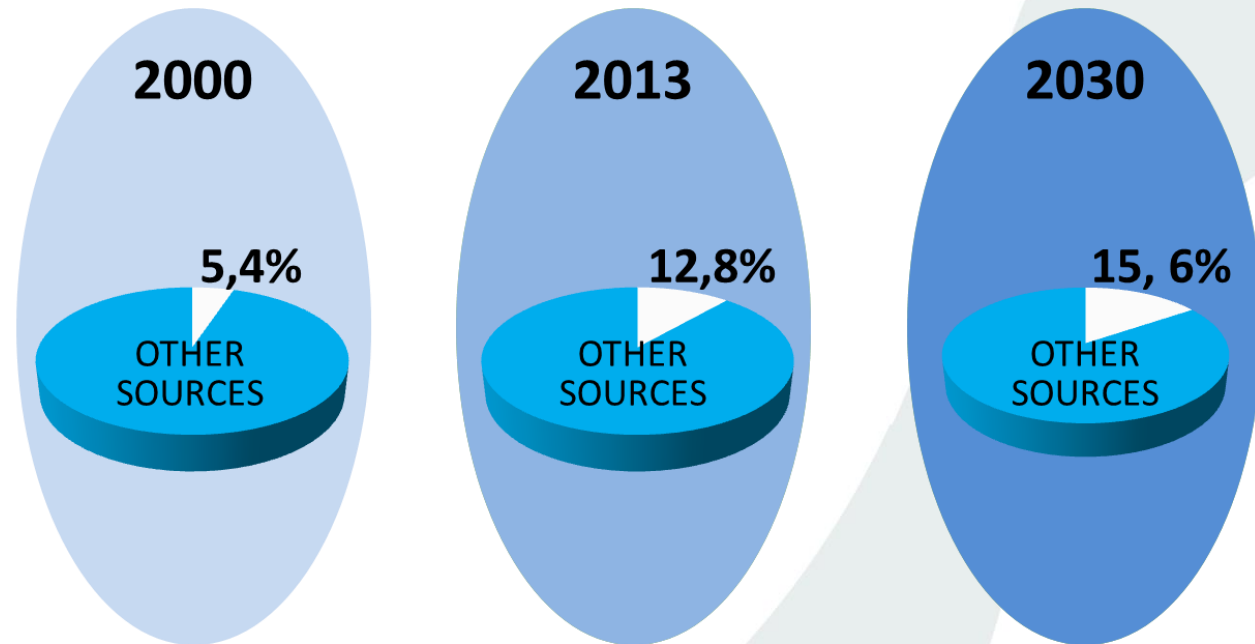




Brazil: priority to natural gas

The growing importance of natural gas in Brazil's energy mix.

The share of natural gas has more than doubled over the past decade, increasing from 5.4% in the year 2000 to 12.8% in 2013.

