

France Oil and Gas Report Q4 2015

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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.

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

Supported by high oil prices, France saw a modest, but nonetheless notable, increase in upstream investment in conventional plays in the Alsace region and the Paris Basin over 2014. However, the decline in global oil prices is forecast to have a negative impact on interest in exploration and production (E&P) in France's small oil sector. Industry data indicate that crude production in France is viable from a commercial perspective in the USD70 per barrel range - a price level that we currently forecast Brent is unlikely to reach until the end of the decade.

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