

Qatar Oil and Gas Report Q2 2016

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Abstracts

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BMI View: The moratorium on upstream gas projects will limit the overall level of activity in the coming quarters, while work on a small number of enhanced oil recovery and redevelopment projects continues. We expect the fall in crude production to continue, with downside risk to steeper decline rates if enhanced recovery programmes are scaled back due to capex cuts. Qatar's dominance of the liquefied natural gas export market will increasingly be challenged by other producers, but efforts to diversify the economy away from oil and gas will soften the impact.

We highlight the following trends and developments in Qatar's oil and gas sector:

Qatar announced in 2015 that it would invite new bids for al-Shaheen when the current contract expires in mid-2017. In line with an effort to increase state control in the upstream sector will see Qatar seek new international oil companies (IOCs) for a 25-year exploration and production agreement. Though Maersk will be among the firms able to bid, uncertainty over long-term ownership of the field could slow investment in the near-term.

Gas production in Qatar will remain relatively flat as LNG exports continue at strong levels and domestic gas consumption, which will see healthy growth as reliance on gas-fired power generation continues, is met by the Barzan project. LNG exports are expected to slightly increase to 104.9bcm in 2016, up from 103bcm in 2015. However LNG exports will have declined by end of our forecast period to 94.7bcm.

Post-2016 Qatar does not have any new LNG contracts coming into force and with 30.1bcm of contracts rolling off in the next ten years, will have to start

negotiating new contracts to secure long-term offtake. Despite the demand weakness in South Korea and Japan, we expect Asia to remain the dominant consumer of LNG, driven by strong growth in emerging markets such as China and India. As such, it will remain a key target for Qatar.

Qatar is expected to see reduced investment in its oil and gas sector over the coming quarters as it attempts to diversify its economy. The majority of upstream investment in the next three years will focus on oil field redevelopments.

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