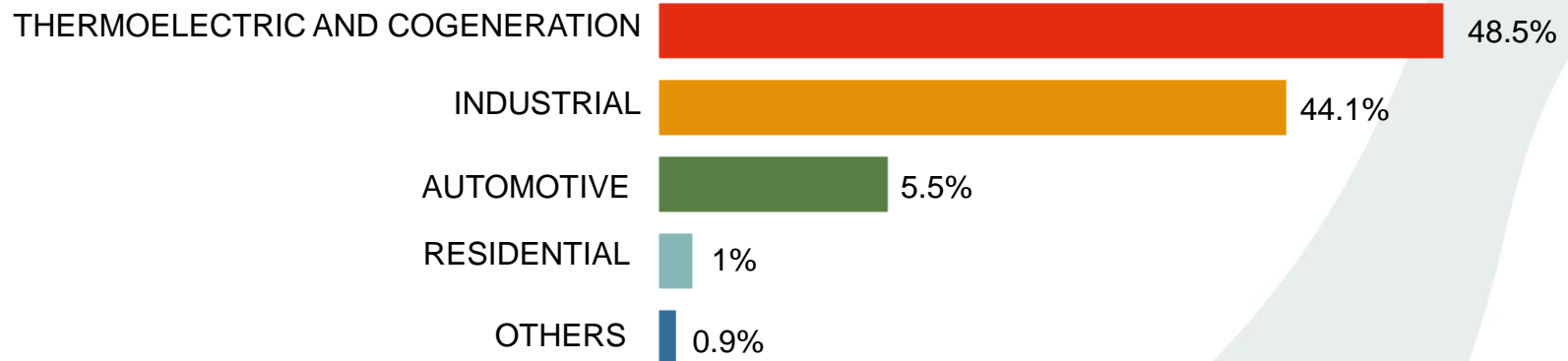


Source: ANP

A complete gas value chain

Gas share by segment

Integrated natural gas chain accelerates the expansion of consumption in all segments

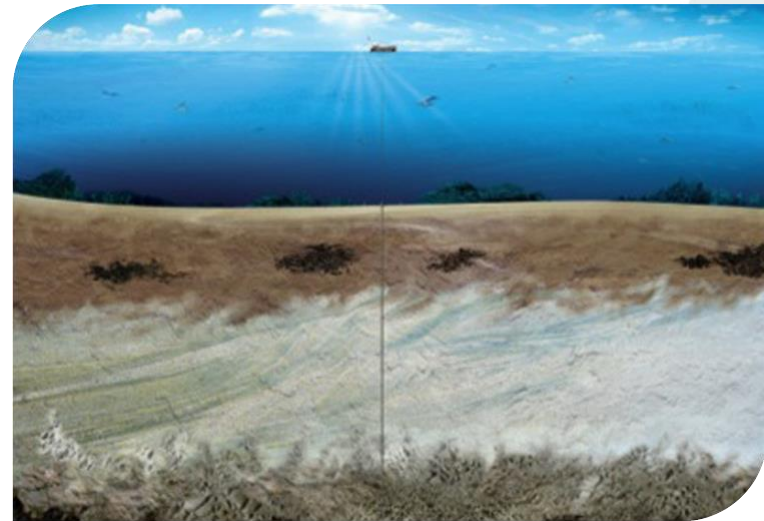


Source: ANP

Reserves may double with the pre-salt fields

Whether proven or probable, total reserves amount between 430 billion m³ and 900 billion m³ of gas.

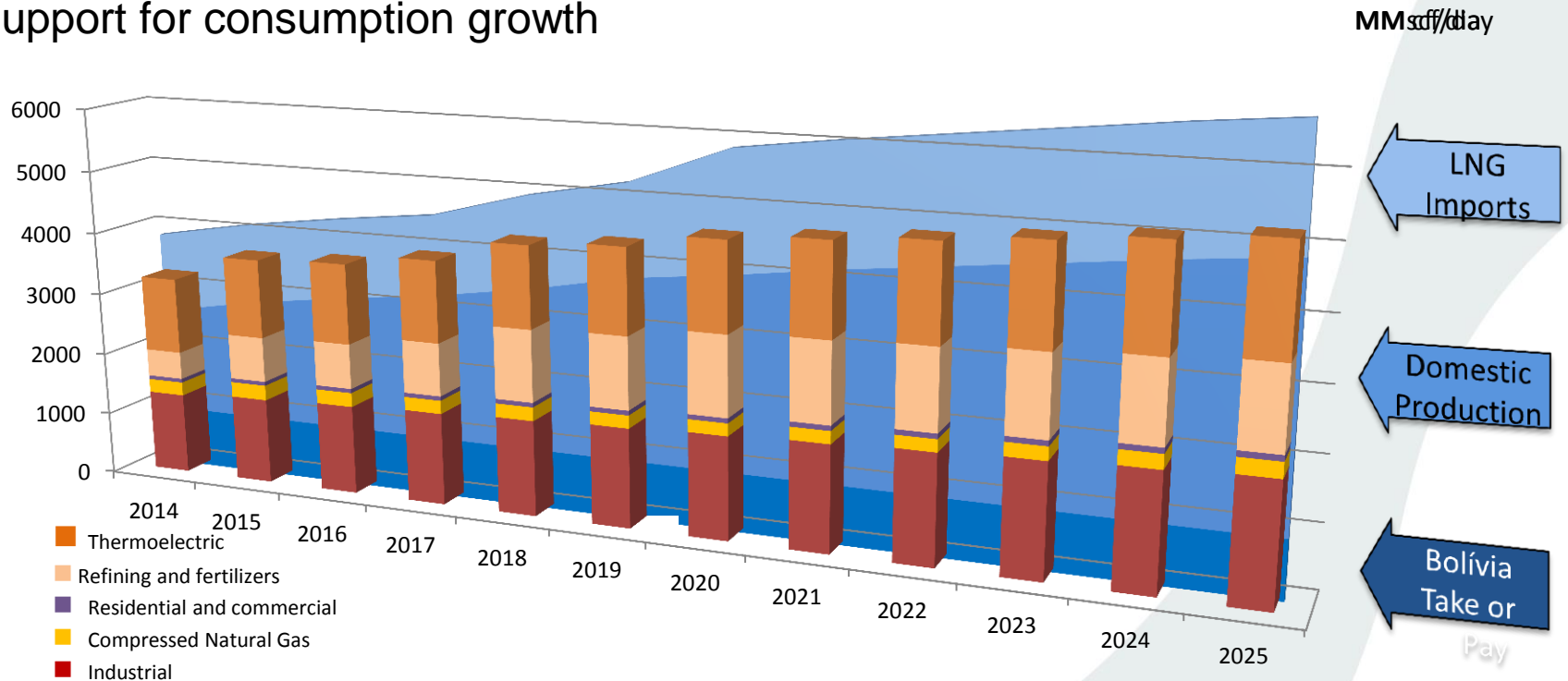
Oil reserves have also doubled from 14 billion to an estimated 30 billion barrels.



