

Understanding Local Opportunities in the Brazilian Petroleum Sector

Cartagena, march, 2015

Carlos Soligo Camerini

ONIP - Brazilian National Organization of the Petroleum Industry - Members

INDUSTRY



NATIONAL INDUSTRY SYSTEM



Slide Interno.jpg




FEDERAL GOVERNMENT

OPERATORS

STATE GOVERNMENT

Mission



TO CONTRIBUTE TO INCREASE **COMPETITIVENESS**
AND **SUSTAINABILITY** OF THE DOMESTIC INDUSTRY
TO MAXIMIZE **LOCAL CONTENT** AND THE
GENERATION OF EMPLOYMENT AND INCOME IN
THE OIL AND GAS SECTOR



SUPPLY CHAIN DEVELOPMENT PROGRAM

CadFor - Registry System for Operators in Brazil

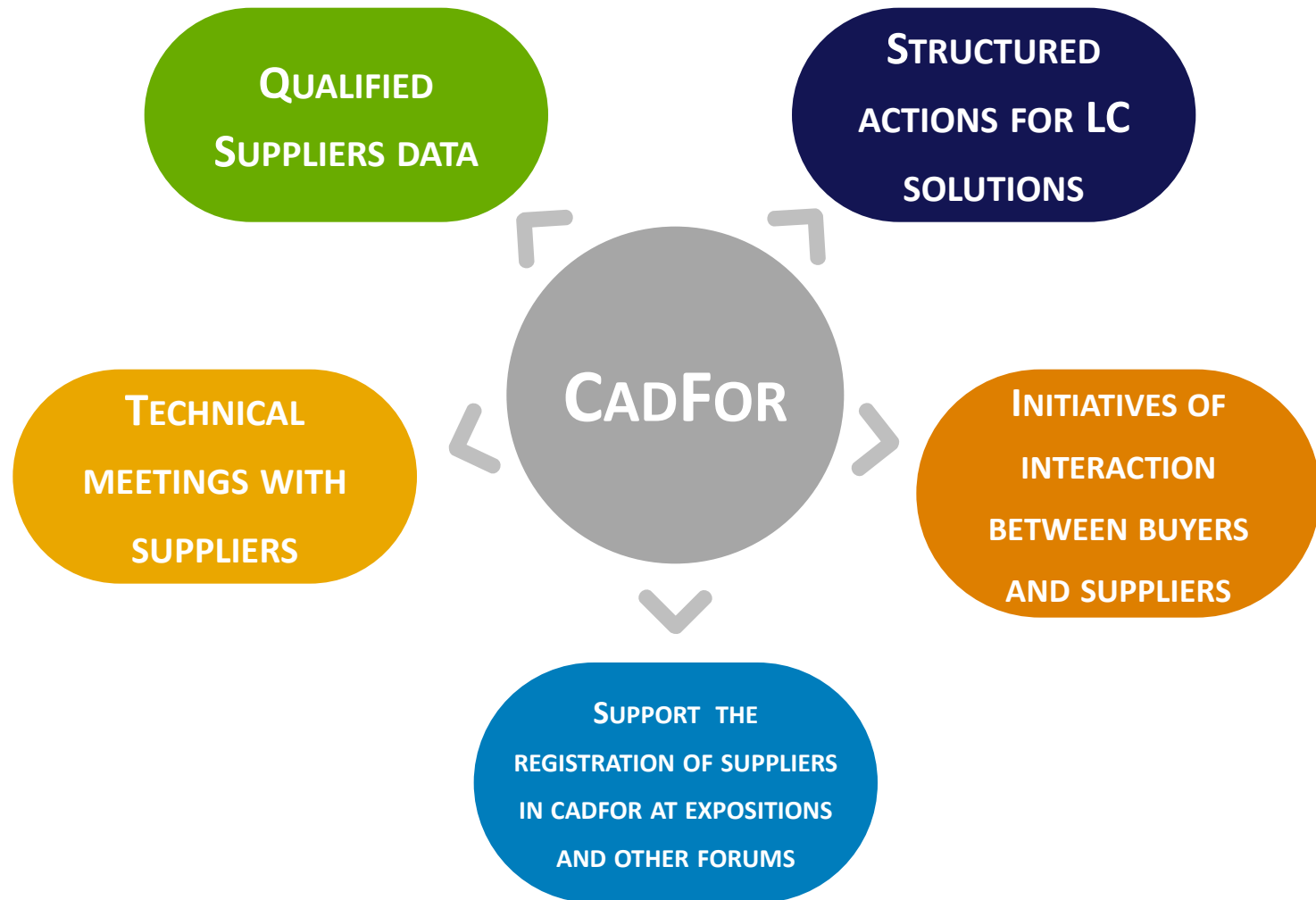
The objective is to increase the knowledge about local suppliers



