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Angola Oil and Gas Report Q4 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.

Cobalt's Zalophus-1 exploration well in Block 20, discovered a total of 570mn barrels of equivalent (boe), comprising 139mn barrels of condensate and 2.5 trillion cubic feet (tcf) of gas. The discovery is Cobalt's sixth pre-salt discovery offshore Angola and its third discovery in block 20. However, despite this remarkable run of exploration success, the Houston based company is in negotiations with Sonangol to sell its stake in the block, a possible sign of above-ground issues.

BP made a sizable discovery in Block 24, totalling 1.7bn boe, that comprises

280mn barrels of condensate and 8tcf of gas.

Isabella dos Santos has taken over as head of Sonangol, pledging to clean up the state oil company, making it more transparent and efficient while healing ties with international oil companies operating in Angola.

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