Source: ANP / Petrobras

Gas Balance - LNG complement offer

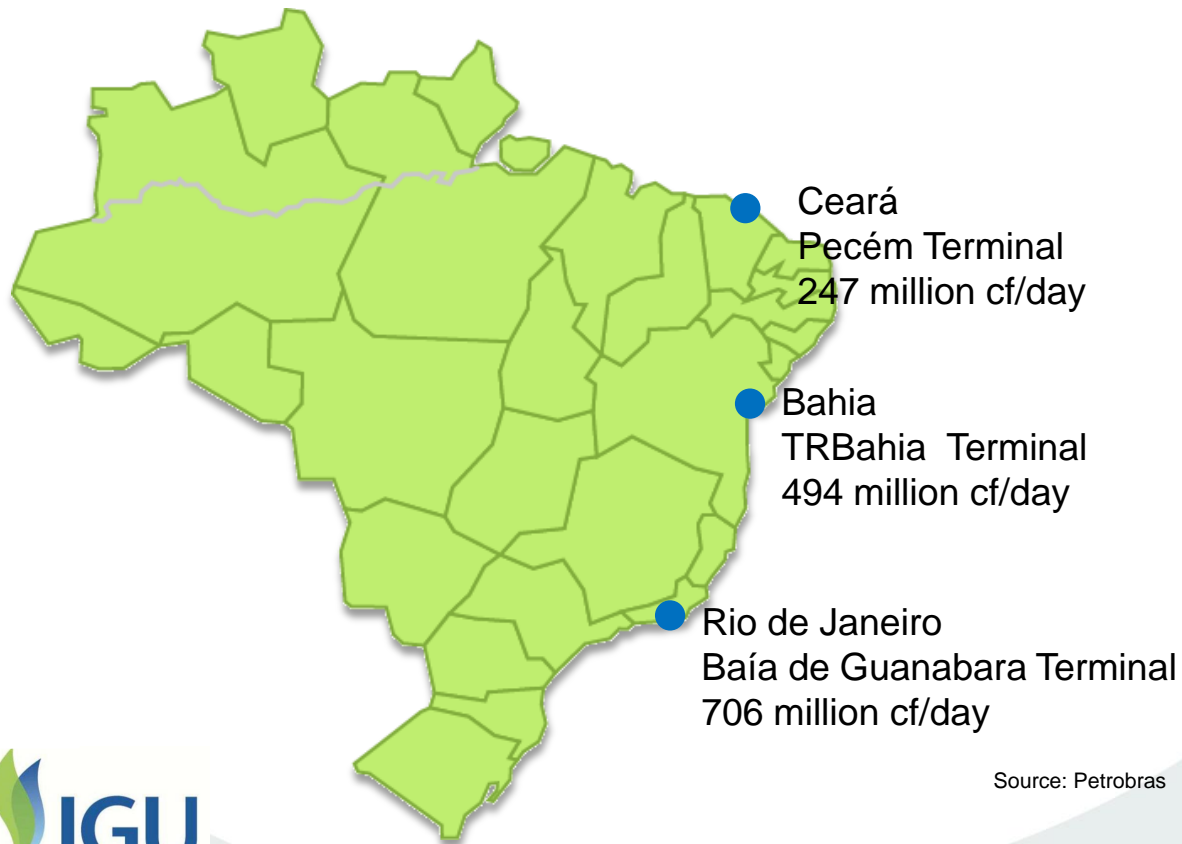
Consolidation of the integrated natural gas chain will provide support for consumption growth