BG BRASIL



CadFor - Objectives



Oil sector in the Brazilian Economy



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Projected Investments - 2014 / 2017

Selected sectors (R\$ billion)

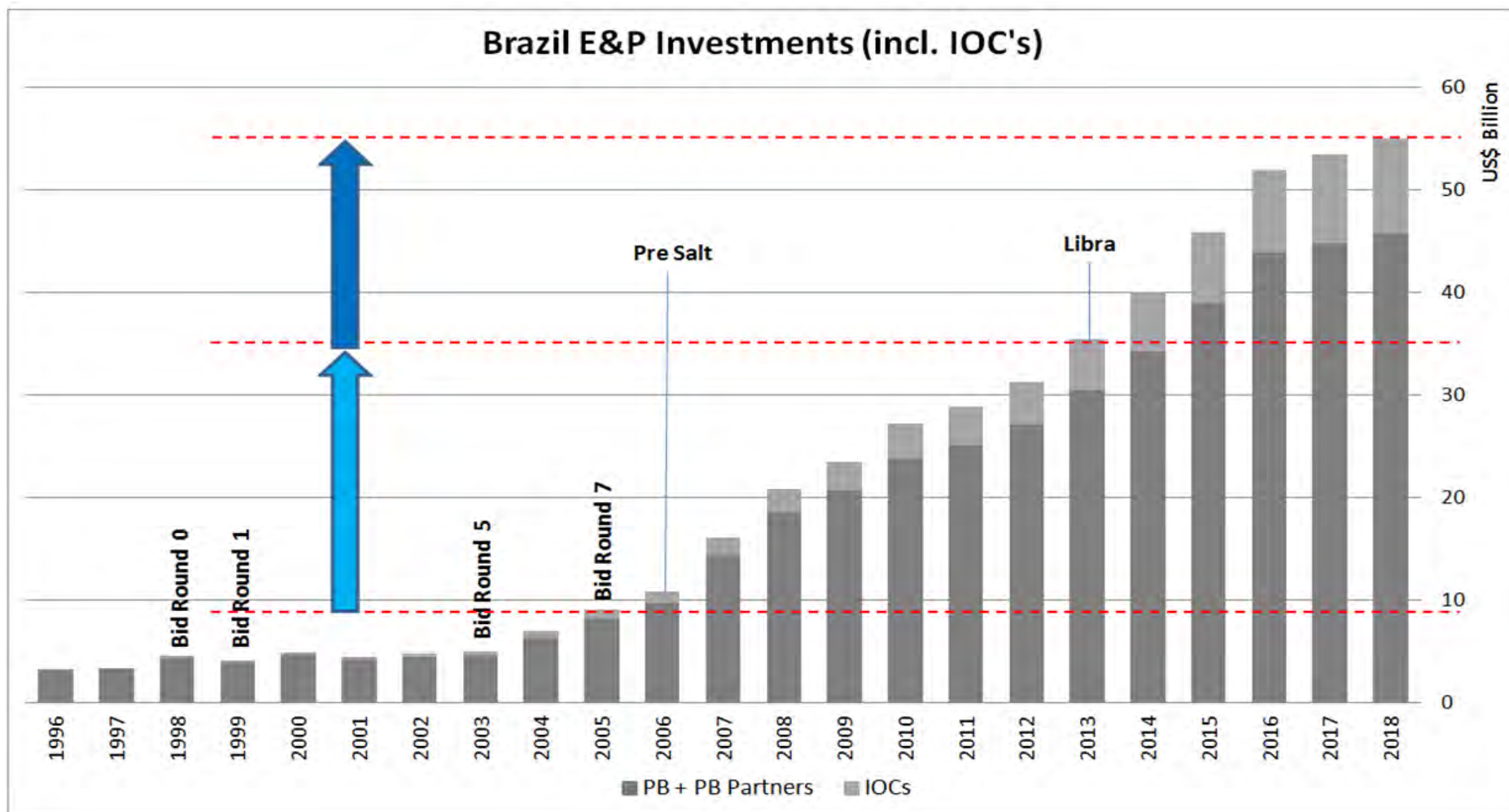
Oil & Gas	458	42%
Mining & Quarrying	48	4%
Automotive	74	7%
Paper & Cellulose	19	2%
Petrochemical	25	2%
Steel	10	1%
Electronics	26	2%
Health	13	1%
Aerospace	9	1%
Others	418	38%
Total	1.100	

