

Algeria Oil and Gas Report Q2 2016

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Abstracts

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 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 are clouded by an unattractive fiscal and regulatory regime and the weakened commodity price environment.

Latest Updates And Key Forecasts

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.

The combination of rising consumption and falling production will severely undercut exports of oil and gas towards the end of our forecast period to 2025. Revenue will be further impacted by sustained lower commodity prices.

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