

The West African Oil & Gas Market 2013-2023

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Abstracts

The West African oil & gas market is experiencing a period of strong growth, with significant exploration and production activity taking place in the region's offshore fields. The similarities between the pre-salt reserves in Brazil and West Africa is generating renewed interest in the latter's oil & gas market, while high oil prices are enticing companies to invest in deepwater E&P. This will lead to substantial growth over the coming decade, creating opportunities for companies involved in the region's oil & gas market. Visiongain's analysis shows that capital expenditure in the West African oil & gas market will total \$21.30bn in 2013. This includes spending on exploration and production projects, as well as oil & gas infrastructure projects, such as refineries, pipelines, LNG and GTL facilities.

The 8 West African countries profiled in the report are Angola, Cameroon, Cote d'Ivoire, Equatorial Guinea, Gabon, Ghana, Nigeria and the Republic of the Congo.

Though plagued by political and security concerns, the West African region possesses considerable oil & gas reserves which have been exploited for a number of decades. The more established Nigerian and Angolan markets will continue to dominate spending, though newer oil & gas producers such as Ghana will see the most impressive growth rates. Oil production will increase in most West African countries over the coming decade, while several nations have the potential to construct major LNG export facilities as global demand for gas continues to rise.

What makes this report unique?

Visiongain consulted with industry experts to identify key aspects and trends in the West African market. The report provides insight into key the drivers for, and restraints on, West African oil & gas capital expenditure. It also identifies future growth areas, analyses leading companies and provides a unique blend of qualitative analysis

combined with extensive quantitative data, including regional and national market forecasts from 2013-2023 - all highlighting key business opportunities.

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Gabon

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Nigeria

Republic of the Congo

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National oil production forecasts for the period 2012-2017

Tables detailing major upcoming oil & gas infrastructure projects, including refineries, pipelines, LNG and GTL facilities

A PEST analysis for political, economic, social and technological factors affecting the West African oil & gas market from 2013 onwards

Comprehensive information about the major companies active in the West African oil & gas market

Chevron

Eni

ExxonMobil

Royal Dutch Shell

Total S.A.

Analysis of the factors driving and restraining spending in each national West African oil & gas market

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Contents

1. EXECUTIVE SUMMARY

- 1.1 Global West African Oil & Gas Market Overview
- 1.2 Benefits of This Report
- 1.3 Who is This Report For?
- 1.4 Methodology
- 1.5 West African Oil & Gas Market Forecast 2013-2023
- 1.6 West African National Oil & Gas Markets Forecast 2013-2023

2. INTRODUCTION TO THE WEST AFRICAN OIL & GAS MARKET

- 2.1 West African Oil & Gas Market Structure Overview
- 2.2 West African Oil & Gas Market Definition
- 2.3 Critical Issues in the West African Oil & Gas Market
 - 2.3.1 Political and Security Concerns
 - 2.3.2 Economic and Energy Sector Development
 - 2.3.3 Global LNG Competition
 - 2.3.4 Changing Oil Export Outlook

3. THE WEST AFRICAN OIL & GAS MARKET

- 3.1 West African Oil & Gas Market Forecast 2013-2023
- 3.2 West African Oil & Gas Market Analysis
- 3.3 Drivers and Restraints in the West African Oil & Gas Market
 - 3.3.1 Drivers in the West African Oil & Gas Market
 - 3.3.1.1 Excitement Over Pre-Salt Reserves
 - 3.3.1.2 Increasing Global Demand for Oil & Gas
 - 3.3.1.3 Desire to Reduce Flaring
 - 3.3.1.4 Increasing Domestic Opportunities
 - 3.3.2 Restraints in the West African Oil & Gas Market
 - 3.3.2.1 High Costs of Deepwater Exploration
 - 3.3.2.2 Security Concerns
 - 3.3.2.3 Increasing LNG Competition
 - 3.3.2.4 Declining US Import Requirements
 - 3.3.2.5 Global Economic Concerns

