

# United States Oil and Gas Report Q4 2015

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## Abstracts

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**BMI View:** The US will continue to lead gains in non-OPEC crude oil production over the next decade. High growth rates seen in recent years will moderate through our 10-year forecast period, reflecting abrupt depletion rates in shale oil fields, a glut in the domestic market for light sweet crude, and lower oil prices dampening some production.

Consumption for fuels will be largely stagnant throughout the course of the next decade as energy efficiency gains take root. In the gas market, we forecast a ramp-up in production when demand gears up from 2016 onwards as new LNG export facilities and petrochemical plants come online.

Falling oil prices, especially on the WTI contract, have pressured developments on the fringes of the US oil industry. Our research suggests the majority of shale oil growth remains profitable above USD60/bbl, with more developed 'sweet spot' acreage profitable at rates as low as USD40/bbl. With prices now trading below USD50/bbl, marginal areas within some of the plays will be negatively impacted beginning in the latter half of 2015.

## Contents

### BMI Industry View

Table: Headline Forecasts (United States 2013-2019)

### SWOT

### Oil & Gas SWOT

### Industry Forecast

### Upstream Exploration

Table: Proven Oil and Gas Reserves (United States 2013-2018)

Table: Proven Oil and Gas Reserves (United States 2019-2024)

### Upstream Projects

Table: US - Major Upstream Projects

### Upstream Production - Oil

Table: Oil Production (United States 2019-2024)

### Upstream Production - Gas

Table: Gas Production (United States 2013-2018)

Table: Gas Production (United States 2019-2024)

### Refining

Table: Refining Capacity and Refined Products Production (United States 2013-2018)

Table: Refining Capacity and Refined Products Production (United States 2019-2024)

### Refined Fuels Consumption

Table: Refined Products Consumption (United States 2013-2018)

Table: Refined Products Consumption (United States 2019-2024)

### Gas Consumption

Table: Gas Consumption (United States 2013-2018)

Table: Gas Consumption (United States 2019-2024)

### Trade - Oil

Table: Crude Oil Net Exports (United States 2013-2018)

Table: Crude Oil Net Exports (United States 2019-2024)

Table: Refined Fuels Net Exports (United States 2013-2018)

Table: Refined Fuels Net Exports (United States 2019-2024)

Table: Total Net Oil Exports - Crude and Products (United States 2013-2018)

Table: Total Net Oil Exports - Crude and Products (United States 2019-2024)

### Trade - Gas (Pipeline And LNG)

Table: Gas Net Exports (United States 2013-2018)

Table: Gas Net Exports (United States 2019-2024)

### Industry Risk Reward Index

### North America And Western Europe Oil & Gas Risk/Reward Index

Table: North America & Western Europe Oil & Gas Risk/Reward Index

Table: Oil & Gas Upstream Risk/Reward Index  
Wide North America / Western Europe Upstream Gap To Remain  
North America: Canada Losing Its Edge  
Western Europe Languishes Without Shale Outlook  
Downstream: US Comes Out Top  
Table: Oil & Gas Downstream Risk/Reward Index  
United States - Risk/Reward Index  
Market Overview  
United States Energy Market Overview  
Licensing And Regulation  
Government Policy  
Licensing Rounds  
Table: Total BOEM Acreage To Be Offered 2012-2017  
Table: 2016-2017 Lease Sale Schedule  
International Energy Relations  
Table: Key Upstream Players  
Oil And Gas Infrastructure  
Oil Refineries  
Table: New US Refineries  
Table: 2014 Refinery Expansions  
Table: Refineries In the US  
Service Stations  
Oil Storage Facilities  
Oil Terminals/Ports  
Oil Pipelines  
Table: US Crude Oil Pipelines Online/Planned, 2012-2014  
LNG Terminals  
Table: LNG Terminals In the US  
Table: US LNG Export Terminal Projects  
Gas Storage Facilities  
Gas Pipelines  
Table: New Natural Gas Pipelines  
Competitive Landscape  
Competitive Landscape Summary  
Table: Key Upstream Players  
Table: Key Downstream Players  
Company Profile  
Anadarko  
BP America

Chevron

ConocoPhillips

ExxonMobil

Shell USA

Other Summaries

Regional Overview

North America And Western Europe Oil & Gas Regional Overview

Global Industry Overview

Global Energy Market Overview

Table: Top 10 Global Oil Producers - Crude Oil, Condensates & NGLs Production ('000b/d)

Table: Oil Production Growth 2015-2024 ('000b/d)

Table: Oil Production Growth 2015-2024 ('000b/d)

Appendix

Global - Crude Oil, Refined Fuels And Natural Gas Prices, 10-Year Forecasts

Table: Energy Price Forecasts (Global 2013-2018)

Table: Energy Price Forecasts (Global 2019-2024)

North America Regional Appendix

Table: Oil Consumption - Historical Data & Forecasts, 2012-2019 ('000b/d)

Table: Oil Consumption - Long-Term Forecasts, 2016-2024 ('000b/d)

Table: Oil Production - Historical Data & Forecasts, 2012-2019 ('000b/d)

Table: Oil Production - Long-Term Forecasts, 2016-2024 ('000b/d)

Table: Refining Capacity - Historical Data & Forecasts, 2012-2019 ('000b/d)

Table: Refining Capacity - Long-Term Forecasts, 2016-2024 ('000b/d)

Table: Gas Consumption - Historical Data & Forecasts, 2012-2019 (bcm)

Table: Gas Consumption - Long-Term Forecasts, 2016-2024 (bcm)

Table: Gas Production - Historical Data & Forecasts, 2012-2019 (bcm)

Table: Gas Production - Long-Term Forecasts, 2016-2024 (bcm)

Table: LNG Exports - Historical Data & Forecasts, 2012-2019 (bcm)

Table: LNG Exports - Long-Term Forecasts, 2016-2024 (bcm)

United States - Total Hydrocarbons, 10-Year Forecasts

Table: Total Hydrocarbons Production, Consumption And Net Exports (United States 2013-2018)

Table: Total Hydrocarbons Production, Consumption And Net Exports (United States 2019-2024)

United States - Refined Products Breakdown, 10-Year Forecasts

Table: Refined Petroleum Products, Production Breakdown (United States 2013-2018)

Table: Refined Petroleum Products, Production Breakdown (United States 2019-2024)

Table: Refined Petroleum Products, Consumption Breakdown (United States

2013-2018)

Table: Refined Petroleum Products, Consumption Breakdown (United States

2019-2024)

Table: Refined Petroleum Products, Net Exports Breakdown (United States

2013-2018)

Table: Refined Petroleum Products, Net Exports Breakdown (United States

2019-2024)

Table: LPG Production, Consumption And Net Exports (United States 2013-2018)

Table: LPG Production, Consumption And Net Exports (United States 2019-2024)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Source

Risk/Reward Index Methodology

Table: Bmi's Oil & Gas Upstream Risk/Reward Index

Table: Weighting

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