

# Gabon Oil and Gas Report Q2 2016

<https://marketpublishers.com/r/GC9E45AB33CEN.html>

Date: April 2016

Pages: 90

Price: US\$ 1,295.00 (Single User License)

ID: GC9E45AB33CEN

## Abstracts

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BMI View: Gabon's oil sector remains vulnerable to the decline in global oil prices, with reports of delays to a key upstream project on the back of uncertain economic conditions. Continued upstream investment is indicative of the market's untapped potential, but above-ground worries ranging from industrial action to unattractive fiscal terms will remain obstacles to the sustained investment necessary to reverse declining reserves and output.

The main trends and developments we highlight for Gabon's oil and gas sector are as follows:

Gabon will be among the countries least exposed to a regional slowdown in exploration spending, thanks to the more proven nature of its basins, high prospectivity and the range of companies active in its waters. However, Gabon will need to significantly relax its fiscal terms, if it is to secure new investment in its flagging oil and gas sector. This is notably the case in the context of the 11th Licensing Round planned for 2016.

In October 2015, Shell reported its Leopard Marin discovery offshore Gabon may be a new commercial gas discovery, saying it could be the 'first potentially multi-million trilling cubic feet find in a new gas play.' In 2014, the Leopard-1 well which was drilled to a total depth of 5,063m, had encountered a gas column with 200m of net gas pay.

Gabon's oil production will remain in a downtrend despite redevelopment works and field tie-ins slightly stemming the production decline over the coming years. The country's ability to offset output decline from its major maturing oilfields

hinges on development of its pre-salt resources. In this domain, the major pre-salt Dussafu block FID is delayed. We do not include it within the forecast until more certainty is provided concerning the development.

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