

# Bulgaria Oil and Gas Report Q1 2016

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## Abstracts

Includes 3 FREE quarterly updates

BMI View: Improvements in the refining sector are boosting the downstream outlook, though 2016 will be tougher with margins expected to drop. The restart of exploration in the Black Sea is positive for Bulgaria's oil and gas sector, which has suffered from heavy production declines in 2015.

The main trends and developments in Bulgaria's oil and gas sector are:

Total will drill in the Black Sea Khan-Asparuh block between February and May 2016.

Shell is due to expected to sign a contract to explore the Silistar Block after it was retendered along with the Teres block that received no bids.

We have downgraded our gas production forecast for 2015 to 150mcm, due to strong decline rates at existing fields.

Petroceltic is planning to tieback the Kavarna East field to the Galata platform, which could boost production from late 2016.

Refined fuels production is due to increase almost 18% in 2015 over 2014.

Gasoline production has been particularly strong following the completion of Lukoil's new heavy residue complex.

Despite this, a weak economy has limited refined fuels demand, which will barely grow in 2015.



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