

Algeria Oil and Gas Report Q3 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 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, including recent announcements of plans to allow companies to directly invest in a limited number of fields. However, the prospects are clouded by an unattractive fiscal and regulatory regime, ongoing security concerns, 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 over the long term.

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.

A 2016 attack on a gas processing facility at the hand of Al Qaeda in the Islamic Maghreb (AQIM) underscored the ongoing security challenges facing industry assets.

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.

Contents

BMI Industry View

Table: Headline Forecasts (Algeria 2014-2020)

SWOT

Oil & Gas SWOT

Industry Forecast

Upstream Exploration

Latest Updates

Structural Trends

Table: Total Mean Undiscovered Conventional Resources In Basins Covering Algeria

Table: Algeria Fourth International Bid Round Block Awards

Upstream Projects

Table: Algeria Major Upstream Projects

Upstream Production - Oil

Latest Updates

Structural Trends

Table: Oil Production (Algeria 2014-2019)

Table: Oil Production (Algeria 2020-2025)

Upstream Production - Gas

Latest Updates

Structural Trends

Table: Gas Production (Algeria 2014-2019)

Table: Gas Production (Algeria 2020-2025)

Refining

Latest Updates

Structural Trends

Table: Refining Capacity and Refined Products Production (Algeria 2014-2019)

Table: Refining Capacity and Refined Products Production (Algeria 2020-2025)

Refined Fuels Consumption

Latest Updates

Structural Trends

Table: Refined Products Consumption (Algeria 2014-2019)

Table: Refined Products Consumption (Algeria 2020-2025)

Gas Consumption

Latest Updates

Structural Trends

Table: Gas Consumption (Algeria 2014-2019)

Table: Gas Consumption (Algeria 2020-2025)

Trade - Gas (Pipeline & LNG)

Latest Updates

Structural Trends

Table: Algeria LNG Contracts

Table: Gas Net Exports (Algeria 2014-2019)

Table: Gas Net Exports (Algeria 2020-2025)

Trade - Oil

Latest Updates

Structural Trends

Crude Oil

Table: Crude Oil Net Exports (Algeria 2014-2020)

Table: Crude Oil Net Exports (Algeria 2020-2025)

Refined Fuels

Table: Refined Fuels Net Exports (Algeria 2014-2019)

Table: Refined Fuels Net Exports (Algeria 2020-2025)

Industry Risk Reward Ratings

Africa - Oil & Gas Risk/Reward Index

Table: BMI Africa Oil & Gas Risk/Reward Index

Above-Ground Risks Dulling Below-Ground Potential

Table: BMI Africa Upstream Risk/Reward Index

Downstream Sector Holds Limited Opportunity

Table: BMI Africa Downstream Risk/Reward Index

Algeria - Risk/Reward Index

Upstream Index

Downstream Index

Market Overview

Algeria Energy Market Overview

Regulatory Overview

Licensing Regime

Table: Algeria Model PSC Main Licensing Terms

Fiscal Regime

Table: Algeria Model PSC Main Fiscal Terms

Licensing Rounds

Table: Algeria 2014 Licensing Round

Oil And Gas Infrastructure

LNG Terminals

Table: Algeria LNG Export Terminals

Oil Refineries

Table: Algeria Oil Refineries

Gas Pipelines

Table: Algeria Main Gas Export Pipelines

Competitive Landscape

Competitive Landscape Summary

Table: Key Players In The Algerian Energy Sector

Table: Key Upstream Players

Table: Key Downstream Players

Company Profile

Enterprise Nationale Sonatrach

Latest Updates

Regional Overview

Africa - Bullish Gas, Bearish Oil

Table: Africa Oil & Gas Production, Consumption, Refining Capacity And Trade

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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