

# Kazakhstan Oil and Gas Report Q3 2016

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## Abstracts

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**BMI View:** We maintain a positive outlook for Kazakhstan's oil production, thanks to huge underground potential and the delayed Kashagan field expected to come online by 2017, with the Tengiz project forecast to start production in 2021. Our forecasts for gas and refined products consumption remain subdued for 2016 due to economic headwinds facing Kazakhstan; however we expect an uptick in growth from 2017 onwards as the macros become more favourable.

Key developments in Kazakhstan's oil & gas industry:

The Kazakh Energy Ministry stated that it had plans to carry out additional evaluation work on Aktoty and Kairan fields, with further exploration work also expected to be done on the Kurmangazy field in 2016.

We expect oil production to be 1.67mn b/d in 2016, with steady increases forecast until 2022. The risks for oil production lie to the upside, with plenty of room for expansion on a number of Kazakhstan's hydrocarbon rich fields.

Kazakhstan contains extensive hydrocarbon potential that continues to attract some of the world's largest oil companies, giving us reason to believe that the country's oil and gas reserves will expand over our forecast period.

KMG EP announced in February that it has discovered oil on the North-Eastern flank of S. Nurzhanov field. Two appraisal well are planned to be drilled in 2016-2017 and trial production is expected in 2018.

Our house view on Kazakhstan's economic outlook has improved somewhat,

mainly on the back of an upwards revision in our oil price outlook. However private final consumption growth is forecast to be only 0.8% in real term this year keeping us bearish on fuels consumption this year.

The upgrade to the Chevron operated Caspian Consortium Pipeline is due to be completed by the end of 2016, boosting capacity to 1.4mn b/d.

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