we see limited upside to the upstream sector over the short to medium term. As such, and despite relatively moderate oil consumption growth, domestic production will struggle to keep pace with demand driving a higher dependence on imports over the 10-year forecast period. Our outlook on the downstream segment is heavily bearish, due to ageing and poorly efficient refining capacity, weak profitability and limited appetite for investment.

Latest Updates & Key Trends:

The government has announced plans to reform legislation covering its oil and gas sector. Key reforms include the separation of oil and gas from mining laws, an increased role for the Department of Energy and the division of policies governing the upstream, midstream and downstream sectors.

While the reforms are broadly positive, replacing the amended Mineral and Petroleum Resources Development Act, progress is liable to be slow and we do not expect major investment to return to the market over the short term.

Refining capacity will remain severely underutilised, as South African retailers opt for increasingly competitive refined fuel imports above domestic output. Globally, South African refiners are at a major disadvantage, due to a lack of domestic crude production, ageing infrastructure, inflated wage costs and frequent power outages.

Fuels consumption growth will remain relatively subdued, as high inflation and a weak currency weighs on consumer spending, whilst a poor macroeconomic outlook dulls demand in the domestic power and industrial sectors.

Contents

BMI Industry View

Table: Headline Forecasts (South Africa 2014-2020)

SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Table: Major International Players In South Africa's Offshore

Upstream Projects

Table: South Africa Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (South Africa 2014-2019)

Table: Oil Production (South Africa 2020-2025)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (South Africa 2014-2019)

Table: Gas Production (South Africa 2020-2025)

Refining

Latest Updates

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (South Africa 2014-2019)

Table: Refined Products Consumption (South Africa 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (South Africa 2014-2019)

Table: Gas Consumption (South Africa 2020-2025)

Trade - Oil

Crude Oil

Table: Crude Oil Net Exports (South Africa 2014-2020)

Table: Crude Oil Net Exports (South Africa 2020-2025)

Refined Fuels

Table: Refined Fuels Net Exports (South Africa 2014-2019)

Table: Refined Fuels Net Exports (South Africa 2020-2025)

Trade - Gas (Pipeline And LNG)

Latest Updates

Structural Trends

Table: Gas Net Exports (South Africa 2014-2019)

Table: Gas Net Exports (South Africa 2020-2025)

Industry Risk Reward Index

Africa - Oil & Gas Risk/Reward Index

Table: BMI Africa Oil & Gas Risk/Reward Index

Above-Ground Risks Dulling Below-Ground Potential

Table: BMI Africa Upstream Risk/Reward Index

Downstream Sector Holds Limited Opportunity

Table: BMI Africa Downstream Risk/Reward Index

South Africa - Risk/Reward Index

Market Overview

South Africa Energy Market Overview

Regulatory Structure

Fiscal Regime

Table: Main Fiscal Terms

Licensing Regime

Licensing Rounds

Oil And Gas Infrastructure

Oil Refineries

Table: South Africa Main Refineries

Oil Pipelines

Table: South Africa Main Oil Pipelines

Oil Trade Facilities

Table: South Africa Main Oil Trading Facilities

Gas Pipelines

Table: South Africa Main Gas Pipelines

Oil Storage Facilities

Table: Oil Storage Main Facilities

Oil Terminals/Ports

Competitive Landscape

Competitive Landscape Summary

Table: Key Players In South African Oil And Gas Sectors

Table: Key Upstream Player

Table: Key Downstream Players

Company Profile

PetroSA

Latest Updates

Table: Key Financial Data (ZARmn)

Regional Overview

Africa - Bullish Gas, Bearish Oil

Table: Africa Oil & Gas Production, 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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