

Kazakhstan Oil and Gas Report Q4 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 2022. 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:

We have altered our gas forecasts for Kazakhstan based on revised historical data. While our consumption figure remains the same, we have revised up our natural gas production and gas exports for 2015. Going forward we believe that Kazakhstan's gas production will be limited by the crowded regional market and a lack of domestic consumption. This is despite the Kazakhstan's gross production being significantly higher than commercialised production and it holding considerable gas reserves.

Total foreign investment into Kazakhstan's oil and gas exploration was USD1.51bn in Q116 according to the National Bank of Kazakhstan.

Chevron announced in July that its Tengiz expansion program should receive first oil by 2022, adding an additional 260,000 b/d. The project will raise Tengizchevroil's production, of which Chevron has a 50% stake, to approximately 1 million b/d, as the company extends the production plateau using enhanced oil recovery techniques.

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