

Infield Systems has just released the latest edition of its **Offshore Latin America Oil and Gas Market Report to 2017**. This latest report provides a detailed forecast, including oil and gas capital expenditure projections and number of installations, for each of the main sectors in the offshore oil and gas industry, including: fixed platforms, floating production systems, subsea production units, pipelines and control lines; whilst also providing an overview of the demand and supply for vessels in the Latin American region, as well as an assessment of potential deepwater activity.

The Latin American region contains some of the world's largest hydrocarbon reserves. Whilst the largest proportion of the region's reserves are located in Venezuela, Mexico has significant (but mature) shallow water deposits and Brazil arguably holds the greatest production potential with its vast deepwater hydrocarbon deposits in the Santos and Campos basins. The Latin American region is dominated by National Oil Companies (NOCs) which include Petroleos de Venezuela (PdVSA), Petroleos Mexicanos (PEMEX) and Petróleo Brasileiro S.A. (Petrobras).

Brazil's NOC Petrobras is in the fortunate position of owning the mineral rights to some of the largest deepwater hydrocarbon deposits in the world. However, exploiting these remote, ultra-deepwater reserves is a capital intensive task. In March 2013, the NOC announced its 2013-17 investment plan, with the budget unchanged from the previous 2012-16 plan. The key difference was the increase in spend on drilling, subsea, platforms and vessels by 4% to account for 62.3% of planned total capital spend.

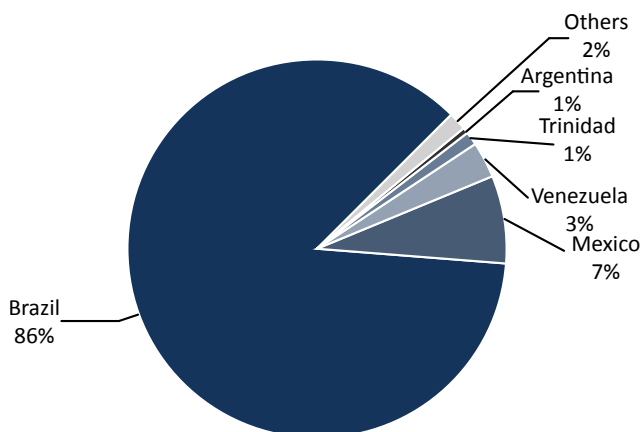
pre-salt developments forming the cornerstone of the NOC's plans, to continue to dominate the region's offshore profile. Key capital intensive developments for Brazil are expected to include the multi-phase Franco and Lula developments. Elsewhere, Infield Systems expects development to increase offshore Mexico, with key developments expected to include the shallow water Ayatsil field and the deepwater Lakach and Noxal developments.

The third largest destination for offshore Capex is expected to be Venezuela. Here, state operator PDVSA retains a stronghold within the industry, although Infield Systems expects operators Eni, Repsol, Chevron and Statoil to also make investments offshore Venezuela during the forthcoming five years.

Overall, Petrobras is expected to hold a 76% share of expenditure within the Latin American region over the 2013-2017 period, whilst a further 30 operators are expected to direct Capex towards the Latin American offshore market during the period. OGX was expected to be the most significant non-NOC operator, although with the company undergoing significant financial difficulties over the last year, the strength of OGX's position within the region's future offshore market remains uncertain. Among foreign operators, Infield Systems expects Anadarko to lead capital expenditure, with the ultra-deepwater Wahoo field, located within the Campos Basin, expected to be the sole destination for the Independent's expenditure during the 2013-2017 timeframe. Key IOCs include Shell, with its largest field being Zaedyus offshore Guinea (French Guiana) and Total, expected to direct investment towards its Vega field, offshore Argentina and the ultra-deepwater Xerelete, Brazil.

In terms of market sectors, Infield Systems expects the pipeline market to form the largest share of demand at 33%, of which Brazil is expected the majority share. Key developments anticipated to demand substantial pipeline expenditure during the period include the Lula Central-to-shore line and Cernambi gas field-to-shore installation. The second largest market for operator Capex in the region is expected to be the platform market. Infield Systems currently expects the most capital intensive platform development to be the Lula FLNG; whilst the Jupiter FPSO, to be installed in water depths of 2,187 metres is also expected to demand significant Capex.

The subsea market is anticipated to account for a 30% share of regional Capex during the forecast. The primary fields driving subsea expenditure offshore Brazil include phase 1 of the Franco development and Lula Northeast. Mexico is expected to comprise 3% of the market with key fields including Lakach, which is expected to be completed before the end of 2015. Despite the subsea market being expected to remain overwhelmingly dominated by Brazil, significant expenditure is also expected on a total of six fields offshore Trinidad, whilst Venezuela and the Falkland Islands are also among the countries expected to demand subsea Capex during the period to 2017.



