



Oil Watch - Rest of World Oil Production (IEA)

Posted by [Euan Mearns](#) on December 7, 2012 - 12:56pm

Executive Summary

This is the final installment of the tour of global crude + condensate + natural gas liquids (C+C+NGL) production data as published by the International Energy Agency (IEA) and deals with the rest of the world. OPEC and OECD production was described in earlier posts.

After many decades of growth, Chinese oil production appears to have stalled in 2012 at just over 4 million bpd. It remains to be seen if this is a temporary glitch or whether this heralds peak and decline in Chinese oil production.

Russia + Former Soviet Union (FSU) production has been on a plateau for 3 years at just below 14 million bpd. Russian production continues to grow slowly offset by declines in other FSU states.

Oil production in Oman peaked at 960,000 bpd in 2001 and declined steadily to around 700,000 bpd in 2008. An aggressive program of enhanced oil recovery (EOR) has turned things around and production has risen by over 200,000 bpd in the last 4 years and Omani production is challenging the 2001 highs. There are profound lessons to be learned here about the potential impact of EOR on heavy oil fields and future global production.

Columbia has also seen a reversal of fortune with new field developments reversing declines and new production highs just under 1 million bpd have been set in recent months.

Figure 1 Oil production has been largely flat in South and East Asia over the decade, rising slowly from 2002 to 2011 and since then in gentle decline. Production in China and India has been rising offset by declining production in Indonesia and Malaysia. All data published in this interim report are taken from the monthly IEA [Oil Market Reports](#).

From May 2007 to August 2010, [Rembrandt Koppelaar](#) published an e-report called [Oil Watch Monthly](#) that summarised global and national oil production and consumption data from the International Energy Agency (IEA) of the OECD and Energy Information Agency (EIA) of the USA. This is the fourth in a series of new Oil Watch reports, co-authored with Rembrandt and details crude oil production data for the Rest of The World as reported by the [International Energy Agency](#). Earlier editions:

[Oil Watch - World Total Liquids Production](#)
[Oil Watch - OPEC Crude Oil Production \(IEA\)](#)
[Oil Watch - OECD Oil Production \(IEA\)](#)

South and East Asia

Figure 2 Oil production in China rose gradually from January 2011 to a near term peak of 4.29 million bpd in November 2010. Since then production growth has stalled giving rise to a bumpy plateau / slow decline. Static production in China could be one reason that the oil price has remained strong in recent years. Note chart not zero scaled.

Figure 3 Oil production in India has grown from around 800,000 bpd in 2002 to around 950,000 bpd in 2012. Note chart not zero scaled.

Figure 4 Oil production in Malaysia peaked at 890,000 bpd in October 2004 and since then has been in steady decline. Note chart not zero scaled.

Figure 5 According to BP, Indonesian oil production peaked at 1.67 million bpd in 1977 with a second peak of 1.67 million bpd in 1991. Since then production has been in steady decline. Note chart not zero scaled.

Russia and Former Soviet Union

Figure 6 Combined Russian and FSU production has been on a plateau of between 13 to 14 million bpd for 3 years. Russian production is still rising slowly offset by declining production elsewhere in the FSU.

Figure 7 Russian production rose sharply from 7 to 10 million bpd from January 2002 to January 2008. Since then the rate of growth has slowed dramatically but the direction is still quite definitely up. A near term peak of 10.75 million bpd was hit in September 2012 but this still falls short of production >11 million bpd of the late 80s. As pointed out in [this recent post](#), the Russians are having to pull out all the stops to maintain production at these levels. The slowing of growth in Russian production may be a factor in persistent high oil prices. Note chart not zero scaled.

Figure 8 The countries of the FSU comprise Kazakhstan, Azerbaijan and Turkmenistan. These countries are reported separately by the EIA and so when we get around to plotting that data a clearer picture of the FSU will emerge. FSU production rose sharply from 2002 to October 2009 at which point production growth stalled at 3.18 million bpd. Since then production is showing signs of entering a decline phase which is another factor pressuring oil supplies. Note chart not zero scaled.

Middle East Excluding OPEC Countries

Production from the Middle East OPEC countries is described [here](#). In the non-OPEC countries production has declined from around 2 million bpd in January 2002 to 1.5 million bpd in September 2012. Growing production in Oman bears witness to a major success story involving enhanced oil recovery (EOR). Production in Yemen and Syria is in decline and affected by civil unrest in recent years.

Figure 9

Figure 10 According to BP, oil production in Oman peaked at 960,000 bpd in 2001 and following that it entered a period of steady decline hitting 700,000 bpd in September 2008. Since then, there has been a somewhat miraculous turnaround with production growing steadily to reach 940,000 bpd in September 2012. This has been brought about by the application of a [range of EOR techniques to Oman's aging fields](#).

Oman has a unique arrangement for its oil production. Petroleum Development Oman (PDO) is owned 60% by the Oman government, 34% by Shell and 4% by Total. In effect Shell runs oil exploration and development in Oman with near monopoly status. Omani's therefore call upon the technical expertise and capital of one of the world's leading oil companies and this arrangement seems to be enabling the systematic application of EOR to relevant fields. It will be interesting to watch how far EOR is able to drive Omani production up.

Figure 11 Syrian production has been in steady decline since January 2002 and then went off a cliff with the outbreak of civil war. If Libya is an example to go by, then Syria will struggle to regain pre conflict production levels.

Figure 12 Yemen is Oman's neighbor on the Arabian peninsula. Production has been in steady decline over the decade punctuated by some civil unrest in recent years.

Africa Excluding OPEC Countries

Figure 13 Outside of OPEC, African oil production has been essentially flat for much of the decade at around 2.5 million bpd. A recent drop in production in February 2012 likely reflects the impact of the Arab Spring on N african producers like Sudan.

Figure 14 According to BP, Egyptian oil production peaked at 941,000 bpd in 1993. From 2002 to 2009 decline continued but production has since recovered to over 700,000 bpd, presumably as new fields have been brought on stream. Note chart not zero scaled.

Figure 15 Gabon is a small producer with essentially flat production of about 250,000 bpd over the decade. Note chart not zero scaled.

South America Excluding OPEC Countries

Figure 16 Outside of OPEC, South American production is dominated by Brazil. Brazilian and South American production grew steadily from 2002 to 2010 but then Brazilian production went of a small cliff - according to IEA data. We are not aware of any event in Brazil that could account for this and taking a quick look at EIA data (Figure 18) this precipitous drop is absent. It seems there is a problem with the IEA data for Brazil. A further comparison of IEA with EIA data will be conducted in a future post.

Figure 17 *There seems to be a problem with IEA data for Brazil. The precipitous drop in production in 2010 is not present in the EIA data (Figure 18).*

Figure 18 *EIA data for Brazil shows a steady rise in production from 2002 to 2011 with signs that production growth may be staling in 2012.*

Figure 19 *Argentinian production has declined slowly over the decade from 820,000 bpd in January 2002 to 650,000 bpd in September 2012.*

Figure 20 *According to BP, Columbian production peaked at 838,000 bpd in 1999 and this was followed by a period of decline. In 2007, Columbian production began to climb once again as new fields were discovered and developed and new peaks of 960,000 bpd have been reached in recent months.*



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