

Denmark Oil and Gas Report Q2 2016

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Abstracts

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BMI View: We expect a partial but temporary recovery in oil and gas volumes over the medium term, as small developments come online. Past 2019 however, production will resume to the downside. While the country should remain a net oil and gas exporter throughout most of our forecast period, exports will become increasingly thin. We note increasing downside risks to our production forecast as the start-up date for the Hejre field is increasingly uncertain.

Latest Updates And Key Forecasts

Oil and gas reserves are depleting for this small mature North Sea producer and we do not expect the country to significantly reverse this trend. Ongoing exploration and the recent licensing round could yield upside risk to our forecast by the end of our forecast period. However, the strong decline in oil prices and our expectation of a lower price environment over the coming years temper this upside risk.

Total abandoned shale exploration in Denmark in August 2015 due to disappointing exploration results. We expect the low oil and gas price environment will dissuade further shale gas exploration over the coming years.

New World Oil and Gas relinquished its licenses in both the onshore Danica Jutland Project and offshore Danica Resources Project following the expiry of its licenses in September 2015. This is reportedly due to the company not finding a farm-in partner despite the analysis highlighting the licenses' prospectivity, significantly re-risking the licenses and finding one drillable prospect

Oil and gas production will increase slightly over the coming years as several small developments will help production recover. Overall, Denmark's hydrocarbon production trend clearly remains one of decline, with strong depletion rates at maturing fields. We note increasing downside risks to both oil and gas production due to delays on the Hejre field.

With a continuous fall in energy intensity, increased fuel efficiency and a progressive increase in renewable energy consumption, we expect domestic oil and gas consumption will decrease throughout our forecast period.

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