

# OIL & GAS TECHNOLOGY

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Tecnología de Petróleo e Gás

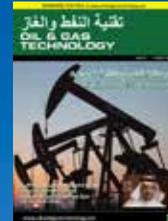
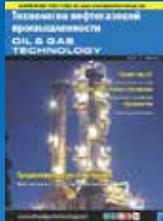
Технологии нефтегазовой промышленности

तेल और गैस प्रौद्योगिकी

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تقنية النفط والغاز

Tecnología de Petróleo y Gas



CAVENDISH GROUP

2014 MEDIA INFORMATION

## OIL & GAS TECHNOLOGY

**Oil & Gas Technology** editions in Brazil, Russia, India, China, Middle East and Latin America showcase the latest technologies and innovations which are continuing to shape the oil and gas industry for a unique growth markets readership.

Since 2004, Oil & Gas Technology brings exclusive and high quality news, interviews, case studies and technical articles which focus on key areas such as exploration and production, refining and processing, downhole and drilling as well as subsea and pipeline technologies.

We connect your business with the most important developments and opportunities in the sector. High profile and well established our publications are bilingual, have a distribution of 10,000 copies per country / regional edition. In addition, Oil & Gas Technology is a media partner to many of the most important regional and global industry events offering a valuable bonus distribution for growth markets.

With a combined edition distribution of 60,000, plus additional bonus distribution at key events, Oil & Gas Technology enables small, medium and large companies from across the globe to reach their target audience and explore untapped opportunities in the oil and gas sector.



## CAVENDISH GROUP

Cavendish Group is the leading business to business publisher and events organiser for the **world's fastest growing economies**. Our industry-specific media products have been **connecting companies to the growth markets since 1998**.

We understand the challenges companies can face in accessing new regions. We are able to give maximum exposure and market representation to any company seeking to influence senior decision makers and engineers in the key growth markets via our **geographically targeted approach**. With constant dialogue with our readers and local partner organisations, Cavendish Group is the ideal agent to bring buyers and sellers together.

Our portfolio of media products also includes websites, online events, white papers and live events, all of which will connect you to the growth markets and promote your company and products.



The outlook for the **Brazilian** oil and gas industry is very promising indeed. Crude oil production in Brazil is forecasted to surpass Mexico and Venezuela by 2015 making it the largest crude oil producer in Latin America, thus representing it a very attractive market for oil and gas companies to take advantage of. Pre-salt is a major area of interest while offshore both deep, ultra deep as well as shallow water continue to boom. There is also a great deal going on in the natural gas sector, interest in LNG installations plus Petrobras' plans to increase refining capacity. The country's market-friendly environment is largely due to Brazil's low level of risk, effective licensing regime and strong oil output growth potential.



**Russia** is a major player in the world energy markets. It has the largest proven natural gas reserves in the world and is among the top ten in proven oil reserves. Its growing economy has also helped Russia to be the third largest energy consumer in the world.

However, Russia's ability to maintain and expand its capacity to produce and export energy faces some challenges. The overriding trend is for western companies to bring their best practice, production and equipment standards into the Russian market to help bring the country's oil and gas fields up to the level in safety, productivity and profitability that we see in the world's mature oil and gas fields.



**India** is now the fourth largest energy consumer in the world, after China, the US and Russia. The New Exploration Licensing Policy (NELP) aims to create an investor-friendly environment and open the doors to much needed capital, as well as to high-end technology and expertise.

32 per cent of India's sedimentary basin remains unexplored with an investment need of USD 6-8 billion in exploration and production. New Delhi in March approved 16 exploration bids to tap the country's vast onshore and offshore reservoirs. An increase in India's refining capacity is also required to meet growing energy needs. Recent gas finds and increased use of gas for petrochemicals, fertilizers and much needed power generation also provides opportunities for investment in the entire petroleum value chain.



**China** is the world's top energy consumer, its consumption currently larger than that of Russia, India, Japan and Germany combined. The need for more energy and more advanced technologies that are not necessarily available from domestic suppliers has also arisen.

