

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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Côte d'Ivoire

Equatorial Guinea

Gabon

Ghana

Nigeria

Republic of the Congo

Detailed analysis of regional and national economic development and business climate

Information on current West African exploration activity and upcoming production projects

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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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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