



Department for
Business & Trade

Offshore Decommissioning in Brazil – Market Scenario & UK Government Support

8th July 2025



Why Brazil?



3rd largest market for decommissioning projects in the world.

First wave of projects with 125 units to be decommissioned by 2036, mainly from Campos Basin*.

Second wave of projects expected to go beyond 2050 considering 191 units installed between 2010 and 2020 in the Santos Basin, Pre-salt*.

~US\$12 billion – expected to be spent in decommissioning in Brazil until 2029 (ANP), majority by Petrobras.

Market Scenario



THE VOICE
OF THE ENERGY
SUPPLY CHAIN

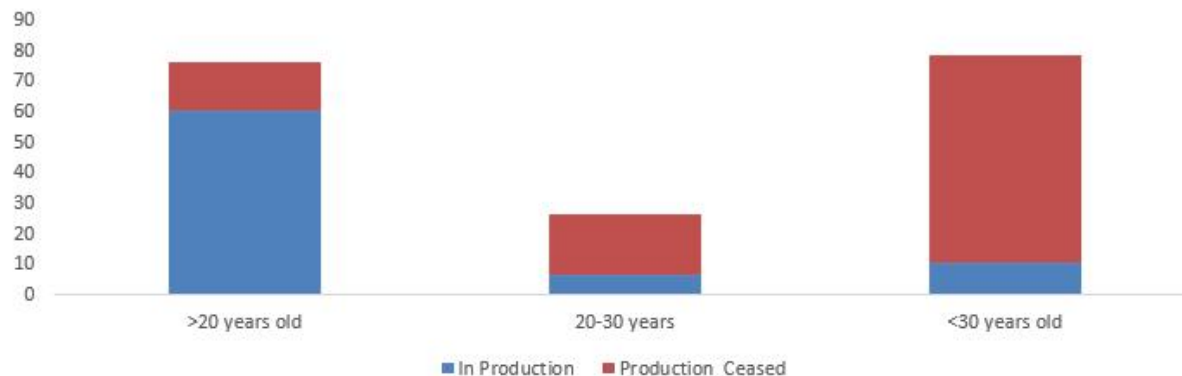


Decommissioning in Brazil – Assets Age

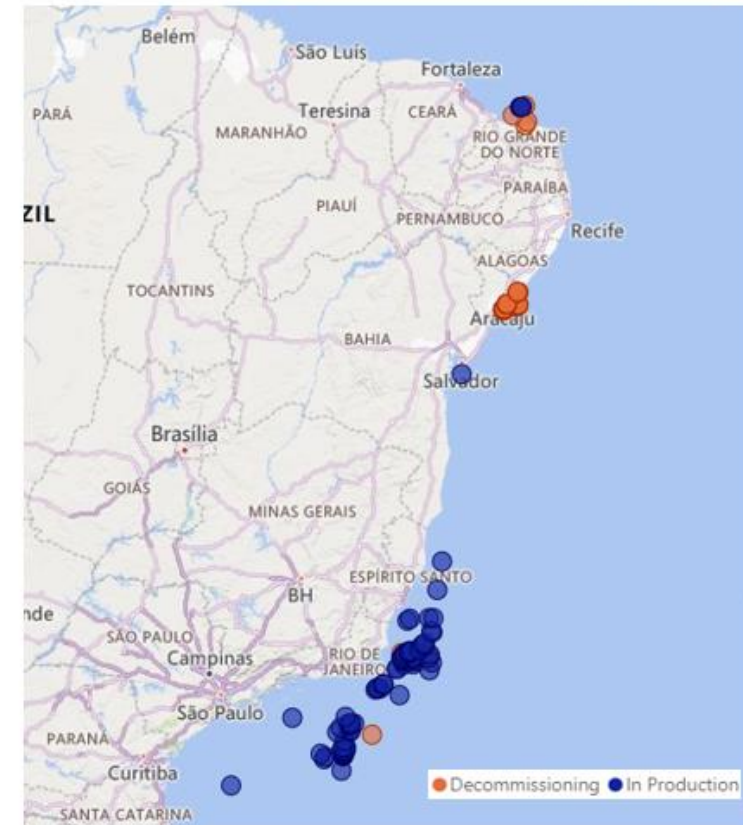
Of the current 76 platforms/FPSOs in production in Brazil, most in the Campos and Santos Basin, 60 (79%) of them have less than 20 years.

The country also had already 105 platforms with ceased operations or are in the process to be decommissioned.

Offshore Oil & Gas Assets Age in Brazil (July 2025)



Offshore Oil & Gas Assets in Brazil,
Decommissioning and In Production (July 2025)



Market Scenario



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Key EPRD Contracts

Contractor	Date of Award	Description	Status
Modern American Recycling Services (M.A.R.S.)	May 2023	Engineering, preparation, dismantling, and green recycling of FPSO Capixaba (contract awarded by SBM Offshore)	Ongoing
Joint-Venture - <u>Ecovix</u> -Gerdau	Jul 2023	Decommissioning of the P-32 FPSO.	Ongoing
Subsea7	Nov 2023	Decommissioning of anchoring equipment, flowlines, umbilicals and production lines at Bijupirá-Salema.	Ongoing
OceanPact Serviços Marítimos	Jul 2024	730-day contract for the removal of subsea system and anchoring structure.	Ongoing
Etesco Construção e Comércio	Jul 2024	Jack-up rig provided for the plug and abandonment campaign of the field's wells.	Ongoing
Mota-Engil Group	Jun 2025	Services related to Marlim, Marlim Sul and Marlim Leste subsea assets' dismantlement.	Ongoing