Technology and capital investment are critical to the successful exploitation of promising prospects for the country such as the South China Sea, as well as shale gas as an alternative resource. China's shale gas potential stands at 33,000 billion cubic meters (bcm), which is about 10 times higher than its proven natural gas reserves. Although China has capital to invest in the sector, it does not yet have the advanced technologies needed to best harness the nation's shale gas potential.

# OVERVIEW



**Mexico** is a major non-OPEC oil producer, the third top oil producer in the Western hemisphere and one of the main sources of US oil imports. The country boasts massive hydrocarbon reserves, estimated at almost 14 billion barrels of oil equivalent at the start of 2013. These have made state-owned oil and gas firm Petróleos Mexicanos (Pemex) one of the world's largest petroleum companies.

However, Mexico's oil output has declined in recent years, largely due to aging offshore fields and lack of investment in exploration activities to uncover new pockets of crude. Seeking to turn the tide, Pemex allocated a staggering USD 25.3bn into upstream activities over the course of 2013, while national president Enrique Peña Nieto unveiled an historic energy reform proposal to allow foreign companies to invest in Pemex and enter into profit-sharing contracts with the state-owned behemoth to help exploit harder-to-develop deepwater and onshore oil and gas resources.

Foreign expertise is needed now more than ever to revitalise and develop the country's oil and gas sector. Many of Mexico's reserves are located in shallow and deep waters, and so drilling rigs, FPSOs, FLNGs and all the associated equipment, technology and infrastructure required to build, maintain and supply these massive platforms will be required to maximise production in the years to come.



**Colombia** is the fourth largest oil producer in Latin America. Colombian production reached 951,000 barrels per day in March 2012, and that production is expected to reach 1.5 million bpd by the end of the decade.

Much of Colombia's crude oil production comes from the Andes foothills, the eastern Amazonian jungles and Central Colombia. The exploration of new blocks auctioned in 2010 has helped the country increase its output. Oil discoveries tripled in 2010, with proven oil reserves reaching approximately 2 billion barrels in 2012.

The enactment of several regulatory reforms to make the oil and natural gas sector more attractive to foreign investors has served as an incentive for rising production. Significant investments from national and international oil and gas companies have flowed into the country, and additional investments in transport infrastructure and refining capacity will be crucial to expand oil production further. Furthermore, the government has implemented a partial privatization of state oil company Ecopetrol in an attempt to revive its upstream oil industry.

The combination of rising exploration activities and a favourable environment make Colombia a very attractive destination for oil and gas companies, contractors, oilfield service providers and engineering firms. Proven enhanced oil recovery technologies, such as thermal recovery, have been successfully applied in some of the country's largest heavy oil fields and the latest innovations in liquefaction, regasification and storage will allow Colombia to drop anchor in the FLNG arena with the launch of a new FLRSU facility in late 2014 which will help develop its large gas resources.



Since **Argentina's** largest crude oil producer, YPF, was renationalised in 2012, exploration and production has been on an upward trajectory. Unconventional hydrocarbons are identified as an area with tremendous potential and key to reducing dependence on gas imports.

Argentina's 22 tr m3 of recoverable shale gas reserves and its total 77 tr m3 reserves are the third largest in the world and the largest in Latin America. And as the third biggest producer of shale oil after China and the US, Argentina is well positioned to keep up with growing domestic demand. YPF plans to spend USD 15bn over the next 10 years on developing up to 2,000 unconventional oil wells.

To fully exploit this development of unconventional resources, the downstream industry is set to make major investments in refining capacity.

Argentina is also open to foreign enterprises: Exxon Mobil, Royal Dutch Shell and Total are all active in the country and in 2013 Chevron announced a USD 1.2bn investment in Argentina.



**Venezuela** has some of the world's biggest reserves of oil and natural gas. The country is the largest exporter of crude oil in the Western Hemisphere and one of the largest in the world, registering net oil exports of 1.7 million barrels per day (bpd) in 2010. The oil sector is central to the economy of this founding member of the Organization of Petroleum Exporting Countries (OPEC).

