

# Brazil Oil and Gas Report Q1 2016

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## Abstracts

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BMI View: Brazil's vast pre-salt reserves suggest substantial growth potential over the long term, underpinning our bullish upstream view that crude, natural gas, and other liquids output will rise throughout our forecast period. However, production growth will be limited by lower oil prices and decreased capex funds. As such, we maintain a relatively modest outlook, reflecting our view that the above-ground environment remains a considerable obstacle to the upstream and downstream segments due to weakening project economics, waning investor confidence, and a burdensome regulatory environment.

The key trends and developments in the Brazilian oil and gas sector are:

Brazil's 13th licensing round on October 7 was an outright disappointment, with only 37 of 266 blocks awarded. This was the worst turnout of any round over the past decade as existing international market participants including Shell, Total, and Statoil refrained from participating, supporting our more modest reserve growth outlook.

On October 5, Petrobras announced a USD11bn reduction to its Business and Management Plan (BMP) impacting spending over 2015 and 2016. In the wake of continued above-ground challenges, we expect the national oil company (NOC) will be forced to reassess its unchanged production targets over the next several quarters.

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