

# Algeria Oil and Gas Report Q1 2016

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## Abstracts

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**BMI View:** The outlook on Algerian oil production is heavily bearish, due to rapid decline rates at mature producing fields and the small pipeline of projects currently under development. The outlook on gas is slightly more positive, although strong domestic consumption growth will continue to weigh on exports. Reversing longer-term production declines depends on pulling increased foreign investment into the sector. However, the prospects here are clouded by an unattractive fiscal and regulatory regime and the weakened commodity price environment.

### Key Trends & Latest Updates

Algeria has substantial underexplored acreage. However, exploration will remain limited due to Sonatrach's strained financial position and a lack of foreign involvement in the sector.

The long-term outlook on oil and gas production is heavily bearish. A spate of small to medium-sized projects will support medium-term production growth, but a lack of new projects scheduled to come onstream beyond 2018-2019 will see decline rates outpacing new production.

Oil and gas consumption will continue to grow, as pervasive subsidies fuel inefficient consumption patterns.

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