4. WEST AFRICAN NATIONAL OIL & GAS MARKETS

- 4.1 West African National Oil & Gas Markets Forecast 2013-2023
- 4.2 West African National Oil & Gas Markets Share Forecast 2013-2023
- 4.3 Barriers to Entry Analysis
- 4.4 Angola Oil & Gas Market Forecast 2013-2023
 - 4.4.1 Political and Economic Climate in Angola
 - 4.4.2 Doing Business in Angola
 - 4.4.3 Oil & Gas Production, Consumption and Reserves
 - 4.4.4 Oil & Gas Sector Organisation
 - 4.4.5 Oil & Gas Exploration and Production
 - 4.4.5.1 Offshore Production Locations
 - 4.4.5.2 Onshore Production Locations
 - 4.4.5.3 Upcoming Production Projects
 - 4.4.5.4 Current Exploration Activity
 - 4.4.5.5 Prospects for Angola's Pre-Salt Region
 - 4.4.6 Angolan Oil & Gas Infrastructure Projects and Developments
 - 4.4.6.1 Construction of Lobito Refinery Finally Underway
 - 4.4.6.2 Angola's Delayed LNG Plant Delivers First Exports
 - 4.4.6.3 Angola Planning to Build Pipeline to Zambia
 - 4.4.6.4 US Tight Oil Production Necessitating a Search for New Markets
 - 4.4.7 Angola Oil & Gas Market Summary
- 4.5 Nigeria Oil & Gas Market Forecast 2013-2023
 - 4.5.1 Political and Economic Climate in Nigeria
 - 4.5.2 Doing Business in Nigeria
 - 4.5.3 Oil & Gas Production, Consumption and Reserves
 - 4.5.4 Oil & Gas Sector Organisation
 - 4.5.5 Impact of the Potential Petroleum Industry Bill
 - 4.5.6 Security Challenges in the Nigerian Oil & Gas Market
 - 4.5.7 Oil Exploration & Production
 - 4.5.7.1 Major Upcoming Projects Set to Increase Nigeria's Production
 - 4.5.8 Gas Exploration & Production
 - 4.5.8.1 The Future of Nigerian LNG Exports
 - 4.5.9 Nigerian Oil & Gas Infrastructure Projects and Developments
 - 4.5.9.1 Prospects for the Trans-Saharan Gas Pipeline (TSGP)
 - 4.5.9.2 Other Nigerian Pipeline Projects
 - 4.5.9.3 Nigerian Plans to Increase Refining Capacity
 - 4.5.9.4 Opportunities in Gas-to-Liquids (GTL)
 - 4.5.9.5 Problems Created by Increasing US Oil Production
 - 4.5.10 Nigeria Oil & Gas Market Summary

