

Ecuador Oil and Gas Report Q4 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 will shift to net exporter status by 2018. Our modest growth forecast is as a result of increased private sector participation, but continued uncertainty regarding greenfield investments temper our enthusiasm.

Latest Updates and Key Forecasts

We maintained 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 controversial ITT heavy oil field project advanced in July following the spudding of Petroamazonas' first well in the Tiputini field in April. Located on the fringe of the Yasuni National Park, the development of Block 43 in the Amazon rainforest has continued despite strong grassroots and international opposition to the project given the environmentally sensitive nature of the area. In July, the government announced the field held more than 750mn bbl more than originally expected, encouraging our more optimistic reserve outlook. 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 is weighing on Ecuador's net crude exports as imported supplies are used to feed the facility.

With respect to gas, activity 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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