Fonte: BNDES

Another view



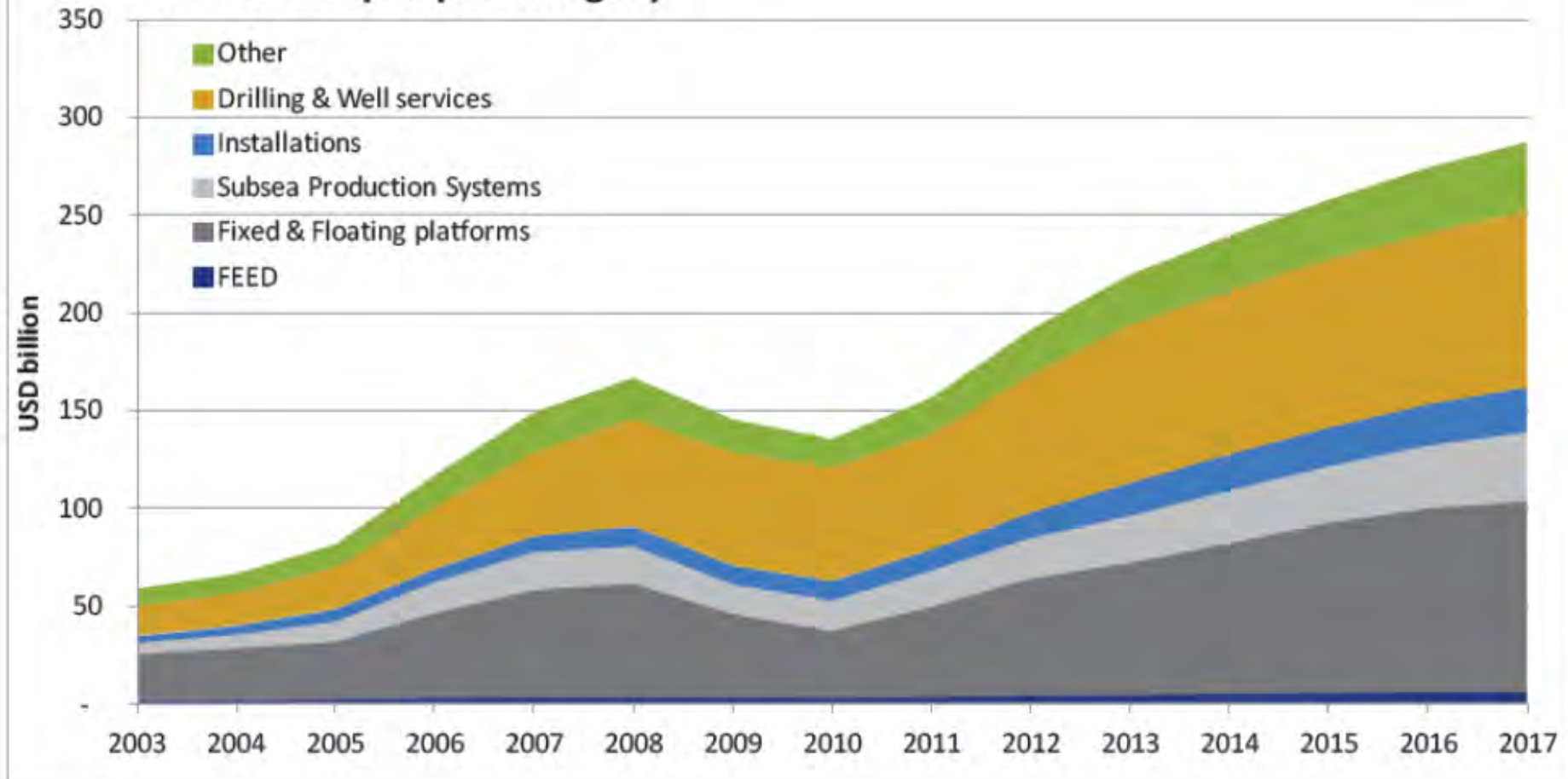
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THE “BIG MONEY” IN OFFSHORE CAPEX GOES TO DRILLING AND PLATFORMS



