

Ghana Oil and Gas Report Q4 2015

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Abstracts

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BMI View: The outlook on Ghana's upstream oil and gas sector remains broadly bullish, with development of the major Jubilee, TEN and Sankofa fields driving strong production gains over the next five years. However, continued fiscal and regulatory uncertainties and a moratorium on exploration drilling in the disputed territories with Cote d'Ivoire will limit upside to development and production in the back-end of our forecast period. The outlook on the downstream remains poor, and will drive a growing dependence on refined fuels imports across the decade.

We hold a bullish view on Ghana's oil and gas sector, as production from Jubilee, TEN and Sankofa ramps up in the front end of our forecast period. However, strong growth in consumption will outpace production, driving a widening supply demand deficit in the country. The country holds attractive underexplored acreage, although a maritime boundary dispute and continued regulatory uncertainty may dull drilling activity over the coming years.

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