

# Uganda Oil and Gas Report Q4 2016

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## Abstracts

Includes 3 FREE quarterly updates

BMI View: Despite delays to the Hoima refinery start-up date, we have not yet altered our forecast for crude output, which we still expect from 2020. This is largely leveraged on the April 2016 decision to proceed with the Uganda-Tanzania oil pipeline route, instead of the originally planned Uganda-Hoima (Kenya) pipeline route. Nevertheless, we highlight risks to our crude oil production timeline still lies to the downside, given the risks to infrastructure projects which remain.

### Latest Updates And Key Forecasts

With reserves of 2.5bn barrels of crude, Uganda has Sub-Saharan Africa's fourth-largest crude reserves, behind Nigeria, Angola and South Sudan. There is limited short-term upside risk to reserves: current exploration and appraisal campaigns have reached an end and new exploration will be delayed until more concrete progress is made towards developing existing discoveries. Limited interest in the ongoing licensing round will delay short to medium term new exploration.

After years of delays, the Ugandan state minister for minerals reported in June 2016 that the country should issue six production licenses to Tullow Oil and Total before the end of the summer. This is positive news after years of uncertainty.

This quarter, we have delayed our forecast for the start-up of the Hoima refinery to 2021 following the failure of the Ugandan government and preferred bidder RT Global, to come to an agreement. The change represents an additional year delay to our previous forecast and is three years beyond the government's initial

2018 target launch (see 'refining section' of this report).

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