Offshore Capex per category



Source: IHS CERA

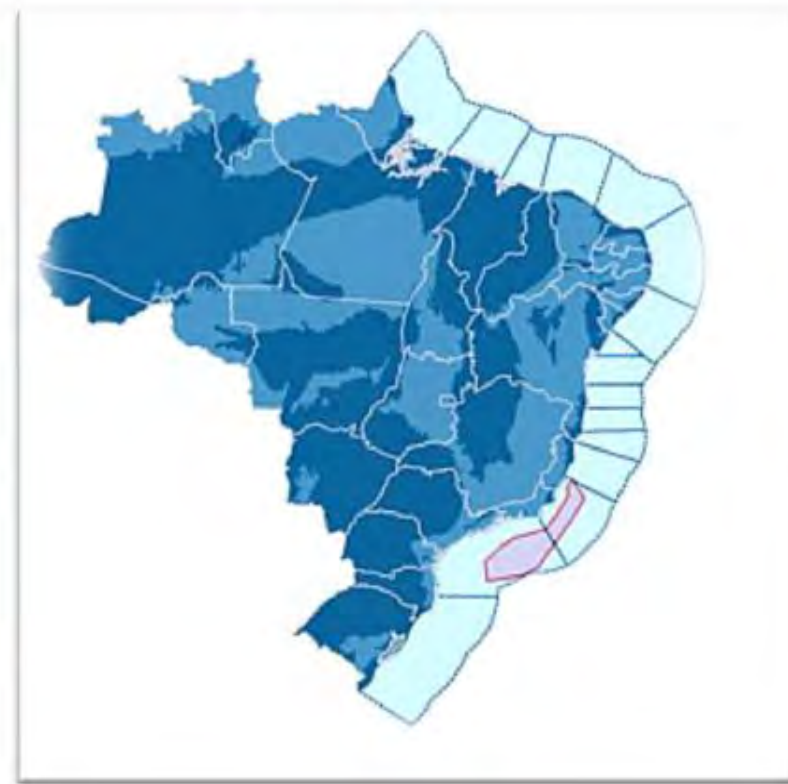
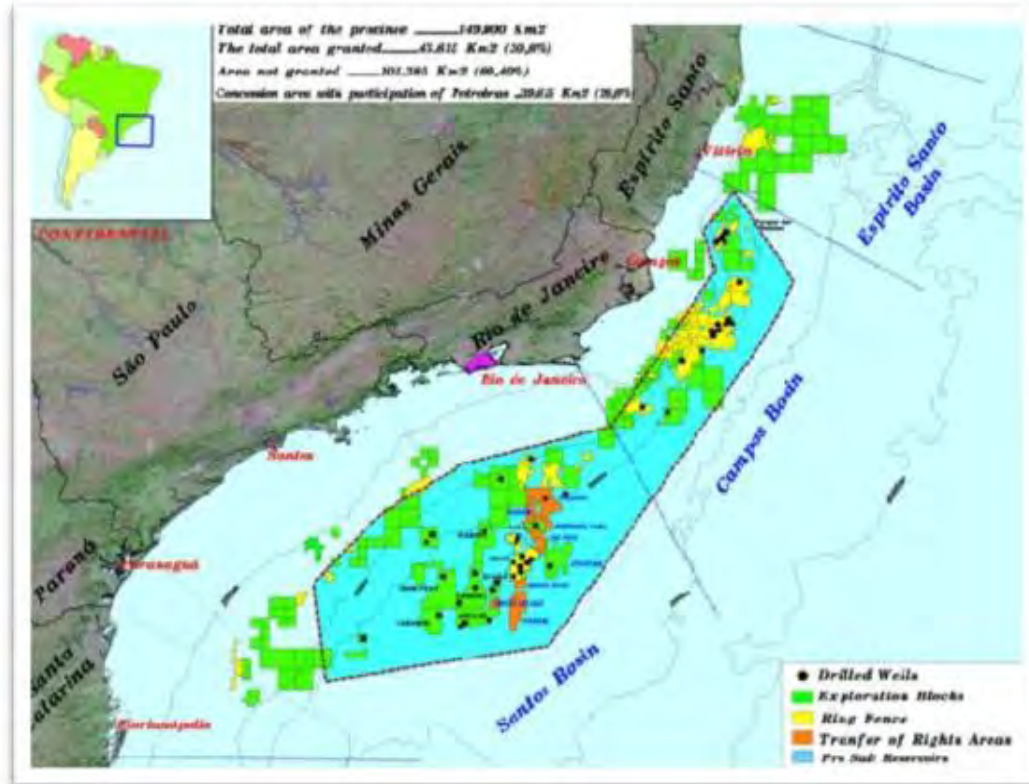


Pre-Salt

149,000 Km², high rates of CO₂ and H₂S, high production volumes and high pressures (TUPI – 9,000 psi).