Source: IBP

Expansion of LNG receiving facilities

Potential for increasing LNG Regasification terminals in strategic locations



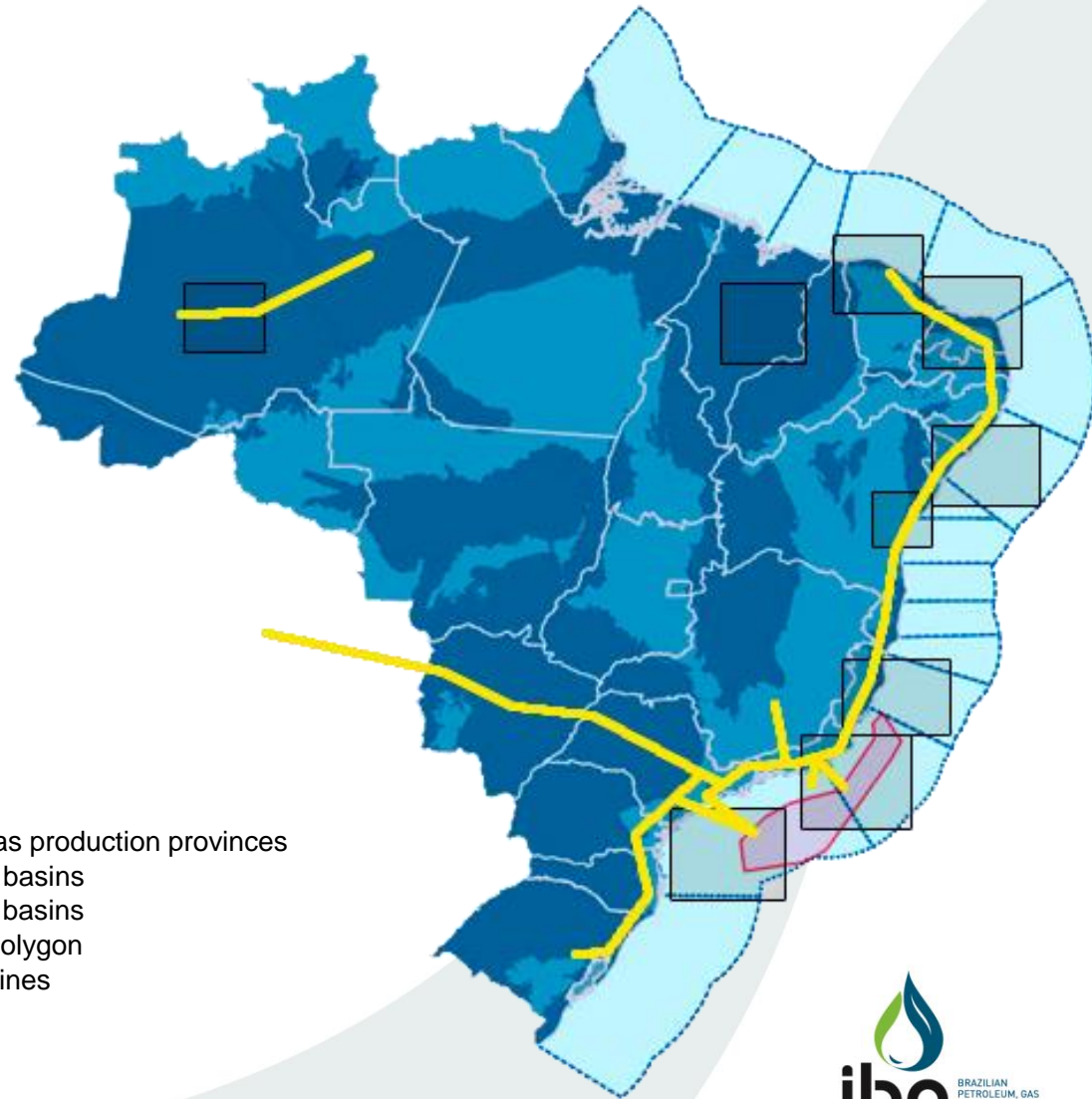
Source: Petrobras

Growth prospects

Sedimentary basins

- 38 sedimentary basins
- 9 provinces producing oil and gas
