

Indonesia Oil and Gas Report Q2 2016

<https://marketpublishers.com/r/I98A40CD6B9EN.html>

Date: March 2016

Pages: 183

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

ID: I98A40CD6B9EN

Abstracts

BMI View: An uncertain regulatory environment and low oil prices will impede exploration and hydrocarbons in Indonesia. Outlook for the downstream sector is more positive as economic growth will support refined fuels consumption growth and refinery projects have attracted interest from overseas investors.

Latest Updates and Key Forecasts

Indonesia's crude oil production is on a long-term decline and the country will become a net importer of crude oil from 2020. As firms continue to relinquish their exploration and production blocks, we see limited upside risks to production.

Indonesia's refining capacity is set to expand by 510,000b/d over the next decade as several of the country's aging refineries undergo upgrading and the expected start-up of the Bontang refinery in 2022. This will reduce Indonesia's refined fuels deficit, though it will remain a sizeable net importer to 2025. Foreign investors continue to be interested in the country's refining projects.

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