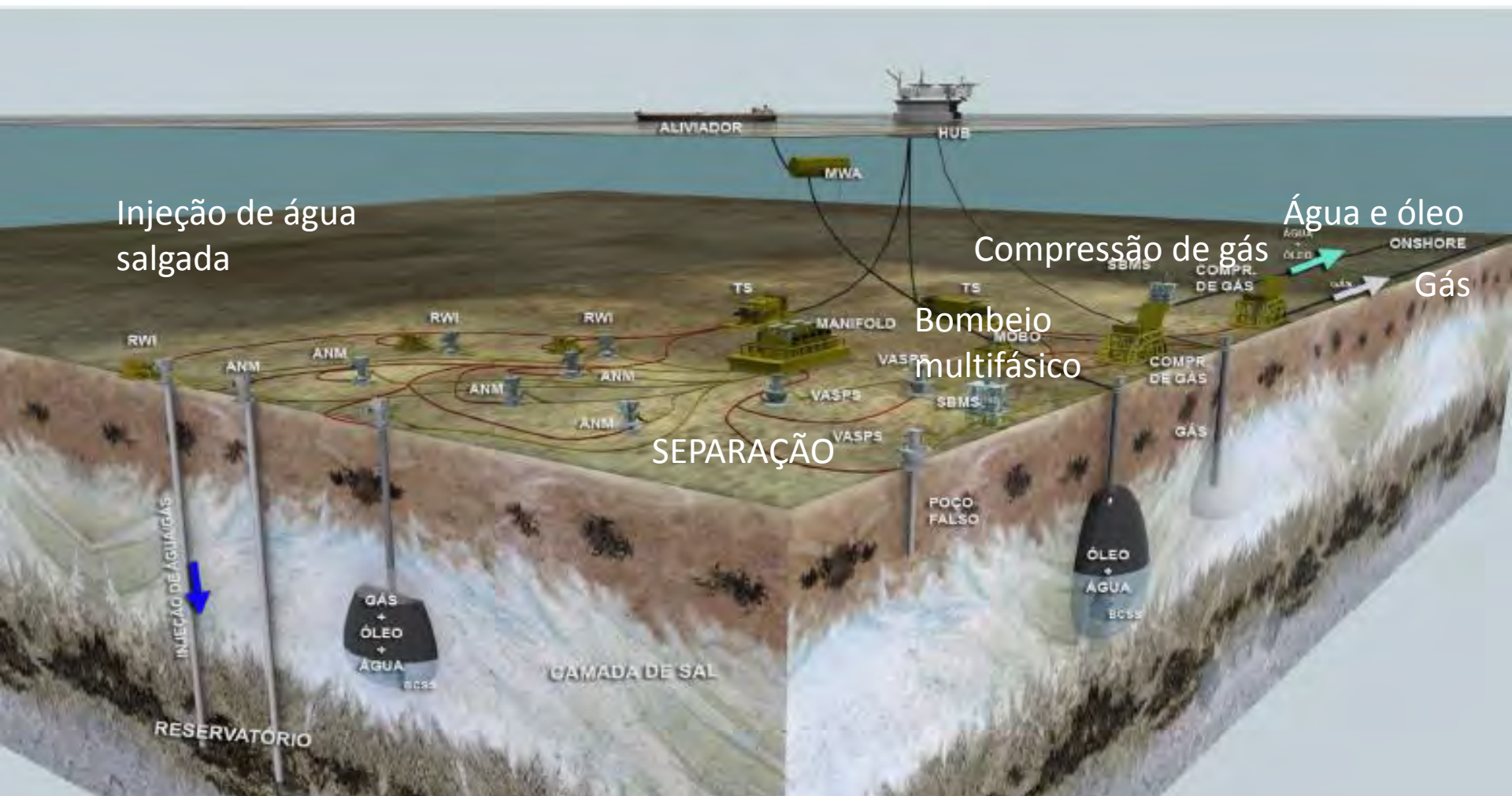
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WHY NOT ?



DIAGRAMA DE OPERAÇÃO (3D)





TECHNOLOGICAL PARK OF UFRJ



HALLIBURTON

SIEMENS



 **Tenaris**

 **PETROBRAS**
ASFALTOS


**BAKER
HUGHES**


VALLOUREC & MANNESMANN TUBES
V & M do BRASIL


BG Group

EMC²
where information lives

FMC

Schlumberger

USIMINAS 

Other Companies with development plans for technological centers in Brazil:

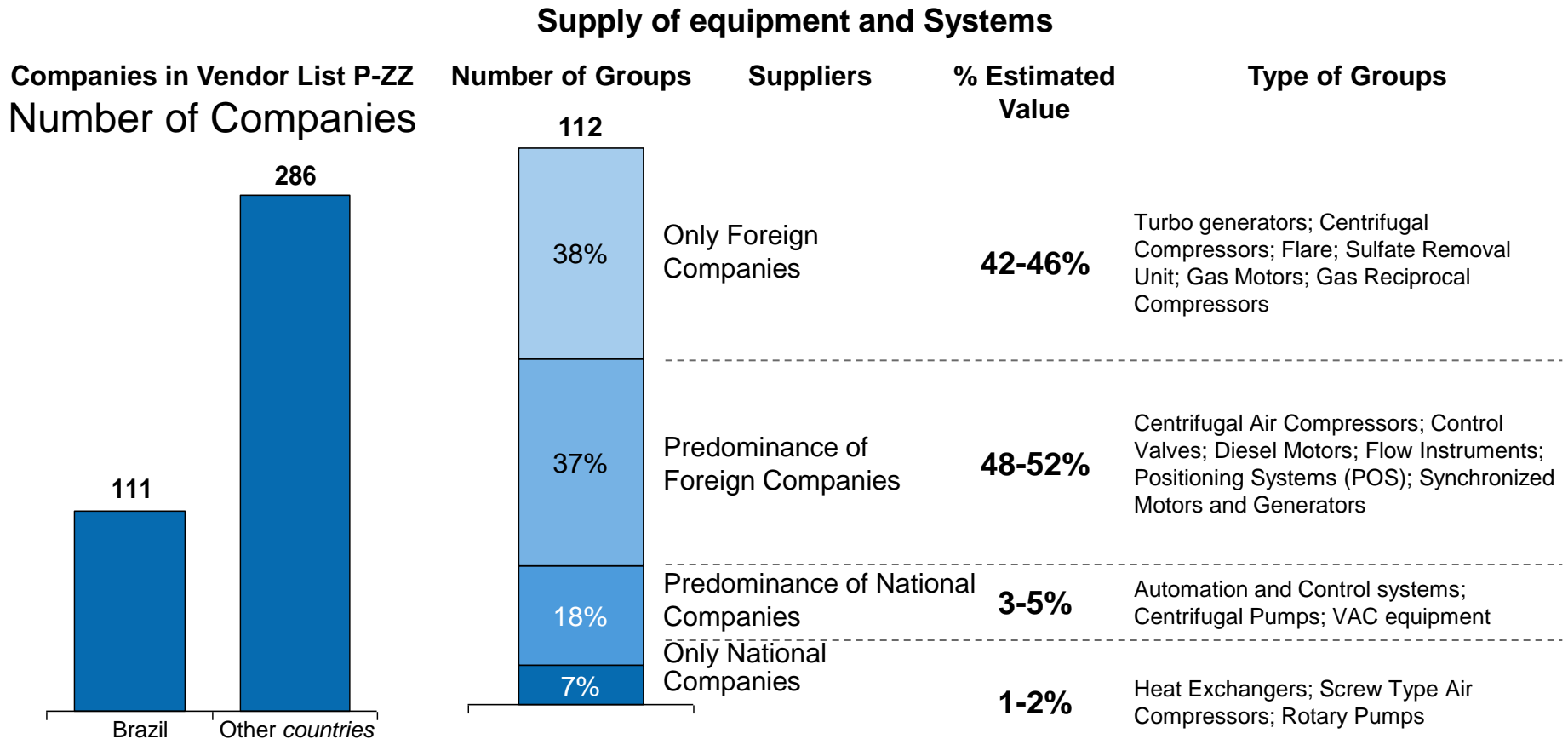
- Cameron
- IBM
- Technip
- Weatherford
- Wellstream



The P-ZZ⁽¹⁾ vendor list indicates the national chain growth potential – about 40% of the equipment groups have not been considered local suppliers



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1)Recent platform
Source: Booz & Company Analysis

Local Content - The offshore supply chain is quite broad, covering a large number of segments



¹ Includes all materials and equipment for which the offshore chain is unrepresentative, thus staying out of the main supply chain

OTC Names 2015 Award Recipients

Posted by Eric Haun

Tuesday, February 03, 2015

The 2015 Offshore Technology Conference (OTC), to be held May 4–7 at NRG Park, will kick off on Sunday, May 3 in Houston with the Annual OTC Dinner to honor the recipients of this year's Distinguished Achievement Awards, this year recognizing Elmer (Bud) Danenberger III for individual achievement, the Petrobras pre-salt development for corporate achievement, and Ray R. Ayers with the Heritage Award.

