

Ukraine Oil and Gas Report Q2 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. Despite Ukraine's significant gas supply diversification efforts, we expect the country will continue to depend to some extent on Russian gas supplies over the coming winters.

Key forecasts and developments:

We maintain our forecasts for oil and gas reserves this quarter. However, we note that Chevron and Shell's exits from their respective shale gas exploration projects create increasing downside risk to our gas reserves forecasts.

Most of Ukraine's refineries remain closed as of 2016 leading to a severe underutilisation of its refining capacity. We maintain this situation will endure until an amelioration in the political, economic and security situation comes through.

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