

Angola Oil and Gas Report Q3 2016

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Abstracts

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BMI View: Angola's oil production is forecast to remain strong and unaffected by low oil prices, with output rising up until 2018. Post-2018 oil production will fall off due to a steep decline in rates on mature fields and no new projects forecast to counteract the declines. However, with plenty of pre-FID projects in the pipeline and a strong oil major presence, oil production risks lie to the upside. Gas production will remain limited throughout our forecast with weak domestic demand, but will benefit from the ALNG coming back online after two years of closure. The downstream outlook is bleak, as we have removed one of the two planned refineries from our forecast due to a lack of progress and the poor financial position of Sonangol.

Latest Updates And Key Trends

Angola will see continued exploration of its prospective offshore waters. However, we expect a slowdown in high-cost, high-risk ultra-deepwater and pre-salt drilling as companies look to rein in capital expenditure and exercise tighter fiscal discipline.

We have removed the planned 200,000 barrel per day (b/d) Lobito refinery from our forecast due to the lack of progress on construction plans and the fragile state of Sonangol, the state petroleum company. The removal of the Lobito refinery from our forecast has resulted in Angola remaining a net importer of refined fuels for the decade. Angola has a rapidly growing refined fuels demand with consumption averaging 4.0% over the next 10 years driven by robust construction sector growth and rises in disposable household income. Therefore, despite the Soyo refinery helping to ease imports needs from 80,000 b/d in 2018 to less than 2,000 b/d in 2020, strong domestic consumption will

result in imports rising post-2020 and by 2025 we expect Angola's refined fuels imports to stand at 33,000 b/d.

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