

Venezuela Oil and Gas Report Q1 2016

<https://marketpublishers.com/r/VE2BD83D39AEN.html>

Date: November 2015

Pages: 92

Price: US\$ 1,295.00 (Single User License)

ID: VE2BD83D39AEN

Abstracts

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BMI View: We maintain our cautious outlook for Venezuela's oil & gas sector despite vast belowground potential and ambitious production plans by state-owned PDVSA. We expect Venezuela to continue to underperform given the large scope of operational challenges, including excessive political interference, chronic underinvestment, an unattractive operating environment and the precarious financial situation of PDVSA. Moreover, the sustained fall in global oil prices will deteriorate production growth prospects as both PDVSA and international investors face declining revenues and a reduction in available capex funds.

We have upgraded our forecasts for exploration and production growth at the back end of our forecast period in light of our forecast for a more pronounced recovery in Brent benchmark prices beginning in 2018. However, we expect prices will average below USD80/bbl through 2024. As such, Venezuelan upstream activity will remain well below its potential given the country's vast below ground potential.

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