



# **Rio Grande do Sul State: Opportunities for the Oil, Gas, Naval e Offshore Industry**

**FIERGS Oil & Gas Committee (CCPGE)**

02/09/2011

## Brazil

- Population: 193 million (5th)
- Average age: 29
- Language: Portuguese
- Area: 8,514,877 sq km (5th)
- Coastline: 7,491 km
- GDP/PPP: \$2.025 trillion (10th)
- GDP per capita: \$10,200
- GDP growth for 2010: 7%\*
- Unemployment rate: 7.4%

\*estimation.





# Brazilian Oil & Gas Overview

- 20 – 30 year new economic cycle
- Petrobras' investment plan (2011-2015)  
US\$ 224,7 Billion + US\$ 46 Billion (other oil companies ...)
- Pre-Salt and South Atlantic perspectives
- Demand for new technologies
- Regulation for local content
- Supply chain development for Petrobras and other oil companies
- Government grant programs for innovation and technology development
- PROMINP – Federal Government program to develop the local Oil & Gas industry
- Stable institutional Environment



# 4 Big Types of Projects in Brazil until 2020

## FPSO/SS, Supply Boats, Drilling Ships and Refineries



Source: Petrobras



# **Oil, Gas, Naval and Offshore Industry in Rio Grande do Sul State**



**FIERGS**

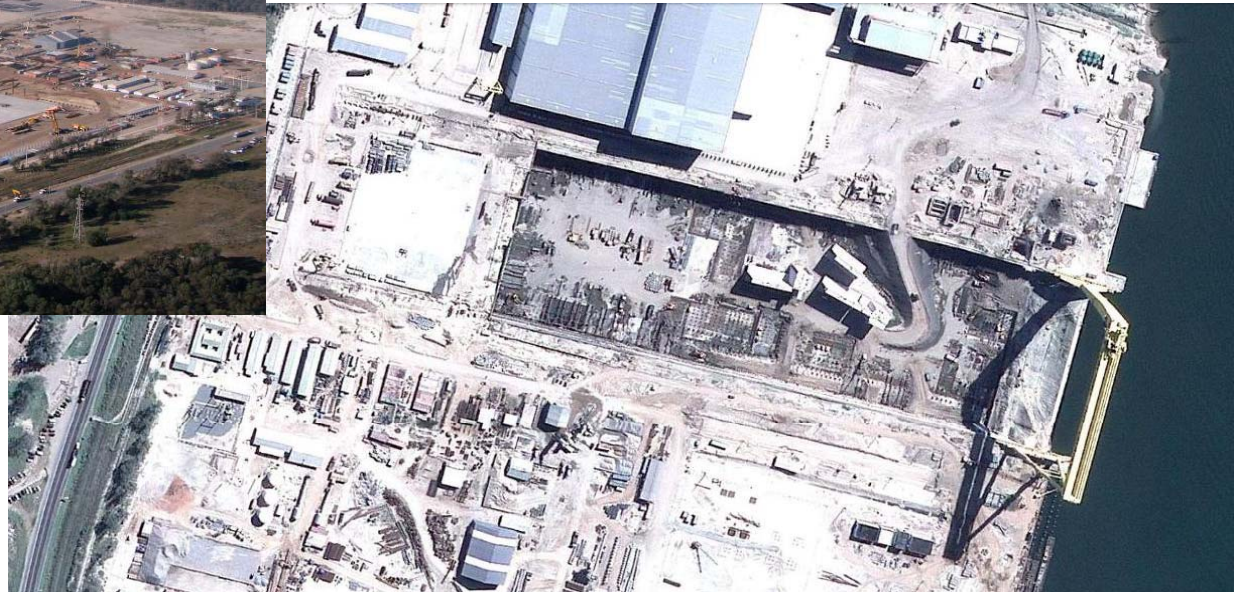
# Naval and Offshore Pole of Rio Grande do Sul

- Main Cities:
  - Rio Grande
  - São José do Norte
  - Pelotas
- Available industrial land
- Potential for new shipyards
- Harbour structure and services





# Rio Grande Shipyard



- Largest dry dock in South America
  - 130 m x 350 m
  - Developed Area: 450,000 m<sup>2</sup>
- Built under contract for Petrobras
- Operations started in 2010

