

Ukraine Oil and Gas Report Q3 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.

Downside risk to oil production exists over the coming year from a tax dispute between Ukrnafta and the Ukrainian state. In March 2016 the company received a formal notification from the State Service of Geology & Mineral Resources of Ukraine that 16 of its licenses could be suspended, in addition to three recent suspensions. According to the company, the suspension of these licenses would stop production of about 6,500b/d of crude oil, a significant proportion of the company's production and of the country's total 38,000b/d crude and condensates production in 2016.

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.

Given the country's disastrous refining sector, crude net imports have fallen substantially over the past decade and are expected to remain low over the coming decade. Nevertheless, this has also translated into increasing refined products import requirements, as domestic production is insufficient to meet demand. Net imports of refined products will pick up speed as consumption recovers. This is unlikely to change unless the refining sector undergoes a significant revamp.

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