

# Philippines Oil and Gas Report Q4 2015

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## Abstracts

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BMI View: Flagging production and rising domestic demand will see the Philippines' dependence on crude oil and refined fuels imports deepen over the next 10 years. The construction of the country's first LNG import terminal in 2015 will see the Philippines become an importer of LNG, and allow domestic gas consumption to grow beyond local production.

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

We forecast a decline in the Philippines' oil and gas reserves, as sustained weakness in global oil prices slowdown exploration, which in turn limits the chances of making new discoveries.

Crude oil production will fluctuate around the 25,000b/d-28,000b/d range throughout our forecast period to 2024. We note significant downside risk to our forecast particularly from 2019, as these are based on projects where final investment decisions have not been made.

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