

Philippines Oil and Gas Report Q3 2016

<https://marketpublishers.com/r/P6F87D92D46EN.html>

Date: July 2016

Pages: 71

Price: US\$ 1,295.00 (Single User License)

ID: P6F87D92D46EN

Abstracts

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BMI View: Falling natural gas and condensates output at the Malampaya field is unlikely to be replaced by other significant sources of oil and gas production; the Philippines' dependence on crude oil, refined fuels and LNG will deepen over the next 10 years.

The main trends and developments we highlight for the Philippines' oil and gas sector are:

The Philippines is set to commence its first LNG trade when Energy World Corporation's 4.1bcm LNG import terminal at Pagbilao comes online in H216.

First Gen Corp's USD1.0bn LNG import project in Batangas is slated to come online by 2021/2022.

Implementation of Euro-IV fuels standards nationwide from January 2016 will increase domestic supply of higher-quality fuels (gasoline, low-sulphur diesel, LPG & petrochemicals) at the expense of heavier, more pollutive fuels.

Completion of Phase II & III expansion works at the Malampaya field will help to improve recovery rate and extend production life, though the field is anticipated to deplete by 2030.

PNOC-EC made a potentially commercial gas discovery at the Mangosteen field, which could provide a small boost to domestic gas output in the latter half of the decade.

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