Chad Oil and Gas Report Q3 2016

Description: The ramping up of production from Glencore and China National Petroleum Corporation’s new fields will support production increases in 2016 and 2017. Post 2017 there will be a gradual decline in output as a poor project pipeline is unable to offset the falling production rates at the mature Doba field.

Despite large proven reserves and pipeline infrastructure in place, the author believes that the poor business environment and extraction problems that the consortium is facing will discourage further foreign investment in Chad. Throughout the forecast period, Chad will remain a net exporter of refined fuels and crude oil. The non-existent gas infrastructure gives us reason to believe that there will be no natural gas production in the forecast period.

Latest Updates And Key Forecasts

- Consumption for refined fuels is set to increase throughout the forecast period at an average annual rate of 4% y-o-y. Chad’s refined fuel consumption starts from a low base, with the majority of demand coming from the electricity sector.

- Despite the last couple of years providing positive drilling results, exploration prospects are weak in Chad throughout the forecast period. Capex cuts across all companies operating in Chad will limit exploration activity.

- Oil production is expected to rise in 2016 and 2017 as output ramps up from the fields that were brought online in 2015. However the long term trend is downwards as decline rates at mature areas accelerate with no new projects in the pipeline to offset the declines.

- Chad will remain a net exporter of both crude and refined fuels throughout the forecast. Crude exports will increase up to 2017, before declining alongside the fall in production. Refined fuels exports will decrease for the forecast period increase up to 2020, declining after due to a lack of new refining capacity coming online while domestic demand expands.

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