

Italy Oil and Gas Report 2014

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Abstracts

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Although Italy is thought to retain moderate untapped hydrocarbons potential, bureaucratic and regulatory challenges are set to hamper previously outlined goals to reduce the country's hefty import burden. Despite the start of production from the Tempa Rosa field from 2017, we see only limited upside risk to our production forecast from current exploration and production efforts. While we expect increased reliance on liquefied natural gas (LNG) imports as new infrastructure comes online, we are not yet assuming all planned terminals will go ahead, given delays to other plans. We also see risks that Italy's sizable downstream sector will see further downsizing as the sector struggles under the pressure of persistently low margins.

The main trends and developments we highlight in Italy's oil and gas sector are:

According to the EIA, Italy is estimated to have produced 156,530 barrels per day (b/d) in 2013. We see this remaining broadly stable until 2015. We forecast that Italy will see an increase in oil production from 2017 onwards, as the Tempa Rosa field comes online. Production is set to peak at around 210,000 b/d in 2020.

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