4.6 Equatorial Guinea Oil & Gas Market Forecast 2013-2023

4.6.1 Political and Economic Climate in Equatorial Guinea

4.6.2 Doing Business in Equatorial Guinea

4.6.3 Oil & Gas Production, Consumption and Reserves

4.6.4 Oil & Gas Sector Organisation

4.6.5 Equatorial Guinea Oil Exploration & Production

4.6.5.1 Current Production Locations

4.6.5.2 Prospects for the Upcoming Alen Field Development

4.6.5.3 Recent E&P Activity

4.6.6 Plans for a Refinery at Mbini

4.6.7 Equatorial Guinea Gas Exploration & Production

4.6.7.1 Current Production and Future Potential

4.6.7.2 Prospects for a Second LNG Train

4.6.8 Equatorial Guinea Oil & Gas Market Summary

4.7 Gabon Oil & Gas Market Forecast 2013-2023

4.7.1 Political and Economic Climate in Gabon

4.7.2 Doing Business in Gabon

4.7.3 Oil & Gas Production, Consumption and Reserves

4.7.4 Oil & Gas Sector Organisation

4.7.5 Gabon Oil Exploration & Production

4.7.5.1 Current Production Locations

4.7.5.2 Recent Exploration & Production Activity

4.7.5.3 Prospects for Pre-Salt Development

4.7.6 Gabon to Construct New Refinery at Port-Gentil

4.7.7 Prospects for Increasing Gabon's Gas Production

4.7.8 Gabon Oil & Gas Market Summary

4.8 Republic of the Congo Oil & Gas Market Forecast 2013-2023

4.8.1 Political and Economic Climate in Republic of the Congo

4.8.2 Doing Business in Republic of the Congo

4.8.3 Oil & Gas Production, Consumption and Reserves

4.8.4 Oil & Gas Sector Organisation

4.8.5 Oil Exploration & Production

4.8.5.1 Lianzi Project to be Completed by 2015

4.8.5.2 Prospects for the Moho Bilondo and Moho Nord Projects

4.8.5.3 Will Eni Utilise Republic of the Congo's Oil Sands Resources?

4.8.5.4 Other Exploration Activity

4.8.6 Gas Exploration & Production

4.8.7 Republic of the Congo Oil & Gas Market Summary

4.9 Ghana Oil & Gas Market Forecast 2013-2023

- 4.9.1 Political and Economic Climate in Ghana
- 4.9.2 Doing Business in Ghana
- 4.9.3 Oil & Gas Production, Consumption and Reserves
- 4.9.4 Oil & Gas Sector Organisation
- 4.9.5 Ghana Oil Exploration & Production
 - 4.9.5.1 Outlook for Jubilee Field Production
 - 4.9.5.2 Recent Exploration & Production Activity
 - 4.9.5.3 Prospects for the TEN Project to Further Boost Production
 - 4.9.5.4 Will an FPSO be Used to Produce from the Sankofa Oil Field
- 4.9.6 Ghana Gas Exploration & Production
- 4.9.7 Ghana Oil & Gas Market Summary
- 4.10 Cameroon Oil & Gas Market Forecast 2013-2023
 - 4.10.1 Political and Economic Climate in Cameroon
 - 4.10.2 Doing Business in Cameroon
 - 4.10.3 Oil & Gas Production, Consumption and Reserves
 - 4.10.4 Oil & Gas Exploration & Production
 - 4.10.4.1 The Dissoni Development and Other Exploration & Production Activity
 - 4.10.4.2 Prospects for the Etinde Oil & Gas Project
 - 4.10.4.3 Cameroon Carries Out New Licensing Round
 - 4.10.4.4 Will the Cameroon LNG Project be Constructed?
 - 4.10.5 Upcoming Pipeline Projects in Cameroon
 - 4.10.6 Will Cameroon Build a New Refinery?
 - 4.10.7 Cameroon Oil & Gas Market Summary
- 4.11 Cote d'Ivoire Oil & Gas Market Forecast 2013-2023
 - 4.11.1 Political and Economic Climate in Cote d'Ivoire
 - 4.11.2 Doing Business in Cote d'Ivoire
 - 4.11.3 Oil & Gas Production, Consumption and Reserves
 - 4.11.4 Oil & Gas Exploration & Production
 - 4.11.4.1 Current Production Locations
 - 4.11.4.2 Future Production Potential
 - 4.11.5 Security Concerns in Cote d'Ivoire
 - 4.11.6 Prospects for Refinery Expansion
 - 4.11.7 Cote d'Ivoire Oil & Gas Market Summary

