

Thailand Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Above ground risks continue to weigh on the outlook for investment in the exploration and production necessary to reverse the current trend of declining reserves and production of both oil and gas. Despite untapped offshore potential, Thailand's dependence on imports is expected to grow as consumption, particularly of natural gas, accelerates and domestic output stagnates.

Latest Updates And Key Forecasts:

The 21st licensing round, which was initially pushed to February 2015, remains indefinitely delayed. Political and regulatory uncertainty will remain a key obstacle to investment in Thailand, which needs additional investment in exploration and production in order to prove up a declining reserve base. The round was supposed to offer 23 onshore and six offshore blocks to tap an estimated volume of 28.3bn to 151.6bn cubic metres (bcm) of natural gas and 20-50mn barrels of crude oil.

We estimate oil production in 2015 will increase to 452,000b/d and we forecast another small increase in 2016 as the Nong Yao and Wassana fields raise output to 455,000b/d. However, we anticipate output will decline from 2017 onwards. Notwithstanding the upside risk from development of some modest discoveries, above ground risks linked to the unsettled political situation, as well as the decline in global oil prices, are likely to delay or deter more substantial investment that could have a more significant impact on the current forecast trend.

Contents

BMI Industry View

Table: Headline Forecasts (Thailand 2013-2019)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Structural Trends

Table: Proven Oil And Gas Reserves (Thailand 2013-2018)

Table: Proven Oil And Gas Reserves (Thailand 2019-2024)

Upstream Projects

Table: Thailand Major Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (Thailand 2013-2018)

Table: Oil Production (Thailand 2019-2024)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (Thailand 2013-2018)

Table: Gas Production (Thailand 2019-2024)

Refining

Latest Update

Structural Trends

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

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

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (Thailand 2013-2018)

Table: Refined Products Consumption (Thailand 2019-2024)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Thailand 2013-2018)

Table: Gas Consumption (Thailand 2019-2024)

Trade - Oil

Latest Updates

Crude Export Outlook

Structural Trends

Table: Crude Oil Net Exports (Thailand 2013-2018)

Table: Crude Oil Net Exports (Thailand 2019-2024)

Refined Fuels Trade Outlook

Table: Refined Fuels Net Exports (Thailand 2013-2018)

Table: Refined Fuels Net Exports (Thailand 2019-2024)

Table: Total Net Oil Exports - Crude and Products (Thailand 2013-2018)

Table: Total Net Oil Exports - Crude and Products (Thailand 2019-2024)

Trade - Gas (Pipeline and LNG)

Latest Updates

Structural Trends

Table: Gas Net Exports (Thailand 2013-2018)

Table: Gas Net Exports (Thailand 2019-2024)

Industry Risk Reward Index

Table: Asia: Upstream Risk/Reward Index

Table: Asia: Downstream Risk/Reward Index

Thailand - Risk/Reward Index

Market Overview

Thailand Energy Market Overview

Regulatory Structure

Fiscal Regime

Table: Thailand - Upstream Tax Regime

Table: Thailand - Contracts and Licensing Regime

Exclusive Economic Zone

Licensing Rounds

Oil And Gas Infrastructure

Table: Oil Refineries In Thailand

Oil Terminals/Ports

LNG Terminals

Table: Thailand - Existing and Planned LNG Terminals

Gas Storage Terminal

Table: Thailand - Gas Pipelines

Table: Thailand - Crude Oil Pipeline

Competitive Landscape

Competitive Landscape Summary

Table: Key Players In Thailand's Oil & Gas Sector

Company Profile

Chevron
ExxonMobil (Thailand)
Ophir Energy
PTT
PTT Exploration And Production (PTTEP)
Thai Shell Co
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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