- ~ 7.5 million km² of basins (only 4.5% contracted)
- 9.244 Km of gas pipelines

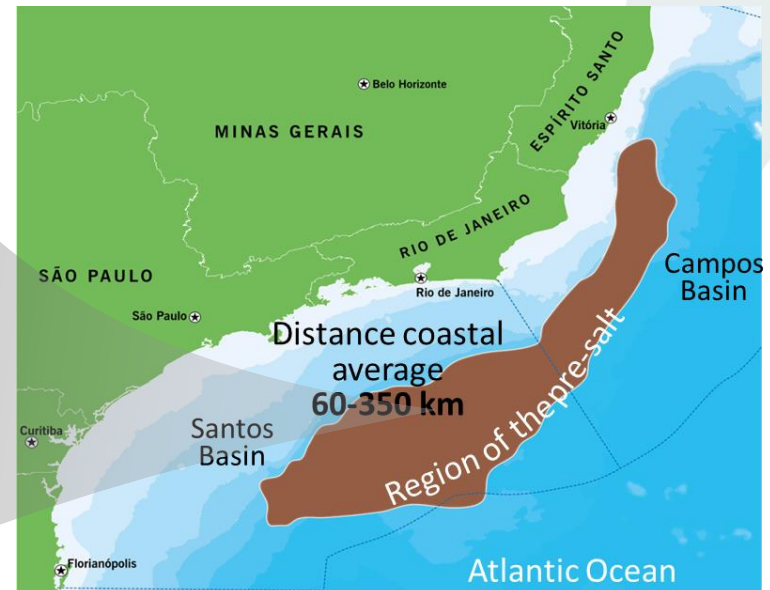
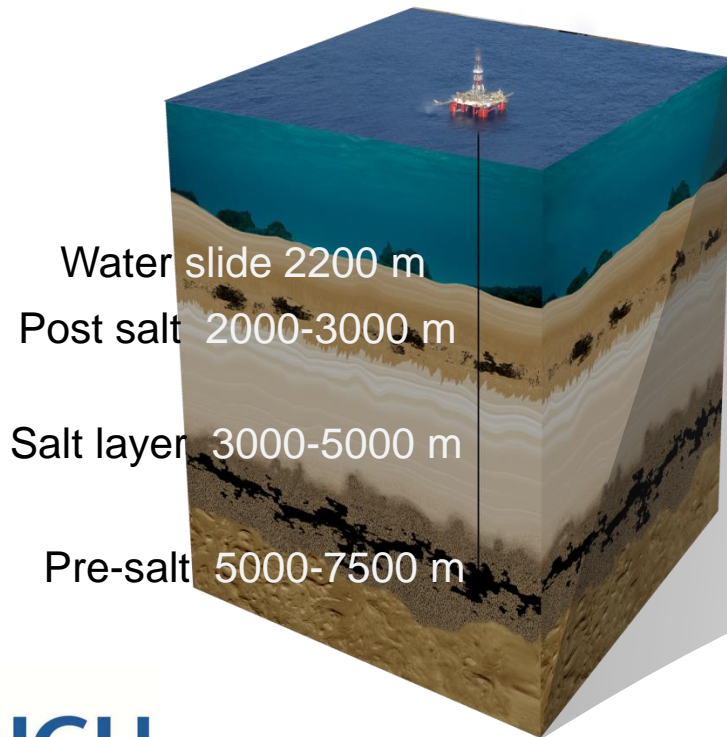
- Oil and gas production provinces
- Onshore basins
- Offshore basins
- Pre-salt polygon
- Gas pipelines



