

# Saudi Arabia Oil and Gas Report Q4 2015

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## Abstracts

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BMI View: Despite continued oversupply in global oil markets, Saudi Arabia will increase its crude production in 2015. The kingdom will raise output in an attempt to maintain export share against rising domestic demand. Crude demand will grow both as a result of an expanded domestic refining sector and increased consumption in the kingdom's power sector. Fuels consumption will also see strong growth, due to a positive macro environment and high level subsidisation.

However, gas consumption will remain heavily constrained, as domestic production fails to keep pace with the growth in unrestrained demand.

In an attempt to maintain crude oil export share, we expect Saudi output to increase its production y-o-y in 2015.

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.

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