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Abstracts

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BMI View: Regulatory uncertainty and low oil prices will impede exploration in Indonesia. Though the refinery upgrade and newbuild projects draw interest from national oil companies, they are progressing slowly and Indonesia will remain a large importer of refined fuels.

Latest Updates and Key Forecasts

We believe that the proposed amendment to Indonesia's oil and gas law will create regulatory uncertainty. Together with the low oil price environment, it will serve to dampen investor interest in the upcoming licensing round in 2016.

We have revised up our forecast for Indonesia's 2016 crude oil and gas production, as higher than expected production ramp-up at several major projects will offset mature field decline. Production will fall from 2017 for crude oil and from 2018 for gas.

We have downgraded Indonesia's refining capacity forecast. We believe that delays to the upgrading of the Cilacap refinery, the first among a pipeline of refinery upgrade and newbuild projects, will push back successive projects.

The weak oil price environment is a boon for Indonesia's refined products consumption. Combined with a bright macroeconomic outlook, we maintain our forecast for the country's refined products consumption to increase at an average rate of 1.8% per annum over the next decade.

Indonesia's gas consumption will increase at an average rate of 4.1% per

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annum over the next decade, as a result of a greater shift to gas-fired electricity generation in the power sector. We highlight upside risks to our forecast from greater gas usage in power, transportation and the residential sectors.

Due to declining crude oil production, Indonesia will still turn from a net exporter of crude oil to a net importer in 2020, despite our downwardly revised forecast for Indonesia's refining capacity.

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