

# Russia Oil and Gas Report Q3 2016

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## Abstracts

Includes 3 FREE quarterly updates

BMI View: Oil production continues to outperform as a weak rouble allows for maintained capex and lower operating costs. Gas production, which underperformed in 2015, will improve as domestic and foreign demand pick up.

The main trends and developments we highlight for Russia's oil & gas sector are:

Crude and condensate production averaged 10.9mn b/d in Q116, up from 10.7mn b/d in Q115. We forecast production to increase from 2015 and remain largely flat to 2018.

Gas production was flat in 2015 (635bcm) and remains on par with 2015 output in Q116.

The finance minister expects oil export duty to drop to the planned 30% in 2017, from 42% currently.

Refined fuels consumption fell heavily in 2015 given the recession, and is expected to be weak in 2016

.This will allow for increased exports, particularly diesel.

Refinery upgrades to Euro-V standards are now complete among major refiners. Euro-V standards are due to be implemented nationwide from August 1 2016.

Mineral extraction tax for non-liquefied gas exporters (or Gazprom) will increase

in 2016, generating around RUB100bn (USD1.62bn) for the government.

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