Growth prospects

Ideal environment to host the event

The Brazilian E&P industry has enormous technological challenges to surmount in the exploration and development of production in the pre-salt areas.

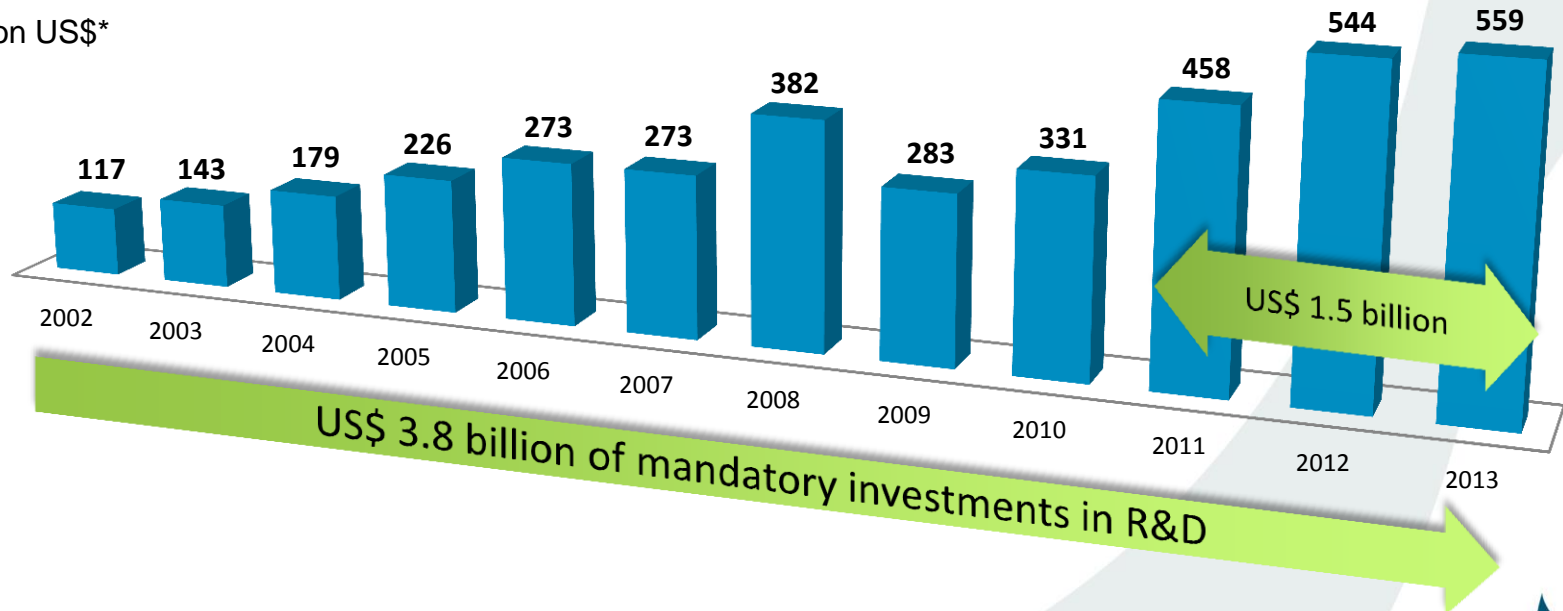


R&D investment in last decade

US\$ 3.8 billion of mandatory investments in R&D

The funds related to investments in R&D, as stipulated in concession contracts, have increased by more than 460% over the past ten years.