The OTC Distinguished Achievement Award for Individuals will honor Elmer (Bud) Danenberger III for his contributions to offshore safety and environmental protection. Danenberger held a 38-year career with the U.S. Department of the Interior in the offshore oil and gas program. He initiated the MMS industry awards program and coauthored legislation leading to offshore renewable energy and

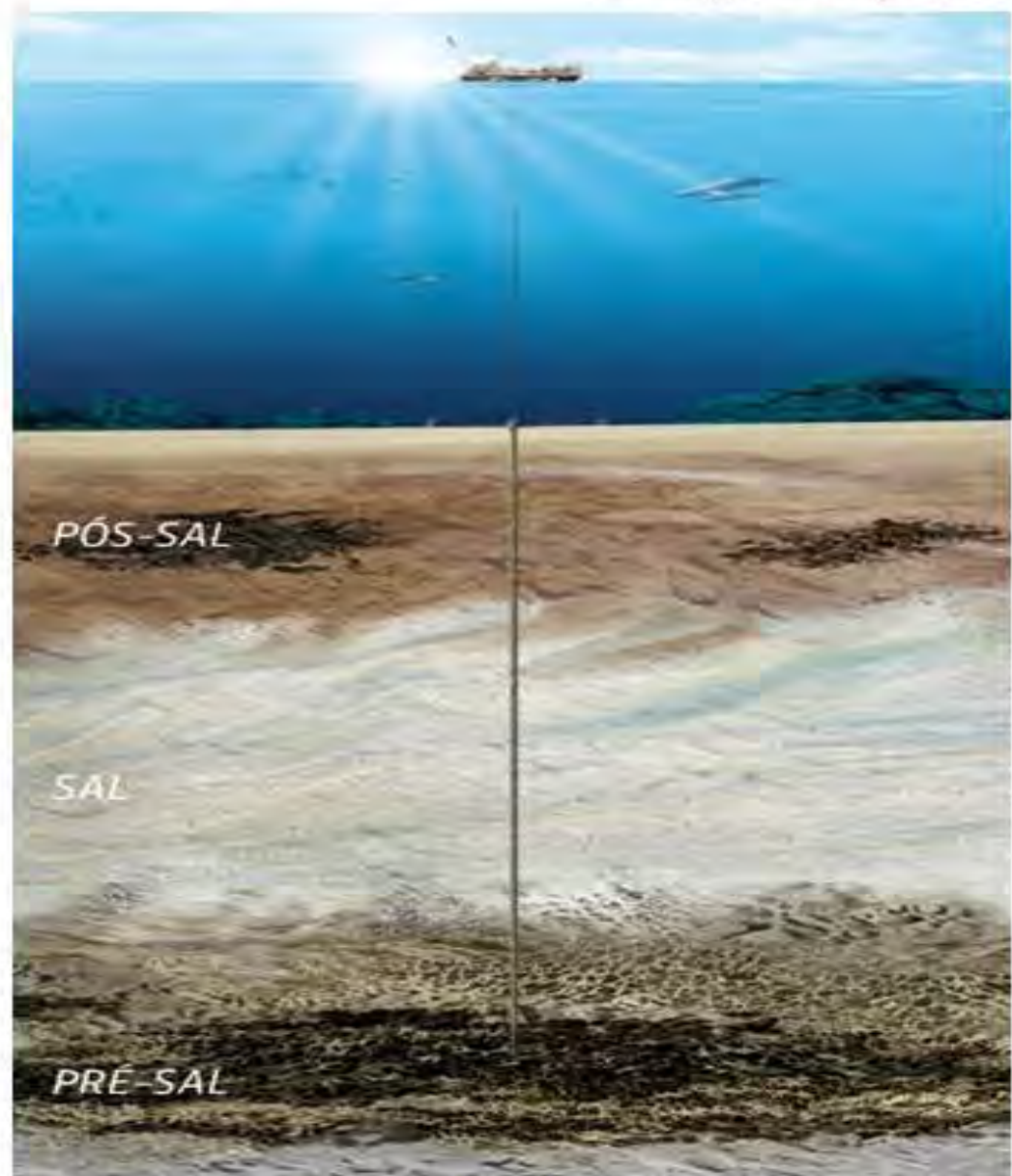


Image courtesy of Petrobras

PRODUÇÃO MÉDIA MENSAL DE ÓLEO (MIL BPD)

