

Ukraine Oil and Gas Report Q1 2016

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Abstracts

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BMI View: A volatile security situation and continuing geopolitical tensions hamper exploration and production activities in Ukraine. Regulatory challenges, illustrated by recent tax hikes on oil, gas and mineral extraction, are expected to act as a further deterrent to investment in Ukraine's oil and gas sector. The gas deal between Russia, the EU and Ukraine signed in September 2015 will supply sufficient gas for Ukraine to get through the 2015-2016 winter with an uninterrupted supply. A harsh winter however would severely deplete storage and force Ukraine to accelerate its gas efficiency plans moving into winter 2016.

Key forecasts and developments:

The exits of Chevron and Shell from their respective shale gas exploration projects highlight the downside risk to our gas reserves forecasts over the coming quarters.

Despite large reserves and an active exploration scene, gas production in Ukraine is forecast to continue shrinking across our forecast period to 2024. Upstream activities will suffer from an unpredictable regulatory and fiscal environment, the legal uncertainties regarding offshore Crimean licenses and the ongoing security situation in the East of the country.

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