

United Arab Emirates Oil and Gas Report Q1 2016

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Abstracts

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BMI View: A pipeline of projects under development will boost gas output growth over the coming two to three years.

However, the high cost and technically challenging nature of the non-associated gas resource base, coupled by rising gas reinjection into the UAE's maturing oilfields, will dampen growth in the longer term.

Oil production rests heavily on the use of enhanced oil recovery techniques, which may come under strain in a lower commodity price environment.

Despite moves towards energy subsidy reform, we forecast strong growth in both oil and gas consumption, driving rising imports of pipeline gas and LNG.

However, substantial expansion of domestic refining capacity will turn the UAE into net exporter of fuels from 2016.

We highlight the following trends and developments in the UAE's oil & gas sector:

A number of projects under development will boost oil and gas production in the coming years. However, the UAE is heavily reliant on maturing oil fields and accelerated depletion rates in a lower oil price environment remain a risk to the sector.

The UAE holds little unexplored territory and the space for a major new discovery is limited; reserves will be supported by continued improvement in recovery rates.

Refined fuels consumption growth is set to remain strong, despite ongoing subsidy reform. The impact of reforms will be somewhat blunted in the short run by the sharp fall in international oil prices and a sustained uptrend in vehicle sales.

Gas consumption growth will remain strong, although the pace of growth will slow progressively due to increased electricity tariffs and diversification of the domestic power mix towards nuclear and renewables.

The UAE has seen its refined capacity and refined fuels output grow significantly in 2015 as the Ruwais refinery expansion was brought on stream. The UAE will become a net exporter of refined fuels from 2016, added to its substantial crude export volumes.

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