Oil and Gas Supply – Africa and the Middle East

A 10-year projection and review of oil and gas production and consumption

Report summary

- Insight on oil and gas production trends in the producing regions across the Middle East and Africa, along with 10-year production forecasts
- Forecasts of oil and gas consumption in specific countries across the region
- An evaluation of likely future oil and gas trade patterns and export capabilities
- Understanding of the changing nature of production capability in specific markets and how this will change over time

Use this report to gain understanding of which markets will see increased production levels over the next decade

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About this report

Introduction

Having witnessed in 2008 the first major signal that future conventional oil and gas supplies will become much harder to find and more expensive to develop, Datamonitor is publishing this analysis of deep water production around the world. As secure energy supplies become increasingly difficult and expensive to extract, an accurate forecast of supply/demand dynamics becomes more important.

Historically, global economic recessions have led to declining energy demand, but the resultant lower prices have soon led to a recovery in demand and then prices, especially as OPEC has acted to rein in output to tighten supply. This trend has already been reflected in the oil markets to some degree. In the gas sector, supplies will be available only if investment in infrastructure, above all long-distance pipelines and LNG conversion and receiving plants, is well advanced.

Key findings and highlights

- Algria has large non-associated gas reserves including the giant Hassi R'Mel field, along with associated gas output. Gas production is projected to expand rapidly as new markets are exploited in southern Europe, although growth is likely to flatten off towards the end of the decade.
- Angolan oil supply, at first largely from shallow waters off the coast of Cabinda, would have peaked in the late 1990s had it not been for the huge deep water potential recognized in the mid-1990s. This led to significant expansion in oil output and continued growth is forecast up to 2017 after a brief decline in 2009 because of OPEC obligations.
- Nigerian oil consumption declined after 2005 but is now increasing slowly while exports have been flat. Exports are expected to grow from 2010, reaching a peak in 2013. Gas consumption is increasing as the country attempts to make more use of its produced and wasted gas volumes.

Reasons to buy

- Gain understanding of which markets will see increased production levels over the next decade
- Identify potential commercial opportunities through an understanding of changing demand and supply dynamics in specific markets
- Analyze the changing balance between on and offshore production

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Sample pages

Angola

Supply

Angolan oil supply, at first largely from the shallow waters off the coast of Cabinda, would have peaked in the late 1990s if it had not been for the huge deep water potential recognized in the mid-1990s. This has led to a significant expansion in oil output and continued growth is forecast up to 2016–17 after a brief decline in 2009 because of OPEC obligations. Deep water production commenced in 2001 with TOTAL's giant Girassol field in Block 17 and many more fields have now entered production in this and other blocks in deep and ultra-deep waters.

Associated gas production has been flared or re-injected, but a planned new LNG plant is due on-stream in 2012 which will lead to growing marketed production levels. Angola joined OPEC in early 2007.

Demand

The foreign revenue derived from oil exports has allowed Angola to develop rapidly. Oil consumption, mostly used in automobiles, has increased and will continue to increase throughout the next decade. Angola uses little gas but growing output will allow the country to expand its electricity generation and its industrial and residential gas infrastructure. This growth will increase substantially as exports of LNG begin.

Table 3: Angola production

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Oil, ON (000s b/d)	10.2	9.6	9.1	8.6	8.2	8.6	9.7	11.2	12.7	14.1	15.4	16.5	17.5	18.3	18.9
Oil, OFF (000s b/d)	1,236	1,409	1,710	1,872	1,773	2,039	2,121	2,382	2,510	2,562	2,621	2,695	2,688	2,642	2,580
Total oil (000s b/d)	1,246	1,419	1,719	1,881	1,782	2,048	2,131	2,394	2,523	2,576	2,636	2,712	2,706	2,660	2,599
Gas, ON (bcm/yr)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gas, OFF (bcm/yr)	0.7	0.7	0.8	1.1	1.2	1.6	2.3	3.4	5.4	7.4	9.5	12.2	15.5	18.3	20.6
Total gas (bcm/yr)	0.7	0.7	0.8	1.1	1.2	1.6	2.3	3.4	5.4	7.4	9.5	12.2	15.5	18.3	20.6
Total (000s b/d)	**1,258**	**1,431**	**1,734**	**1,899**	**1,802**	**2,075**	**2,171**	**2,453**	**2,615**	**2,705**	**2,799**	**2,922**	**2,973**	**2,976**	**2,953**

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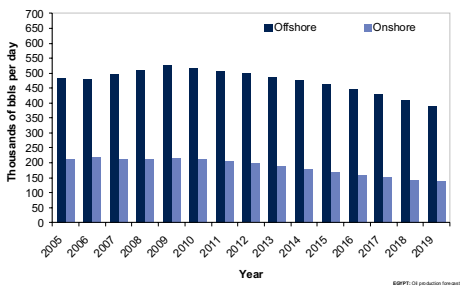
Egypt – figures

Figure 33: Egypt oil production forecast



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