Iran Oil and Gas Report Q3 2015

Description: Despite seeing a small increase in oil production and exports following the Geneva Interim Agreement, a more significant increase can only result from an easing or lifting of international sanctions.

We are increasingly bullish on the prospects of the success of a deal by June 2015, and a subsequent lifting of the sanctions. In such a situation, a significant ramp-up in production and exports to pre-sanction levels would take three to four years from when sanctions are lifted. Years of underinvestment, maturing oil fields and a lack of field and well maintenance has damaged fields. Gas production will continue to grow, with further development of South Pars phases. Despite strong growth, limited access to capital and technology will still prevent production from accelerating sufficiently to meet demand. This will translate into gas shortages and limits the options of large regional gas exports in the short to medium term.

We highlight the following trends and developments in Iran's oil and gas sector:
- Iran holds the fourth-largest oil reserves and second-largest gas reserves in the world. Given the maturity of the country's fields, the replenishment of oil reserves remains an important issue. A vast majority of gas reserves in the country remain undeveloped, a situation which will endure in a context of continued international sanctions.

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