Million US\$*

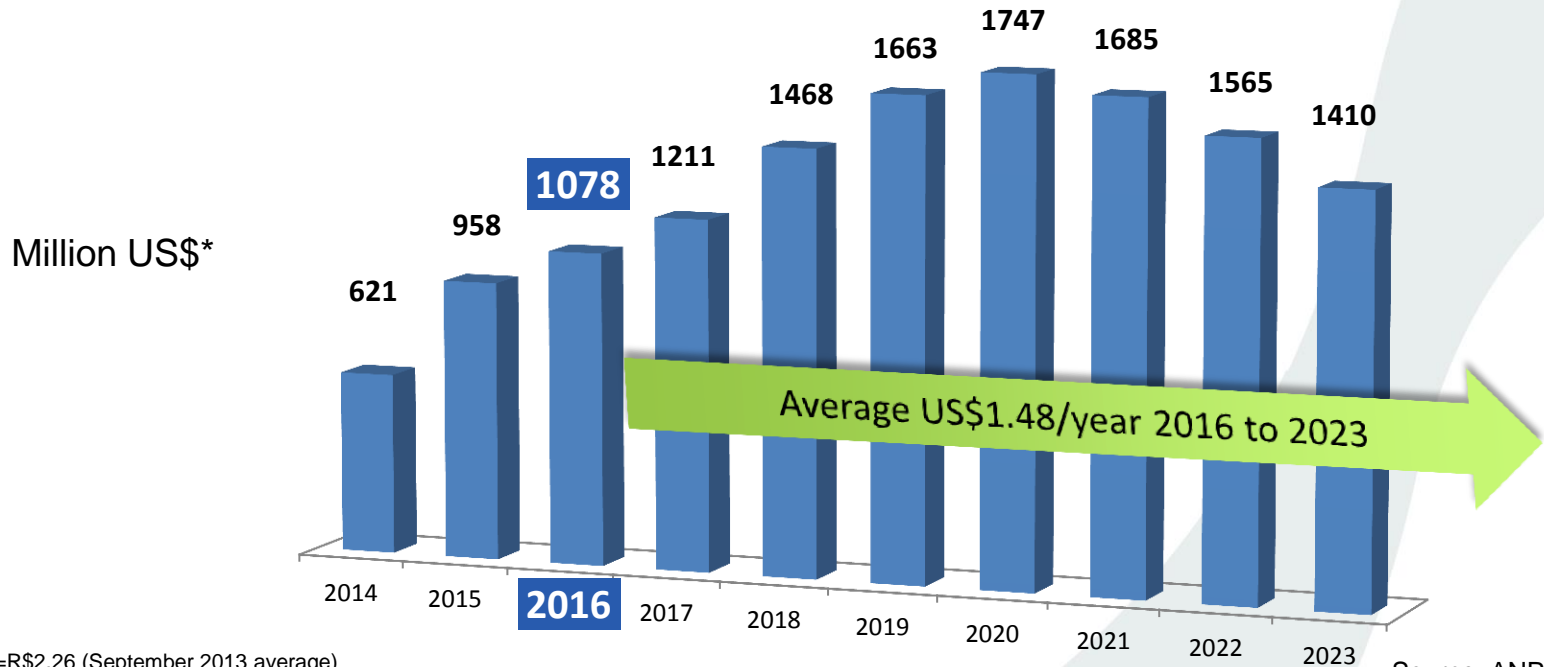


Source: ANP/SIGEP

Growth R&D investment prospects

Annual investments of over US\$ 1 billion for universities, institutes and R&D.

ANP studies forecast that investments will exceed US\$ 1 billion as from 2016, with annual average investments of US\$ 1.48 billion until 2022.



* US\$1=R\$2,26 (September 2013 average)

Source: ANP/SIGEP

The forecast E&P investments from Pre Salt production had not been included in this figure.



The Brazilian Petroleum, Gas and Biofuels Institute (IBP) organizes the Rio Oil & Gas Conference & Expo every two years. It set various records in 2012:

- Conference participants – 4400
- Exhibitors – 1300
- International pavilions – 14
- Technical studies presented – 586
- Visitors – 53086
- Exhibition area – 39500 m²
- Countries represented – 27
- Journalists – 300





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