## Rio Grande do Sul Industry Profile

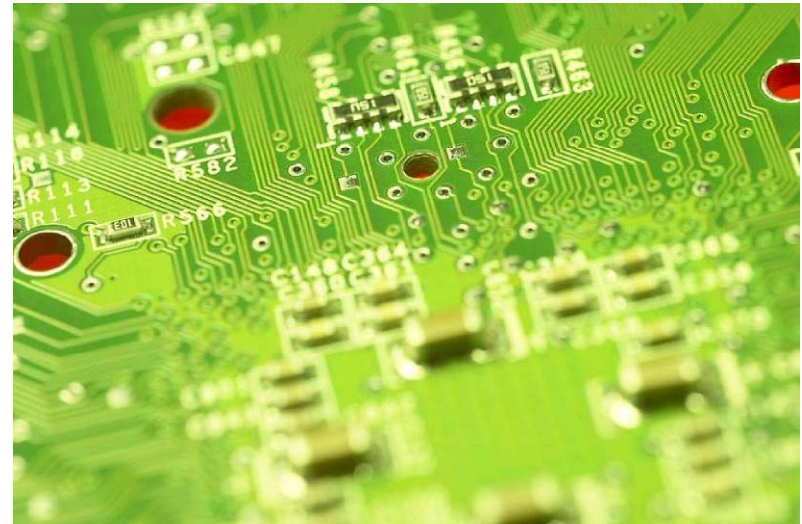
- # 1 in transportation equipment
- # 1 in agricultural equipment
- # 2 in metal industry
- # 2 in industrial machines
- # 2 in industrial electronics
- Others: plastic, rubber, furniture, shoes, food, wine, tobacco





# Rio Grande do Sul Industry Profile

- Long experience in designing and building custom equipment
- Diversified Industries
- Qualified labour
- Quality (ISO...)
- Innovation and Technology





# **FIERGS Oil & Gas Committee**

## **Mission:**

“Develop the Oil, Gas, Naval and Offshore supply chain in Rio Grande do Sul State, facilitating and brokering the needs of Industry, Government and Society.”



# **FIERGS Oil & Gas Committee**

## **Goals:**

- Capture significant part of the current O&G investments in Brazil
- Stimulate international cooperation and joint ventures
- Develop the offshore industry & supply chain in Rio Grande do Sul
- Identify and stimulate industrial investments in Rio Grande do Sul
- Develop programs for education, innovation, research and technology
- Promote networking and knowledge sharing



# **FIERGS Oil & Gas Committee**

## **Services and Support:**

- Government interface (Federal, State and City)
- Support to identify partners and suppliers
- Interface for financing support (BNDES, Caixa Econômica Federal, FINEP, Badesul, Caixa RS)
- Interface to other industrial associations: SEBRAE, ABIMAQ, ABINEE, ONIP, PROINTER, ABDI, CNI
- Interface to PETROBRAS and other oil companies
- Support for obtaining the Petrobras Certificate of Registration and Cadastral Classification – CRCC
- Suporte for supplying for EPCs Companies



## Rio Grande do Sul Main Supply Expertise

- More than **500 companies** already integrated the FIERGS's Pilot Project for Oil & Gas (Over 41 thousands)
- Companies with Petrobras Certificate of Registration and Cadastral Classification – CRCC  
**2009 – 32**                      **2010 – 50**                      **2011 – 98**
- Companies with Petrobras Local Unit Cadastral Classification (REFAP)  
**2010 – 12**                      **2011 – 72**
- Companies registered in the Official National Oil & Gas Opportunities Website (**PROMINP**)  
**2010 – 24**                      **2011 – 250**



## Main Supply Expertise and Potential of Rio Grande do Sul

Industrial Automation

Natural Gas  
compressors

Electric Actuators

Engineering and Projects

Electrical and Electronic

Modules

Valves

Machinery and heavy  
equipment

Engineering and  
Construction

Thermo-mechanical  
equipment

Metal-Mechanical and  
Pneumatic



# FIERGS Oil & Gas Committee

Some members:



Empresas



ThyssenKrupp  
Elevadores





# FIERGS Oil & Gas Committee

Some members:





# Articulation & Defense of Interest

- Deliberative Council ONIP
- Center of Excellence in EPC
- Effective channels to the President, Directors and Managers from Petrobras



*Presidente da Petrobras se reuniu com comitiva do Estado*

Foto: Divulgação



# Articulation & Defense of Interest

- Ministry of Mines and Energy – Brazil
- ANP (Brazilian National Agency of Petroleum, Natural Gas and Biofuels)
- National Coordination of PROMINP
- Regional forums of PROMINP – Rio Grande e Metropolitan Region
- State Government – SDPI – AGDI
- Thematic Technical Board of Oil, Gas and Energy of the State of Rio Grande do Sul
- CNI (National Confederation of Industry)



# Encouraging partnerships with foreign companies Focus: new markets and technology



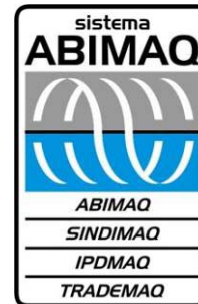
# KOMEA/FIERGS Workshop – South Korea

- July 3, 2011
- 60 Korean companies
- Sponsored by
  - FIERGS
  - AGDI
  - ABENAV
  - PETROBRAS





# Strengthening Performance Network in Brazil





# **Oil & Gas Committe (CCPGE)**

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