Venezuela had 211 billion barrels of proven oil reserves in 2011, the second largest in the world. This number constitutes a major upward revision – two years ago the country's reserves were listed at 99.4 billion barrels. The update results from the inclusion of massive reserves of extra-heavy oil in Venezuela's Orinoco belt. Reserves could reach as much as 316 billion barrels with further investigation from the "Magna Reserva" project.

While crude oil production for 2011 increased 100,000 bpd, equalling 2009 levels, overall production levels have declined by roughly one-quarter since 2001. Natural decline at older fields, maintenance issues, and the need for increasing foreign investment are behind this trend.



As the country with the highest GDP per capita in Latin America, **Chile** is and will continue to be a major consumer of energy. Over the next five years, oil consumption is projected to rise by 15,000 bpd to reach 365,000 bpd. Gas consumption is also set to rise by an estimated 1.5bcm to reach 6.5 bcm by 2018.

Chile is highly dependent on imports, buying in large quantities of gas and more than 150,000 bpd of crude oil. As such, the country has a large refining and processing industry, largely owned by the state-owned Empresa Nacional del Petróleo (ENAP).

In order to break out of this import dependency, Chile is investing in domestic exploration and production to exploit the country's substantial shale reserves.

The EIA estimates that the Magallenes basin in the south of the country may contain up to 2.4bn barrels of recoverable shale oil. Chile also has the third largest shale gas reserves in Latin America, with an estimated 2.3tr m3 extractable reserves.





## SAUDI ARABIA

Saudi Arabia has close to one-fifth of the world's proven oil reserves – at 265 billion barrels –, holds the world's fifth largest natural gas reserves and is the largest producer and exporter of total petroleum liquids.

Most of the country's reserves are contained in eighty major oil and gas fields. Saudi Aramco, the state run Saudi oil company, operates the giant Ghawar field, the world's largest oil field with estimated remaining reserves of 70 billion barrels. The company also operates the world's largest offshore field, the Safaniya oil field located in the Persian Gulf, with 50 billion barrels of total contained reserves.

Saudi Arabia has seven domestic refineries, with a combined crude throughput capacity of about 2.1 million bbl/d. The country continues to integrate its refinery projects with large petrochemicals complexes, in what has been described as the creation of petrochemical cities.

The country is expanding its natural gas, refining, petrochemicals, and electric power industries and has welcomed foreign investment and expertise from such giants as Total, Sinopec, Lukoil, Eni and Repsol-YPF to develop and process its oil and natural gas resources.



## QATAR

Qatar holds the world's third largest natural gas reserves and is the single largest supplier of liquefied natural gas (LNG). It is also a significant net exporter of oil. According to the Qatar Statistics Authority, the oil and gas sector accounted for 58 per cent of Qatar's 2011 gross domestic product (GDP).

Qatar's proven natural gas reserves stood at approximately 890 trillion cubic feet (tcf), with the majority of these located in the massive offshore North field, where most of the natural gas production comes from.

Qatar Petroleum (QP) dominates the country's upstream and downstream natural gas projects, most of which tend towards integrated large-scale projects tied to LNG exports or downstream industries that use natural gas as a feedstock. As a result, QP has favoured international oil companies with the technology and expertise in integrated mega-projects, such as ExxonMobil, Shell, and Total.



## BAHRAIN

Bahrain produced 48,000 barrels per day (bbl/d) of total petroleum liquids in 2012 and is seeking to more than double total petroleum production to 100,000 bbl/d by 2020. The country produced 446 billion cubic feet of dry natural gas in 2011 and has approved a new LNG import terminal to meet part of its future gas demands.

Bahrain imports most of its oil from Saudi Arabia. The country has a 254,000 bbl/d export refinery at Sitra and has plans to expand the refinery's capacity by 100,000 bbl/d to 354,000 bbl/d by 2017.

