

# Bolivia Oil and Gas Report Q2 2016

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## Abstracts

Includes 3 FREE quarterly updates

**BMI View:** Upstream investment in Bolivia continues at steady levels, but weak reserves of both oil and gas have persisted, creating long-term uncertainty for production and exports. The fall in global oil prices has led to sharp reductions in earnings from oil-indexed gas sales to Argentina and Brazil, on whom Bolivia is entirely dependent for exports. Continued investment in projects to monetise domestic gas resources as through increased local consumption in the residential, power and industrial sectors could result in tightening of the supply-demand picture in the medium term.

Preliminary data from Yacimientos Petrolíferos Fiscales Bolivianos (YPFB) shows natural gas discoveries in Bolivia totalled about 1.5 trillion cubic meters in 2015, underscoring the country's below ground promise. However, we caution that significant operational headwinds will persist given the company's shrinking profits and budget amid the global sector downturn. Our outlook for 2016 remains positive with a number of key projects, including first gas from the Ipati and Aquio fields, but we caution that long term growth will be challenging to achieve.

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