

# Norway Oil and Gas Report Q2 2016

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## Abstracts

Includes 3 FREE quarterly updates

BMI View: New field developments and improved recovery will stabilise oil production over the 2016-2019 period. Weaker oil prices will curtail investment, although the long-term impact will be masked by the vast Johan Sverdrup project starting in 2019. Gas production will improve as lower prices support European demand.

### Latest Updates And Key Forecasts

Crude, condensate and other liquids production increased 2.4% y-o-y in 2015, reaching 1.938mn b/d.

In 2016, the Goliat field (Q1) and the Flyndre development (H2) will support production declines.

Non-exploration investment in the Norwegian continental shelf fell around 17% in 2015 and is due to drop again in 2016 and 2017.

Subsea compressors installed at the Gullfaks and Åsgard fields in September and October 2015 will also support our outlook for oil production growth in 2016.

Gas production increased 7.7% y-o-y in 2015, reaching 117.4bcm.

Total announced it will delay the Martin Linge project to 2018, while the final investment decision on Statoil's Snorre 2040 project has also been delayed to Q416.

Exploration wells are due to fall from 56 in 2015 to an estimated 32 in 2016,

according to the NPD? although exploration in the Barents will increase from 7 to 10 wells.

Refinery utilisation ran at 100% utilisation in 2015, with 359,000b/d of refined fuels produced. This will be lower in 2016 as oil prices improve.

56 production licences were offered to 36 different companies in Norway's APA 2015 round.

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