

# Ecuador Oil and Gas Report Q1 2016

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## Abstracts

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**BMI View:** Ecuador's upstream sector will largely suffer from the broader industry downturn through the remainder of the decade, but its downstream sector is likely to shift to net exporter status by 2019. We hold a downbeat growth outlook for the country as a result of increasingly limited upstream prospects and continued uncertainty regarding the future of Ecuador's largest untapped oil field.

Latest Updates and Key Forecasts:

Oil production will decline through 2018 as upstream investment declines amid continued low oil prices. This will be compounded by natural depreciation rates at the country's mature fields, despite efforts to increase recovery rates

A poor above ground environment, including unattractive contract terms and an uncertain regulatory environment, acts as a significant deterrent to greater foreign investment.

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