

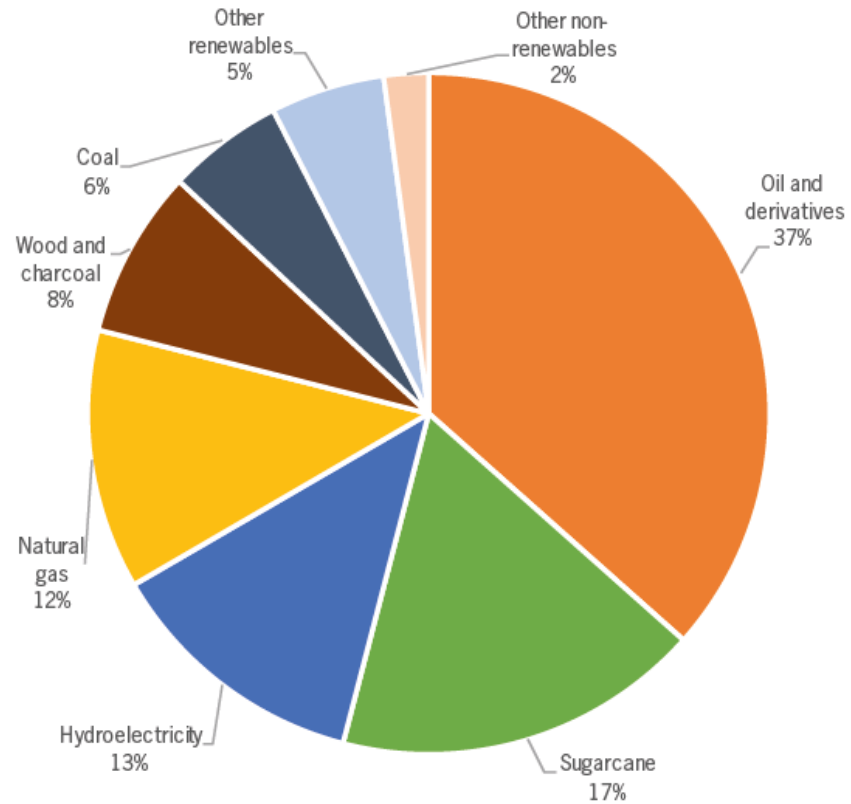


# Oil&Gas sector in Brazil





# Energy matrix





# Key factors

- 10th largest oil producer in the world (largest in LA)
- 7<sup>th</sup> largest consumer of oil products
- The sector answers for 11% of the industrial GDP
- Improved legal framework
- Wide range of well-funded international oil majors and EPCIs
- Pre-salt exploration in 2017: 1.3 billion barrels/day of a total of 2.16 billion barrels/day



# Potential investments

## Stationary Production Units – SPU Estimated Demand

~ 300 MODULES

Will be contracted with the Brazilian industry for...

39 PLATFORMS

With investments in Brazil around....

€ 8 bi

in MACHINES and EQUIPMENTS

€ 13.3 bi

In CONSTRUCTION, ASSEMBLY and INTEGRATION

€ 3.3 bi

In ENGINEERING

## Wells and Subsea Estimated Demand

39 PROJECTS

Will be realized in Brazil with estimated expenditures of...

€ 30.3 bi

in WELLS and...

€ 31.3 bi

In SUBSEA INSTALLATIONS

**€ 86 bi**

of potential  
investments in  
Brazil



# Lifespan - oil well

## STAGES

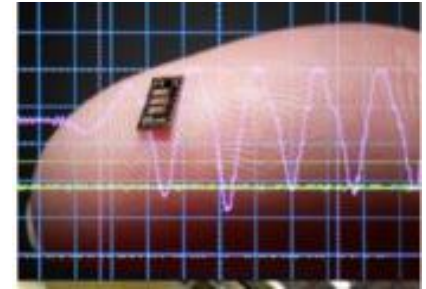
■ Exploration and Appraisal   ■ Production   ■ Decommissioning





# Opportunities for Dutch players

- HTSM
- Responsible Business Conduct (CSR)
- Innovation
- Sustainability





# Demand in Brazil >< Dutch Expertise

## 5 niches identified





# 1. Exploration and subsea

- Engineering
- Seismic survey and analysis
- Deep sea equipment (ROVs, pipes & cables laying)
- IT communication equipment
- Drilling





## 2. Operations, maintenance & repair

- Offloading
- Logistic efficiency
- Safety
- Ship repair
- Services execution



### 3. New build & installation

- Know-how and experience with HTSM
- Updated technology for shipyards
- Design
- Transfer of technology
- Accommodation facilities offshore



## 4. Decommissioning (?)

- Delicate discussion in Brazil
  - other priorities
  - costs not foreseen in planning 15/20 years ago
- Recuperation factor important for the national regulatory agency (ANP)
- Opportunities for small operators – wells with full infrastructure



# Training, human resources

- Technical university Brazilian Petroleum Institute (IBP)
- Partnerships for lectures and specialized courses
- Need for specialists
- Human Resources companies





# OTC Brasil Offshore Technology Conference

29-31 October, 2019  
Dutch pavilion (IRO)  
Round table IBP at OTC Houston



Thank you



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