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Abstracts

Includes 3 FREE quarterly updates

BMI View: Despite prolonged delays at the giant Kashagan field, which are suppressing Kazakhstan's huge underground potential, and the gradually worsening regulatory environment, we maintain a positive longer-term outlook for the country's oil & gas sector. The Kashagan and Tengiz projects will maintain oil production capacity and boost overall production by some 200,000b/d over our forecast period.

Key developments in Kazakhstan's oil & gas industry:

This quarter, we have revised down our oil production forecast for Kazakhstan to take into account continued delays on the Kashagan oil field and the lack of final investment decision for the Tengiz field expansion. We now expect first oil from Kashagan in mid-2017, and from the Tengiz expansion in 2021. Oil production will continue on a slow upward trend, boosted by these two key projects.

We expect a minor increase in refining capacity in 2017 following the modernisation and upgrading works at the three refineries. Gasoline production will be boosted and lower grade residual fuels production will be reduced. We note upside risk to refining capacity at the tail-end of our forecast period from capacity expansion plans at the Shymkent refinery.

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