

Turkey Oil and Gas Report Q2 2016

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Abstracts

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BMI View: Turkey will continue to increase its consumption of crude oil, natural gas and refined fuels throughout our forecast period, which goes as far as 2020, remaining a net importer of all three. Positive exploration results in the Thrace Basin present upside risk to our gas production forecast.

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

With Russian-Turkish relations in a precarious state, President Recep Tayyip Erdogan has stated that moving away from Russian energy dependence is a priority, with Turkey importing more than 50% of its natural gas and 11% of crude oil from Russia in 2015. However, we anticipate little change to Russia's prominent role in Turkey's energy mix as, according to our Turkey Country Risk analysts, political rhetoric seldom has real economic implications.

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