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Taiwan Oil and Gas Report Q2 2016

https://marketpublishers.com/r/T78E207594BEN.html
Date: March 2016
Pages: 71
Price: US$ 1,295.00 (Single User License)
ID: T78E207594BEN

Abstracts

BMI View: Despite a lower oil price environment, rising energy efficiency and import constraints will prevent weaker prices from increasing oil and gas consumption. We also note Taiwan's shares in the regional refined fuels exports market will come under growing competition from refining capacity expansions in the region's emerging economies, which will moderate their need for imports in the medium to long term.

Latest Updates and Key Forecasts

As of January 1 2016, Taiwan's state-owned CPC Corporation officially closed its Kaohsiung oil refinery. This has reduced the country's overall crude oil refining capacity by 16.8% to 1.1mn b/d.

Taiwan's refined fuels consumption will remain weak over the next two years, contracting by 1.5% from 937,170b/d in 2016 to 923,160b/d in 2018. This will be the result of subdued economic performance, a sharp slowdown in car sales growth and rising fuel efficiency among the country's vehicle fleet.

According to Platts reports in late 2015, Taiwan's private refiner Formosa Petrochemical Corporation plans to double 10ppm sulfur gasoil exports to Philippines from 2016, as the country switches to Euro 4- compliant standards.

The decline in Taiwan's refining capacity is expected to lower net crude oil imports by 5% (year-on-year) to 935,050b/d in 2016. We expect the net imports of crude to continue declining across our forecast period to around 901,000b/d in 2025.

We hold our previous forecast that Taiwan to become a small net refined products importer in 2016. However, the imports of refined products will remain

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small, rising to 8,590b/d in 2025.

We estimate that Taiwan imported 16.7bcm of gas in 2015 and forecast the imports to remain stable in 2016 and 2017. The expansion of the LNG import capacity in 2018 and 2022 will lift the country's gas import volumes to 19.9bcm by 2025.

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