5. PEST ANALYSIS OF THE WEST AFRICAN OIL & GAS MARKET

6. LEADING COMPANIES IN THE WEST AFRICAN OIL & GAS MARKET

6.1 Chevron

6.1.1 Chevron's Upcoming Production Projects Offshore Angola

6.1.2 Chevron's GTL and LNG Projects in Nigeria

6.1.3 Chevron to Develop the Lianzi Field by 2015

6.2 Eni

6.2.1 Eni's Oil Exploration & Production Activities in Angola

6.2.2 Eni's Activities in the Republic of the Congo and Gabon

6.2.3 Eni to Deploy an FPSO at the Sankof Field, Offshore Ghana

6.2.4 Will Eni Establish West Africa's First Oil Sands Project?

6.2.5 Eni's Involvement in Angolan and Nigerian LNG Projects

6.3 ExxonMobil

6.3.1 ExxonMobil's Exploration & Production Activities in Angola

6.3.2 ExxonMobil Awarded Approval for Erha North Project

6.3.3 Production Continues to Decline from Zafiro Field, Equatorial Guinea

6.4 Royal Dutch Shell

6.4.1 Shell and the Security Situation in Nigeria

6.4.2 Shell's Plans for the Bonga Development

6.4.3 Shell's Involvement in West African LNG Projects

6.4.4 Shell's Activities in Gabon

6.5 Total S.A.

6.5.1 Total to Considerably Expand Production in Angola

6.5.2 Total's Major Upcoming Projects in the Congo

6.5.3 Total's Involvement in the West African LNG Industry

6.5.4 Total to Develop the Egina Field by 2016

6.5.5 Total's Activities in Gabon and Cote d'Ivoire

6.6 Other Leading Companies in the West African Oil & Gas Market

7. CONCLUSIONS

7.1 West African Oil & Gas Market Outlook

7.2 Drivers and Restraints in the West African Oil & Gas Market

7.3 West African National Oil & Gas Markets Forecast

8. GLOSSARY

List Of Tables

LIST OF TABLES

Table 1.1 West African National Oil & Gas Markets Forecast Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 2.1 West African Failed State Index 2012 (Rank, Score)

Table 2.2 West African Governance Indicators 2011 (Percentile Rank)

Table 2.3 West African Countries' Economic Indicators Summary

Table 2.4 West African Countries' Doing Business 2013 Scores

Table 2.5 West African Countries' Corruption Perceptions Index 2012 Rank (Out of 174)

Table 3.1 West African Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 3.2 West African Oil & Gas Market Drivers and Restraints

Table 4.1 West African National Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %)

Table 4.2 West African National Oil & Gas Markets Cumulative Spending 2013-2023 (Rank, \$bn)

Table 4.3 Angola Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.4 Angola's Economic Indicators

Table 4.5 Angola's Competitiveness and Corruption Indices

Table 4.6 Angola's Major Offshore Producing Blocks (Operator, Block, Shallow Water/Deep Water, Other Companies Involved)

Table 4.7 Upcoming Angolan FPSO Projects (Owner, Location, Field Operator, Status, Earliest Operation)

Table 4.8 Upcoming Angolan FPSO Projects (Building Company, Type, Production Capacity, Storage, Estimated Cost)

Table 4.9 Angola's Current Exploration Activity (Company, Block)

Table 4.10 Drivers and Restraints in Angola's Oil & Gas Market

Table 4.11 Oil & Gas infrastructure Projects in Angola (Capacity, Cost Estimate (\$m), Estimated Completion Date)

Table 4.12 Nigeria Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.13 Nigeria's Economic Indicators

Table 4.14 Nigeria's Competitiveness and Corruption Indices

Table 4.15 Drivers and Restraints in Nigeria's Oil & Gas Market

Table 4.16 Oil & Gas infrastructure Projects in Nigeria (Capacity, Cost Estimate (\$m), Estimated Completion Date)

Table 4.17 Equatorial Guinea Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

CAGR %, Cumulative)

Table 4.18 Equatorial Guinea's Economic Indicators

Table 4.19 Equatorial Guinea's Competitiveness and Corruption Indices

Table 4.20 Equatorial Guinea's Major Producing Fields (Operating Company, Current Production [bpd])

Table 4.21 Equatorial Guinea New Offshore Production Sharing Contracts Ratified 2013 (Company, Block and Location)

Table 4.22 Drivers and Restraints in Equatorial Guinea's Oil & Gas Market

Table 4.23 Oil & Gas infrastructure Projects in Equatorial Guinea (Capacity, Cost Estimate (\$m), Estimated Completion Date)

Table 4.24 Gabon Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.25 Gabon's Economic Indicators

Table 4.26 Gabon's Competitiveness and Corruption Indices

Table 4.27 Production Fields that Gabon Oil Company is Involved in

Table 4.28 Exploration Fields that Gabon Oil Company is Involved in

Table 4.29 Drivers and Restraints in Gabon's Oil & Gas Market

Table 4.30 Oil & Gas infrastructure Projects in Gabon (Capacity, Cost Estimate (\$m), Estimated Completion Date)

Table 4.31 Republic of the Congo Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.32 Republic of the Congo's Economic Indicators

Table 4.33 Republic of the Congo's Competitiveness and Corruption Indices

Table 4.34 Drivers and Restraints in Republic of the Congo's Oil & Gas Market

Table 4.35 Ghana Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.36 Ghana's Economic Indicators

Table 4.37 Ghana's Competitiveness and Corruption Indices

Table 4.38 Major Prospective Ghanaian Deepwater & Ultra Deepwater E&P Projects (Name, Depth, Operator)

