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# Turkmenistan Oil and Gas Report Q2 2016

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## Abstracts

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BMI View: We have strongly reduced our gas production outlook for Turkmenistan this quarter on the back of increasingly limited export options for the country: Russia and Iran are curtailing imports and Chinese gas intakes will grow at a slower pace than expected on the back of slowing economic growth. This leaves Turkmenistan increasingly dependent on China, with little credible export market alternatives over the short-to-medium term.

A renewed emphasis on international investment, along with developments by Turkmennebit, has lead to a slow but progressive increase in oil production. This will endure over the coming years. Larger production growth within our forecast period, however, is unlikely until a sustainable agreement is reached between Iran, Turkmenistan and Azerbaijan on the Caspian maritime border dispute.

The difficult business environment could, however, dissuade international investors, notably at a time of capital expenditure cut backs as oil prices remain low. For example, German company DEA Deutsche Erdoel is reportedly planning to relinquish its Caspian Sea concession as of October 2015 over frustration at excess bureaucracy, corruption and a lack of permit granting.

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