Latin America Capex (%) by Country 2013-2017

Source: Infield Systems' Latin America Oil & Gas Market Report to 2017

Mexico's newly elected President Enrique Peña Nieto has pledged to introduce sweeping changes to the country's energy industry in order to reduce the tax burden on state-run Pemex and reverse nearly a decade of declining oil and gas production. President Peña Nieto's party, the Institutional Revolutionary Party (PRI), voted in March 2013 to end its opposition to constitutional changes that would open the industry to greater competition and possibly an equity listing in line with the Petrobras or Statoil model. Indeed, unless Pemex is able to access greater levels of investment and technological expertise – most likely from foreign industry players – to unlock its deepwater oil potential, Mexican production decline is likely to continue and it is likely to become a net importer in the near future.

With 86% of the region's Capex expected to be directed towards Brazilian developments over the forthcoming five years, Infield Systems anticipates Petrobras-led projects, with capital intensive

Report Contents

- **Executive Summary** provides an overview of the Latin American offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the market.
- **Global Market Overview** provides an overview of current economic conditions in both developed and emerging markets, oil price trends and field sanction points, offshore production and reserves, as well as key industry trends, including the impact of unconventional and the growth of LNG on the global market.
- **Sector Analysis and Forecasts:**
 - **Fixed Platforms** provides an overview of the fixed platform market followed by a detailed discussion of key operators and developments. In-depth analysis of fixed platforms by country, by type (Piled, Gravity/Jack-up, Caisson), by water depth and by weight band is also provided.
 - **Floating Production Systems** contains a market overview as well as a detailed forecast for the FPS market, including Capex and number of installations by operator, by country, by type (Semi-Submersible, FSO, FPSO, TLP, Other Floaters), by water depth and by build. Key developments are also discussed.
 - **Subsea** includes a sector overview as

well as a detailed forecast for the Subsea market, including Capex and number of installations by operator, by country, by sector (Equipment, Drilling & Completion) and development type (Subsea Tree, Subsea Separation, Manifold, BOOSTER pUMP, Plet), and by water depth. Key developments are also discussed.

- **Pipelines and Control Lines** provides an overview of the sector and the key operators and developments. Further detailed analysis is then provided about pipelines by country, by market segment (Trunk/Export Lines, SURF, Conventional), by water depth, by material and by diameter, whilst control lines are reviewed by country and by type.
- **Deep and Ultra-Deepwater** looks at the outlook for deepwater development in the region, including Capex projections by operator, by country and by sector (Platforms, Subsea, Pipelines and Control Lines). Key deepwater developments are also discussed.
- **Specialist Vessels** provides in-depth forecasts for regional vessel demand (vessel days) and supply (units), including contract awards, for the major markets - Pipelay, Heavy Lift, Multifunctional (IRM, Construction Support) and Accommodation.

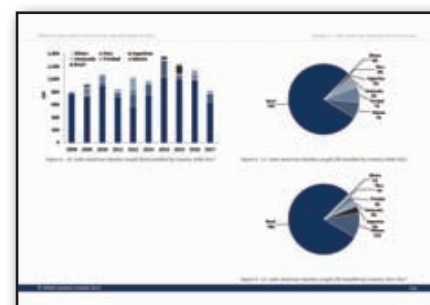
Why You Should Buy This Report

- The report contains data developed by Infield Systems' market modelling process, OFFPEX, which is based on a unique "bottom up approach" to forecasting. OFFPEX's component by component and project by project forecasting process is robust and has a proven track record.
- The reader is given a comprehensive presentation of the offshore market in the Latin American region with commentary and detailed analysis covering the macro economic climate right through to analysis by country and operator in terms of both Capex and number of units forecast to be installed.
- Detailed sector analysis appraising the variances in regional and country drivers for the Latin American offshore oil and gas market, providing insight into the trends expected within the market over the next five years.

Global & Regional Perspectives Market Reports

Infield Systems publishes a range of market reports covering various aspects and regions of the oil, gas, renewable energy and associated marine industries. Utilising comprehensive in-house project databases, industry models and research capacity these reports are widely used by industry analysts and professionals:

- Deep & Ultra-deepwater
- Subsea
- Pipelines & Control Lines
- Fixed Platforms
- Floating Production Systems
- Offshore LNG
- Specialist Vessels & Accommodation
- Subsea Well Intervention
- Remotely Operated Vehicles
- Africa
- Arctic
- Asia
- Australasia
- Europe
- Latin America
- Middle East & Caspian
- North America



About This Report

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Number of Figures:	271
Number of Tables:	87

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Online Database

Purchasers of the Regional Perspectives Offshore Latin America Oil and Gas Market Report To 2017 receive 12 months access to a database of fields being planned or considered for development in the current year and four years forward, offshore Latin America, via the InfieldLive Data Portal. InfieldLive is continually updated and purchasers receive the following information about each offshore field:

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- Field Production Rates
- Location
- Development Type
- Water Depths
- Project Status
- Depletion Date /Year

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