Table 4.39 Drivers and Restraints in Ghana's Oil & Gas Market

Table 4.40 Cameroon Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.41 Cameroon's Economic Indicators

Table 4.42 Cameroon's Competitiveness and Corruption Indices

Table 4.43 Blocks Available in Cameroon's Licensing Round 2013 (Onshore/Offshore, Approximate Area (Sq Km))

Table 4.44 Drivers and Restraints in Cameroon's Oil & Gas Market

Table 4.45 Oil & Gas infrastructure Projects in Cameroon (Capacity, Cost Estimate

(\$m), Estimated Completion Date)

Table 4.46 Cote d'Ivoire Oil & Gas Market Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

Table 4.47 Cote d'Ivoire's Economic Indicators

Table 4.48 Cote d'Ivoire's Competitiveness and Corruption Indices

Table 4.49 Major Oil & Gas Fields in Cote d'Ivoire (Year of Discovery, Volume in Place (MMOIB and BSCFIP))

Table 4.50 Drivers and Restraints in Cote d'Ivoire's Oil & Gas Market

Table 4.51 Oil & Gas infrastructure Projects in Cote d'Ivoire (Capacity, Cost Estimate (\$m), Estimated Completion Date)

Table 5.1 PEST Analysis of the West African Oil & Gas Market 2013-2023

Table 6.1 Eni's share in Angola's Producing Blocks (Block, Shallow Water/Deep Water, Operator, Eni's Share (%))

Table 6.2 ExxonMobil's share in Angola's Producing Blocks (Block, Shallow Water/Deep Water, Operator, ExxonMobil's Share (%))

Table 6.3 Total's share in Angola's Producing Blocks (Block, Shallow Water/Deep Water, Operator, ExxonMobil's Share (%))

Table 6.4 Other Leading Companies in the West African Oil & Gas Market 2013 (Company, Active Countries)

Table 7.1 Drivers and Restraints in the West African Oil & Gas Market

Table 7.2 West African National Oil & Gas Markets Forecast Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 7.3 West Africa Oil & Gas Infrastructure Projects (Country, Cost Estimate (\$m), Estimated Completion Date)

About

Leading Companies in the West African Oil & Gas Market

The five leading companies in the West African oil & gas market at present are Chevron, Eni, ExxonMobil, Shell and Total. Each is profiled in detail below.

Chevron's Upcoming Production Projects Offshore Angola

Offshore Angola, Chevron operates the shallow water Block-0 with partners Sonangol (41%), Total (10%) and Eni (9.80%), as well as the deepwater Block-14 with partners Sonangol P&P (20%), Eni (20%), Total (20%), Petrogal (9%). In addition, Chevron has a 20% share in the Petrobras-operated Block-2/85.

Chevron's Mafumeira Sul project, located in Block-0, is expected to begin production in 2015 at a cost of \$5.6bn. Chevron announced plans to go ahead with the project, which will be the second development stage of the Mafumeira field, in February 2013. First oil is planned for 2015 with a daily production goal of 110,000 barrels of crude and 10,000 barrels of liquefied natural gas.

An FPSO project is planned for the deepwater Lucapa field in Block-14. In mid-2012 Chevron awarded to KBR the FEED study for a new-build vessel likely to be built in South Korea. However, SBM Offshore submitted a proposal for a converted design, which would be constructed in China. Chevron and its partners should make the FID in H2 2014, after considering both designs. In either case, the FPSO should be able to process between 80,000-100,000 bpd and have a storage capacity of 1m bbls.

Chevron's GTL and LNG Projects in Nigeria

The Escravos Gas to Liquids (EGTL) is due to come online in late 2013 after a number of delays. The plant is a joint project between Chevron, Sasol and the Nigerian National Petroleum Company (NNPC). Chevron has a 65% equity stake held through Chevron Nigeria Limited (CNL), NNPC a 25% stake and Sasol a 10% stake after reducing its share from 37.5% in 2008. The plant, which is about 85% complete, will use Sasol's SPDTM technology and will have an initial capacity of 34,000 bpd. The construction of the project has experienced a number of setbacks as well as severe cost inflation. Originally estimated to cost \$1.7bn, the plant is now estimated to be costing the three partners \$8.4bn, with the commission date moving back twice.

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