

France Oil and Gas Report Q3 2016

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Abstracts

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BMI View: The overall level of investment in exploration and production in France remains weak and this trend is unlikely to alter significantly without an end to political opposition to exploration of shale oil and gas resources. Plans to begin production of gas from coal bed methane by 2017 could provide a muchneeded boost to domestic output, but uncertainty over the project continues. Though downstream margins have benefited from cheaper oil prices, the long-term outlook for the refining sector in France, and in Europe more widely, remains largely pessimistic.

Latest Updates and Key Forecasts

Political disputes continue to hold back exploration of shale gas and oil, which estimates suggest exist in sufficient amounts in France to have a material impact on the weak existing outlook for reserves. Modest, but notable, investment continues toward development of France's coal-bed methane deposits, but technical and regulatory uncertainty persists, preventing any revision of our forecasts on the back of activity for now.

Downstream capacity and production will continue to fall with the 160,000b/d La Mede refinery set to be converted to a biofuels plant from 2017. Further refinery closures are likely as the European market continues to realign to competitive pressure and falling demand. Refiners will need to further specialise to remain competitive and to adapt to the changing conditions in the European refined fuels market.

Energy efficiency gains, a stagnant vehicle fleet and low GDP growth underpin our forecast for continued decline in refined fuels consumption. Demand for key

fuels, such as diesel, has failed to recover despite lower prices, signalling a long trend towards lower consumption.

Strong decreases in refining capacity and refining utilisation rates have seen, and will continue to see, falling crude oil net import requirements over the forecast period. France will remain dependent upon imports of diesel, jet fuel and other products to meet domestic demand as structural imbalances persist. The fuels trade faces increased competition from rival producers in the US and elsewhere.

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