

Colombia Oil and Gas Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Our outlook for Colombia's oil and gas sector remains downbeat as lower oil prices are weighing on the development of upstream and downstream projects by national and international investors. As such, further expansion of the sector will become increasingly dependent on state-owned Ecopetrol. While the recent government's peace deal with FARC rebels should improve the operating environment, we note the continued risk of attacks on oil and gas infrastructure due to the presence of other guerrilla groups.

Latest Updates And Key Forecasts

In August 2016, Colombia's national oil company Ecopetrol said it will intensify exploration activities in the country and plans to drill 80 new wells until the end of 2016 on top of 25 wells which have been drilled already in 2016. Most of the new wells will be located in Rubiales and Castilla fields.

International oil companies in Colombia are continuing to face strong opposition against unconventional oil and gas exploration using fracking. In August 2016, the media reported about another large protest in Valparaiso.

According to the country's Mines and Energy Ministry, the production levels declined to 888,000b/d in June 2016, marking a 12% year-on-year decline.

This quarter we have further downgraded our 2016 production forecast due to persisting attacks on the country's mid-stream infrastructure. We now project crude oil and condensates output to decrease by 8.1% to 924,510b/d. Other liquids are forecast to add another 27,410b/d to that figure.

We have slightly lowered our forecasts for Colombia's gas production as the country's national oil company is focusing primarily on the oil sector, while the private investment into the gas sector is declining. We now expect gas output to decline by 4.0% year-on-year to 9.4bcm in 2016. By 2025, we expect the country's gas output to fall to 8.6bcm.

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