Saudi Arabia and Bahrain share production of the 300,000 bbl/d Abu Safah offshore field in Saudi Arabia, which is connected to Bahrain's Sitra refinery via pipeline. Bahrain intends to replace the aging pipeline system from Saudi Arabia with the planned New Arabia pipeline, a 71-mile, 350,000 bbl/d pipeline running between the Abqaiq complex in Saudi Arabia and Bahrain's refinery at Sitra.



## UAE

The United Arab Emirates has the seventh-largest proved reserves of both crude oil and natural gas in the world. In the near-term, oil, natural gas, and associated industries will continue to account for the majority of economic activity in the seven Emirates.

The country has placed a strong emphasis on EOR techniques to increase the lifespan and recovery rates of its existing oil fields. This has helped the UAE to nearly double the proved reserves in Abu Dhabi.

Major international oil companies involved in the country's oil and gas sector include BP, Shell, Total, ExxonMobil, and Occidental Petroleum.



## KUWAIT

Kuwait was the world's 10th largest oil producer in 2012 and exports the third largest volume of oil among member countries of the Organization of the Petroleum Exporting Countries (OPEC). Oil accounts for nearly half of its GDP and nearly 70 per cent of export revenues. In an attempt to diversify its energy portfolio, the country has mounted efforts to develop its non-associated natural gas fields.

Kuwait contains an estimated 102 billion barrels of proven oil reserves and in 2012 its total oil production was approximately 2.8 million bbl/d, most coming from the southeast of the country, largely from the Burgan field. Production from the north has increased to approximately 650,000 bbl/d according to the Kuwait Oil Company (KOC), a subsidiary of national oil company Kuwait Petroleum Corporation (KPC).

KPC announced a five-year USD 100bn capital spending programme covering the upstream and the downstream sectors. The plan includes upgrading Kuwait's production and export infrastructure and its tanker fleet, expand exploration, and build downstream facilities. This effort is expected to boost total oil production capacity to 4 million bbl/d by 2020, and it is projected that the production capacity would be maintained through 2030. In order to achieve its 2020 target, investment and participation from international oil companies will be crucial.



## OMAN

Oman is the largest oil and natural gas producer in the Middle East that is not an OPEC member. It is, much like Kuwait and Qatar, highly dependent on its hydrocarbons sector, which in 2012 accounted for 86 per cent of government revenues, according to the national ministry of finance.

A report published by the US Geological Survey in 2012 stated that the estimated mean undiscovered energy resources in the South Oman Salt Basin—located in the southern part of the country—totalled more than 370 million barrels of oil, 315 billion cubic feet (bcf) of natural gas, and over 40 million barrels of natural gas liquids (NGLs). Additional petroleum resources and a growing petrochemicals sector hold the promise of expanding activities in the country.

The continued viability of developing Oman's oil and natural gas resources relies heavily on extraction technologies. Several enhanced oil recovery (EOR) techniques are already in use, including polymer, miscible, and steam-injection techniques. Oman's government offers incentives to IOCS for exploration and development activities in the country's difficult-to-recover hydrocarbon plays.

Established since 2004, Oil & Gas Technology magazine editions are usually bi-lingual and published in both electronic and printed formats. The six editions have a combined distribution of 60,000 to individuals plus additional bonus distribution at key industry events. We distribute to senior decision makers and technical personnel. Recipients include National Oil Companies (NOCs), their service companies and contractors plus International Oil Companies (IOCs) with an interest in projects within the country.