PRODUÇÃO ACUMULADA
31 Dez 2014

501 milhões de boe





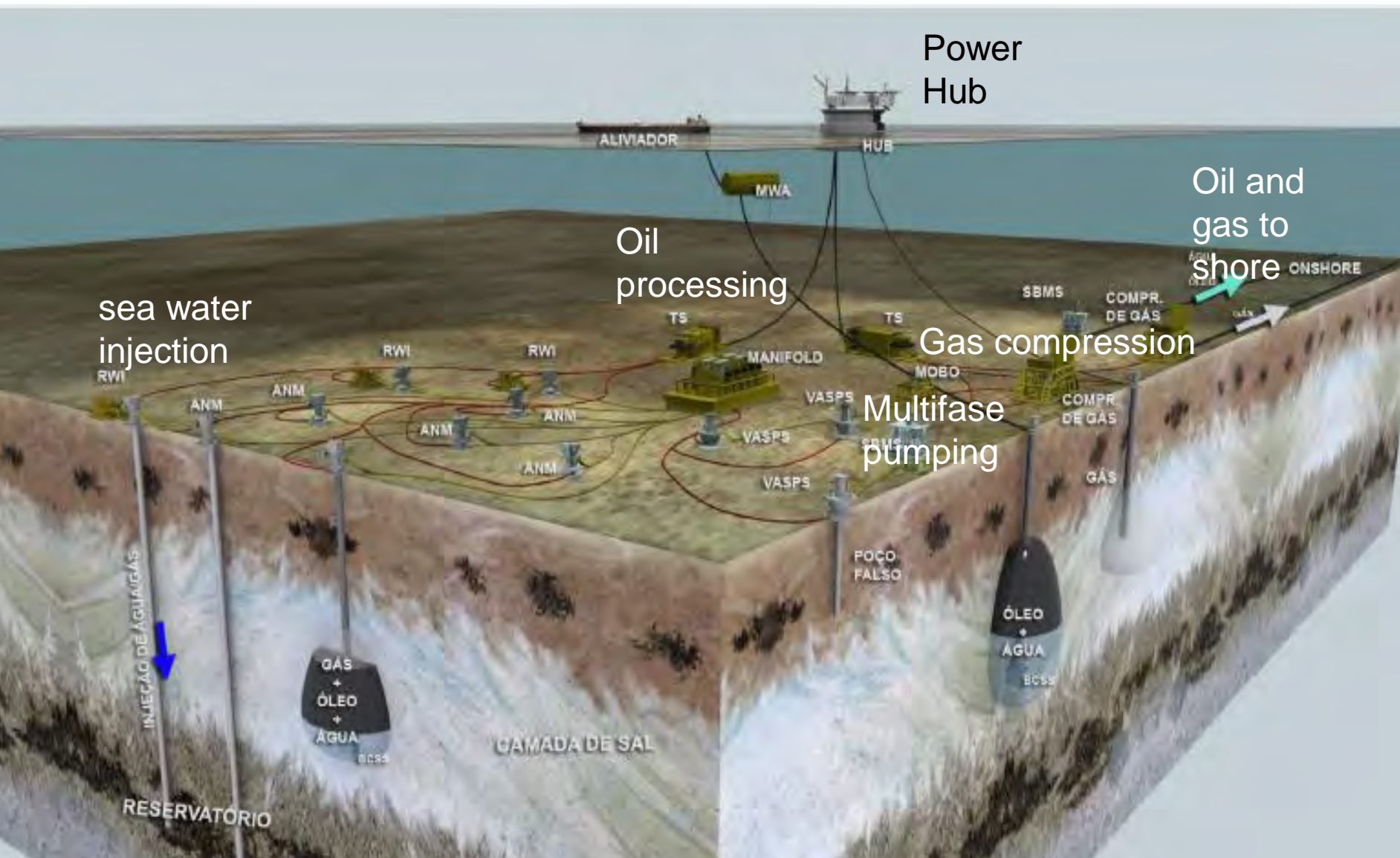


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1. First float risers sustaining (BSR)



DIAGRAMA DE OPERAÇÃO (3D)



Sistema Integrado de Produção Submarina

Sistema Integrado de Produção Submarina

CONSELHO DELIBERATIVO DO PROGRAMA DE INOVAÇÃO CONTEÚDO LOCAL
ANP
IBP-OPERADORAS
PETROBRAS
ONIP

EMBRAPII

COPPE, CIMATEC, IPT, INT
(PUC-RJ), UFRGS(LEMOT)...

MCTI

PLATAFORMAS DO CONHECIMENTO

INOVA PETRO

FINEP, BNDES,
PETROBRAS

ANP-ONIP

ENGENHARIA BÁSICA
CLÁUSULA

SEBRAE/ONIP/APEX

TRANSFERÊNCIA DE
TECNOLOGIA
INTERNACIONALIZAÇÃO

ABDI

ATS
ONIP

CLUSTER SUBSEA-RJ

RIO-SEDEIS
ONIP
MDIC
INTERNACIONALIZAÇÃO

Conclusions



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- The petroleum sector is crucial for Brasil's economical development;
- The country is one of the most dynamic markets in the world today;
- Opportunities cover all business sectors;
- The size of CAPEX is getting all the attention but OPEX is already very attractive and will grow along time;
- The presence of a solid industrial base in Brasil should be considered; local content could be an ally rather than an obstacle;
- Offshore architecture will change; new technologies, new challenges and new opportunities;
- Aggregating local content whenever possible is always a good strategy;

Thank you



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