



# Mozambique

## Offshore Energy Report

Executive Summary

2021

# Mozambique Offshore Energy Report 2021

Archer Knight's offshore energy reports help our clients to be better informed and make more objective decisions. We give you the information you need to understand industry dynamics in offshore oil & gas, as well as other energy sources.

**Contact us** at [info@archerknight.com](mailto:info@archerknight.com) to receive your full report, which covers the following areas:

- **Offshore Energy Review**

An overview of the region's offshore energy industry, outlining the main recent developments.

- **Historical Background**

A brief insight into the origin of offshore hydrocarbon exploration in the area and how it has evolved over time, highlighting the most attractive growth areas and those which are in decline.

- **Recent Market Developments**

A short 'state of the nation' on current activity levels within the region. We look at the challenges and opportunities the industry will face in 2021 and beyond.

- **Future Activity & Prospects**

A detailed look at current and future projects and the subsequent support-service requirements.

- **Regulators & Industry Bodies**

Establishing the region's regulators, as well as other key influencers such as local industry bodies and influential interested parties.

- **Licensing**

Our report breaks down the licensing process for offshore development, including current and future licensing information.

- **Logistics & Existing Infrastructure**

Having the correct logistics and infrastructure support is essential. At Archer Knight, we focus on the facilities available within a country's existing supply chain.

- **Operators**

We provide a detailed breakdown of each operator currently working within the region, either as a duty holder or a non-operating partner.

- **Contractors**

Review of the main contractors either established in country or currently setting up operations.

- **Service Companies**

Assessment of the main companies supporting the operators and contractors and the range of services they provide.

## Mozambique - all eyes on the potential next energy superpower

Mozambique is embarking on a new era of energy investment that could change its fortunes. Since initial exploratory drilling revealed economy-changing volumes of natural gas in 2007, the potential for vast natural reserves means Mozambique could be the third-largest holder of proven natural gas in Africa (behind only Nigeria and Algeria) and the world's fourth-largest natural gas exporter.

Although Mozambique has no proven oil reserves, the Rovuma Basin, a coastal basin situated near the border of Mozambique and Tanzania, has reported natural gas reserves in the region of 125 trillion cubic feet.

Anadarko and Eni are the two companies that discovered Mozambique's potential. However, they are not the only companies attempting exploration activities. ExxonMobil, Qatar Petroleum and China National Petroleum Corp (CNPC) are all competing for control over Mozambican LNG.

The investment in Liquefied Natural Gas (LNG) plants in Mozambique is colossal, with the Coral South Floating plant, operated by Eni, becoming the first Rovuma basin plant to reach a final investment decision. First gas is scheduled for 2022. In 2016, the Coral South project reached an agreement for the 20-year sale of 100% of LNG supply to BP, which is expected to be sold internationally.

Total has also secured almost US\$15 billion in debt financing for its Mozambique LNG facility. With a total post financial investment decision of US\$20 billion and US\$14.9 billion in project financing, Mozambique LNG represents the largest foreign direct investment in Africa to date.

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## Detailed and targeted market intelligence

We are subsea industry experts and consultants, providing market intelligence and specialist support. Our goal is to provide detailed analysis combined with the insight needed to help your business grow.

We help our clients quickly assess the strategic value of the market. This allows them to evaluate the opportunities and risks against their investment.

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## Targeting the key players

We believe in order to succeed, companies need OPEX-led insight (analysis from the ground floor) to give them a roadmap from market intelligence to market share.

Understanding the dynamics in the market and assessing these against the supply and demand generated each region's industry is key. Our aim is to provide a deep dive into the existing players within the market and establish the areas of opportunity.

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## Helping you find the best opportunities

We reflect the current market against our clients' services and provide a clear business implementation plan.

We help our clients to walk the 'last mile', supporting them on market entry, pursuit planning and ultimately securing the most profitable business opportunities available.



## Turning Market Intelligence into Market Share

The subsea industry is awash with news and activity but it's harder than ever for businesses to cut through the noise.

We believe technology has a powerful role to play in how we deliver subsea market intelligence and communications. That's where Flowline comes in.

Our new software-as-a-service (SaaS) platform acts as your very own digital market intelligence 'employee', bringing together in one place upstream oil & gas industry communications and market intelligence, creating a clear pathway to increased opportunities.

### Flowline

Flowline is an interactive web-based platform, applying our bottom-up granular analysis to give a detailed real-time view of the subsea market.

The subsea industry is complex. To target the most profitable opportunities our clients need to know how the different moving parts relate to each other. Flowline makes the link between the operators, suppliers and service providers with the contract awards, project updates and the existing supply chain function. This helps clients make their own judgements on market trends.

From a central global intelligence dashboard, Flowline allows users to track points of interest to them, such as vessel & asset activity, or companies they want to work with. This is set alongside macro data, such as fluctuations in the oil price – all in real time.

At Archer Knight we already have a track record of producing high-quality industry reports which allow our clients to bridge the gap from market intelligence to market share.

There are three key reasons why we see Flowline as the next step in this journey:

- 1 High-quality, real-time data
- 2 User friendly
- 3 Accessible to all

# Granular Market Intelligence Reports for the Subsea Industry.



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