

Russia Oil and Gas Report Q4 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 has been steady though exports, particularly to Europe, are up 14% over H116.

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

Crude oil and condensate production averaged 10.87mn b/d in H116.

Lukoil has begun development drilling on the Vladimir Filanovsky field in the Caspian Sea and is targeting first oil by the end of the year. Plateau production is due to reach 120,000b/d.

Rosneft is moving forward with exploration in the Lisyansky and potentially the Magadan-1 block in the Sea of Okhotsk over the summer.

BP (49%) has committed up to USD300mn to the Yermak-Neftegaz exploration joint venture with Rosneft (51%). The focus of exploration will be Yenisey-Khatanga and Western Siberia.

Russian gas production over H116 was 4bcm lower than H115.

Gas exports to Europe, however, increased 10.9bcm to 84.9bcm in H116.

Train 1 of the Yamal LNG project is reportedly 70% complete and the USD19bn financing has been approved.

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

Overall refinery throughput has reduced around 3.3% in H116 over H115.

Gasoline, diesel and jet fuel production remains stable, though fuel oil output has reduced over H116 as deeper refining capabilities improve.

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