

Turkmenistan Oil and Gas Report Q1 2016

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Abstracts

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BMI View: As a result of its growing gas reserves, Turkmenistan is making efforts to also increase production and exports, notably to China. Our forecast for gas production to reach 103.5bcm per annum by 2019 implies an average growth rate of 8.2% a year, meanwhile gas exports will increase from 49bcm in 2015 to 70.8bcm in 2019. The country's rising export potential is supported by significant strengthening of ties with China, with whom it shares the China-Central Asia Pipeline.

We expect oil reserves will significantly deplete over our forecast period as production remains high but little progress is made towards resolving the Caspian maritime border dispute. Gas reserves will remain largely stagnant despite production increases, given the newly discovered mega-fields in the southeast of the country and potential for significant new discoveries in the area.

A renewed emphasis on international investment, along with developments by Turkmenneft, has led to a slow but progressive increase in oil production. This will endure over the coming years. Larger production growth within our forecast period, however, will be impossible until a sustainable agreement is reached between Iran, Turkmenistan and Azerbaijan on Caspian maritime border disputes. This would enable the development of larger offshore fields.

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