

Ecuador Oil and Gas Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Ecuador's upstream sector will 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 2018. We hold a modest 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:

We have upgraded our forecast for Ecuadorian liquids production to account for increased investment into its mature oil assets. We now expect the country to return to growth in 2016 as oilfield services (OFS) providers boost output from existing projects.

The continued practice of non-intervention by OPEC members will maintain elevated production levels and sustain oil price weakness over the next year. While profits within the sector will suffer, we believe the government will meet its external debt commitments over the next year owing to structural changes within the country's domestic economy.

The controversial ITT heavy oil field project began in April, with Petroamazonas spudding its first well in the Tiputini field on the fringe of the Yasuni National Park. Development of Block 43 began from the Tiputini C drilling pad in the Amazon rainforest despite strong grassroots and international opposition to the project given the environmentally sensitive nature of the area. First oil from the area is expected before the end of the year, with production expected to reach 20,000b/d by December.

The start-up of the modernised Esmeraldas refinery in Q415 will weigh on Ecuador's net crude exports as imported supplies are used to feed the facility.

With respect to gas, what little activity there is remains centred on bolstering output from Block 6 in the Gulf of Guayaquil. While there has been some investment into further exploration, we believe production of natural gas will remain minimal such that output will begin to slip toward the mid-point of our forecast period.

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