

# Sudan Oil and Gas Report Q1 2011

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## Abstracts

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The new Sudan Oil & Gas Report from BMI forecasts that the country will account for 2.53% of African regional oil demand by 2015, while providing 6.37% of supply. African regional oil use of 3.06mn barrels per day (b/d) in 2001 will rise to an estimated 3.81mn b/d in 2010. It should average 3.90mn b/d in 2011 and then rise to around 4.40mn b/d by 2015. Regional oil production was 7.93mn b/d in 2001, and will in 2010 average an estimated 10.18mn b/d. From an estimated 10.52mn b/d in 2011, it is set to rise to 12.08mn b/d by 2015. Oil exports are growing steadily, because demand growth is lagging behind the pace of supply expansion. In 2001, the region was exporting an average of 4.87mn b/d. This total rises to an estimated 6.36mn b/d in 2010 and is forecast to reach 7.68mn b/d by 2015. Angola has the greatest production growth potential, with Nigerian exports set to climb if it can resolve recent quasi-political issues.

In terms of natural gas, the region in 2010 will consume an estimated 123.4bn cubic metres (bcm), with demand of 175.9bcm forecast for 2015. Production of an estimated 219.5bcm in 2010 should reach 322.6bcm in 2015, which implies net exports rising from an estimated 96bcm to 147bcm in 2015. Sudan is currently neither a consumer nor producer of gas.

For 2010 as a whole, we assume an average OPEC basket price of US\$77.00/bbl (+26.5% y-o-y). The 2010 US WTI price is now put at US\$9.16/bbl. BMI is assuming an OPEC basket price of US\$80.00/bbl in 2011, with WTI averaging US\$82.25, Brent at US\$82.46/bbl, Urals delivering around US\$81.21 and the Dubai average being US\$80.74/bbl. Our central assumption for 2012 is an OPEC price averaging US\$85.00/bbl, delivering WTI at approximately US\$87.40 and Brent at US\$87.60/bbl. From 2013 onwards, we are using an average OPEC price of US\$90.00/bbl.

For the whole of 2010, the BMI assumption for the global gasoline price is an average US\$87.49/bbl, representing a y-o-y rise of 24.7%. The global gasoil forecast is for an average price of US\$88.00/bbl, probably peaking in December 2010 at more than US\$95/bbl. The full-year outturn represents a 27.6% increase from the 2009 level. For 2010, the annual jet price level is forecast to be US\$89.500/bbl. This compares with US\$70.66/bbl in 2009. The 2010 average naphtha price is put by BMI at US\$77.65/bbl, up almost 31% from the previous year's level.

Sudan's real GDP is assumed by BMI to rise by 7.6% in 2010. We are forecasting average annual growth of 5.7% in 2010-2015. We expect oil demand to rise from an estimated 87,000b/d in 2010 to 111,000b/d in 2015. State oil company Sudan National Petroleum Corporation (Sudapet) is active in the country's oil exploration and production (E&P) sector, working in partnership with foreign (largely Asian) companies in raising oil output from an estimated 545,000b/d in 2010 to 770,000bd in 2015. There are no plans for significant gas production or consumption.

Between 2010 and 2020, we are forecasting an increase in Sudanese oil and gas liquids production of 27.7%, with volumes peaking at 770,000b/d in 2015, before falling steadily to 696,000b/d by the end of the 10-year forecast period. Oil consumption between 2010 and 2020 is set to increase by 62.9%, with growth slowing to an assumed 5.0% per annum towards the end of the period and the country using 142,000b/d by 2020. Details of BMI's 10-year forecasts can be found in the appendix to this report. Sudan holds last place, below even Equatorial Guinea, in BMI's composite Business Environment (BE) table, which combines upstream and downstream scores. The country holds 11th and last place in BMI's updated upstream Business Environment ratings. The country's score suffers from a very poor country risk rating, the absence of gas resources and significant state influence. Unless the risk profile changes for the better, Sudan will struggle to edge away from the foot of the table, in spite of healthy oil resources. Sudan is below the mid-point of the league table in BMI's updated downstream Business Environment ratings, with few high scores and progress further up the rankings unlikely unless the energy market grows more rapidly or new refineries are built. It is ranked seventh, above Gabon, Equatorial Guinea and Cameroon, thanks to low scores for gas demand, country risk factors and nominal GDP.

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