

South Korea Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Even as we expect the current lower oil price environment to continue to support refining margins and lower crude feedstock costs, the slowdown in demand in South Korea's major refined fuels exports markets, notably China, will keep a lid on exports growth over the next decade. We also note that while South Korea will remain a sizable net importer of LNG through to 2024, muted economic growth and energy diversification in the power sector will see the country's import requirements gradually trend downwards over the long-term.

Latest Updates And Key Forecasts

South Korea's large refining sector will keep its crude oil imports elevated over the next decade, helping it to maintain its position as the world's fifth largest crude oil importer.

The Middle East will remain the country's largest supplier of crude oil, though the government is actively trying to diversify its crude sources. In fact, the country plans to provide freight incentives to non-Middle Eastern crude shipments from 2016. This will provide greater opportunities for suppliers in Europe, Africa and the Americas.

Contents

BMI Industry View

Table: Headline O&G Forecasts (South Korea 2013-2019)

Latest Updates And Key Forecasts

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Table: Proven Oil and Gas Reserves (South Korea 2013-2018)

Table: Proven Oil and Gas Reserves (South Korea 2019-2024)

Upstream Projects

Table: South Korea - Key Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (South Korea 2013-2018)

Table: Oil Production (South Korea 2019-2024)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (South Korea 2013-2018)

Table: Gas Production (South Korea 2019-2024)

Refining

Latest Updates

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (South Korea 2013-2018)

Table: Refined Products Consumption (South Korea 2019-2024)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (South Korea 2013-2018)

Table: Gas Consumption (South Korea 2019-2024)
Trade - Oil
Crude Oil Trade Forecasts
Latest Updates
Structural Trends
Table: Crude Oil Net Exports (South Korea 2013-2018)
Table: Crude Oil Net Exports (South Korea 2019-2024)
Refined Oil Trade Forecasts
Latest Updates
Structural Trends
Table: Refined Fuels Net Exports (South Korea 2013-2018)
Table: Refined Fuels Net Exports (South Korea 2019-2024)
Trade - Gas (Pipeline And LNG)
Latest Updates
Structural Trends
Table: Gas Net Exports (South Korea 2013-2018)
Table: Gas Net Exports (South Korea 2019-2024)
Industry Risk Reward Index
Table: Asia: Upstream Risk/Reward Index
Table: Asia: Downstream Risk/Reward Index
South Korea - Oil & Gas Risk/Reward Index
South Korea Upstream Index - Overview
South Korea Upstream Index - Rewards
South Korea Upstream Index - Risks
South Korea Downstream Index - Overview
Market Overview
South Korea Energy Market Overview
Fiscal Regime
Table: Key Fiscal Indicators
Open Blocks
Table: Open Offshore Blocks
Oil And Gas Infrastructure
Oil Refineries
Table: Refineries In South Korea
Oil Storage
Table: Oil Storage Facilities In South Korea
LNG Terminals
Table: LNG Terminals In South Korea
Gas Storage

Table: Gas Storage Facilities In South Korea

Table: Gas Storage Facilities In South Korea Under Construction

Gas Pipelines

Table: Gas Distribution Pipelines In South Korea

Competitive Landscape

Competitive Landscape Summary

Table: Key Players - South Korean Oil & Gas Sector

Table: Key Upstream Players

Table: Key Downstream Players

Company Profile

Korea Gas (KOGAS)

Korea National Oil Corporation (KNOC)

SK Innovation

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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