

Saudi Arabia Oil and Gas Report Q2 2016

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Abstracts

BMI View: Saudi Arabia will maintain its crude production broadly flat in 2016. However, longer-term production will rise, to answer growing demand from the domestic power and downstream sectors. The kingdom is increasingly targeting its exploration and development spending towards its non-associated gas resources. Saudi Arabia has vast unconventional gas resources, but the pace of production will be slowed by low state-set gas prices and limited foreign participation in the sector. The consumption outlook is positive for both oil and gas. However, we have revised down our refined fuels consumption forecasts in response to an accelerated subsidy reform programme.

Latest Updates & Key Trends

Saudi output will remain broadly flat in 2016, before resuming a gentle upward trend from 2017.

However, we forecast exports to remain flat as new refining capacity is brought online, absorbing forecast production growth.

In order to support exports, the kingdom has looked to increase the role of gas in the domestic power and industrial sectors. However, domestic gas consumption remains heavily capped due to limited production growth.

In spite of Saudi Arabia's heavy focus on unconventional and onshore non-associated gas resources, we expect slow progress in developing these prospects. Domestic production will likely remain insufficient to meet unrestrained demand.

Despite inadequate domestic supply, proposals to import LNG will face major roadblocks, due to concerns over the loss of the kingdom's energy self sufficient

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