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### RUSSIA

- **GIOGIE, Tsibili, Georgia**, 26-27 March (Winter issue)
- **Oil Tech Atyrau, Kazakhstan**, 1-3 April (Winter issue)
- **OGU 2014, Uzbekistan**, 13-15 May (Spring issue)
- **Neftegaz, Moscow**, 26-29 May (Spring issue)
- **Caspian Oil & Gas 2014**, Azerbaijan, 3-6 June (Spring issue)
- **World Petroleum Congress, Moscow**, 15-19 June (Spring issue, TBC)
- **KIOGE, Almaty, Kazakhstan**, 30 Sep – 2 Oct (Summer issue)
- **SPE Russian Oil & Gas, Moscow**, 14-16 Oct (Summer issue)
- **Mangystau Oil & Gas, Kazakhstan**, 4-6 November (Autumn issue)

### LAT-AM

- **4th Annual Colombia Oil & Gas Summit & Exhibition** 2-4 April 2014, Cartagena (Spring issue)
- **Pecom**, 8-10 April, Tabasco, Mexico (Spring issue)
- **SPE Latin American & Caribbean Petroleum Engineering Conference (LACPEC)**, May, TBC
- **Latin American Petroleum Show 2014 (LAPS) TBC**

### MIDDLE EAST

- **International Petroleum Technology Conference (IPTC)**, 19-22 January, Doha, Qatar (Autumn 2013 issue)
- **Oil & Gas West Asia (OGWA)**, 31 March – 2 April, Muscat, Oman (Winter issue)
- **SPE Kuwait Oil & Gas Summit (KOGS)**, 14-15 April, Mishref, Kuwait (Spring issue - TBC)
- **Tank Storage Forum**, 30Apr-2May, Dubai
- **Petrotech Middle East**, 18-21 May, Bahrain (Spring issue)
- **ADIPEC**, 10-13 November, Abu Dhabi, UAE (Summer/Autumn issues)
- **Offshore Middle East**, 26-28 January 2015, Doha, Qatar (Autumn issue- TBC)

### INDIA

- **Petrotech, New Delhi**, January (Autumn 2013 issue)
- **Oceantex, Mumbai**, February (Winter issue)
- **World PetroCoal Congress & Expo, New Delhi**, February (Winter issue)
- **IDEC, Mumbai**, May (Spring issue)
- **Unconventional Gas Asia Summit, New Delhi**, June(Spring issue)
- **IORS India Oil & Gas Review Symposium, Mumbai**, September (Summer issue)
- **India Chem-2014, Mumbai**, 9th -11th October (Summer issue)

### CHINA

- **CIPPE Beijing, Beijing**, 19-21 March (Winter issue)
- **9th Deepwater China Convention 2014, Shenzhen**, 24-25 April (Spring issue)
- **8th Asia LNG Summit 2014, Beijing**, 27-28 May (Spring issue)
- **11th Asia Gas Congress 2014, Beijing**, 29-30 May (Spring issue)
- **Digital Oilfield Asia, Beijing**, 25-27 June (Spring issue)
- **CIOOE, Shanghai**, 26-28 August (Summer issue)
- **Gas China 2014, Beijing**, September (TBC - Summer issue)
- **The 7th China (Dongying)International Petroleum and Petrochemical Equipment & Technology Exhibition, Dongying**, 17-19 Sep (Summer issue)
- **China (Beijing) International Petroleum Technology Conference and Exhibition (CIPTC 2014)**, Beijing, 9-11 Nov(Autumn issue)
- **SIPPE, Shanghai**, 4-6 December (Autumn issue)

### BRAZIL

- **Santos Offshore, Santos/SP**, 8-11 April (Winter issue)
- **Subsea Forum Rio, Rio de Janeiro**, 26-28 May (Spring issue)
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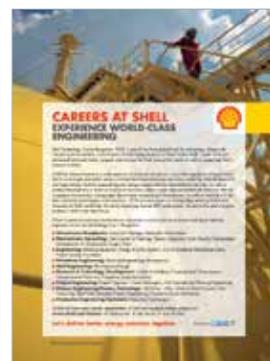
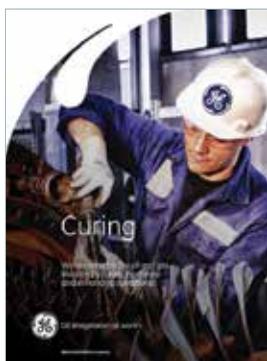
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