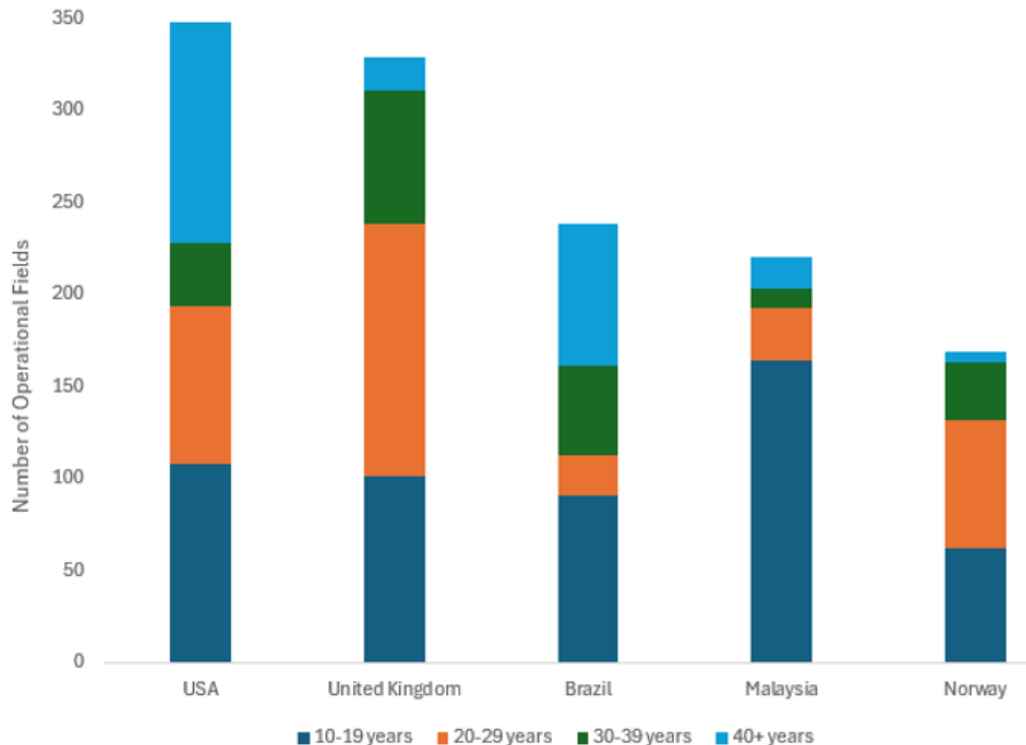
Market Scenario



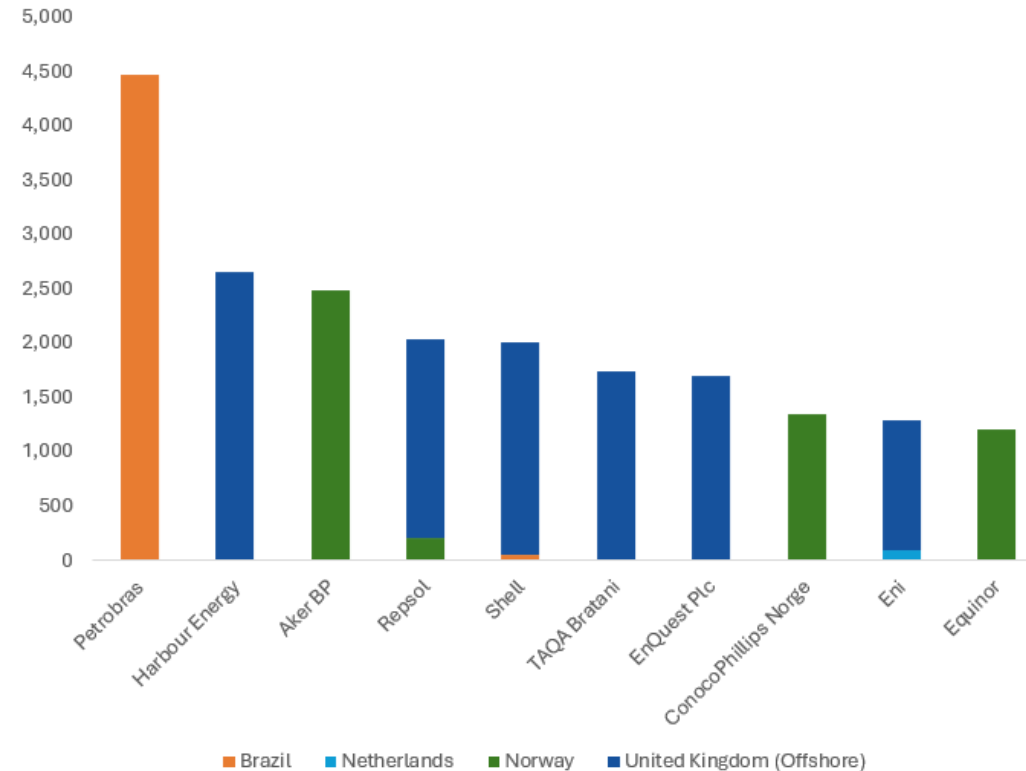
**THE VOICE
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Markets of Interest for Upstream Decommissioning



Decommissioning Players per DECOMDEX (US\$ Million)



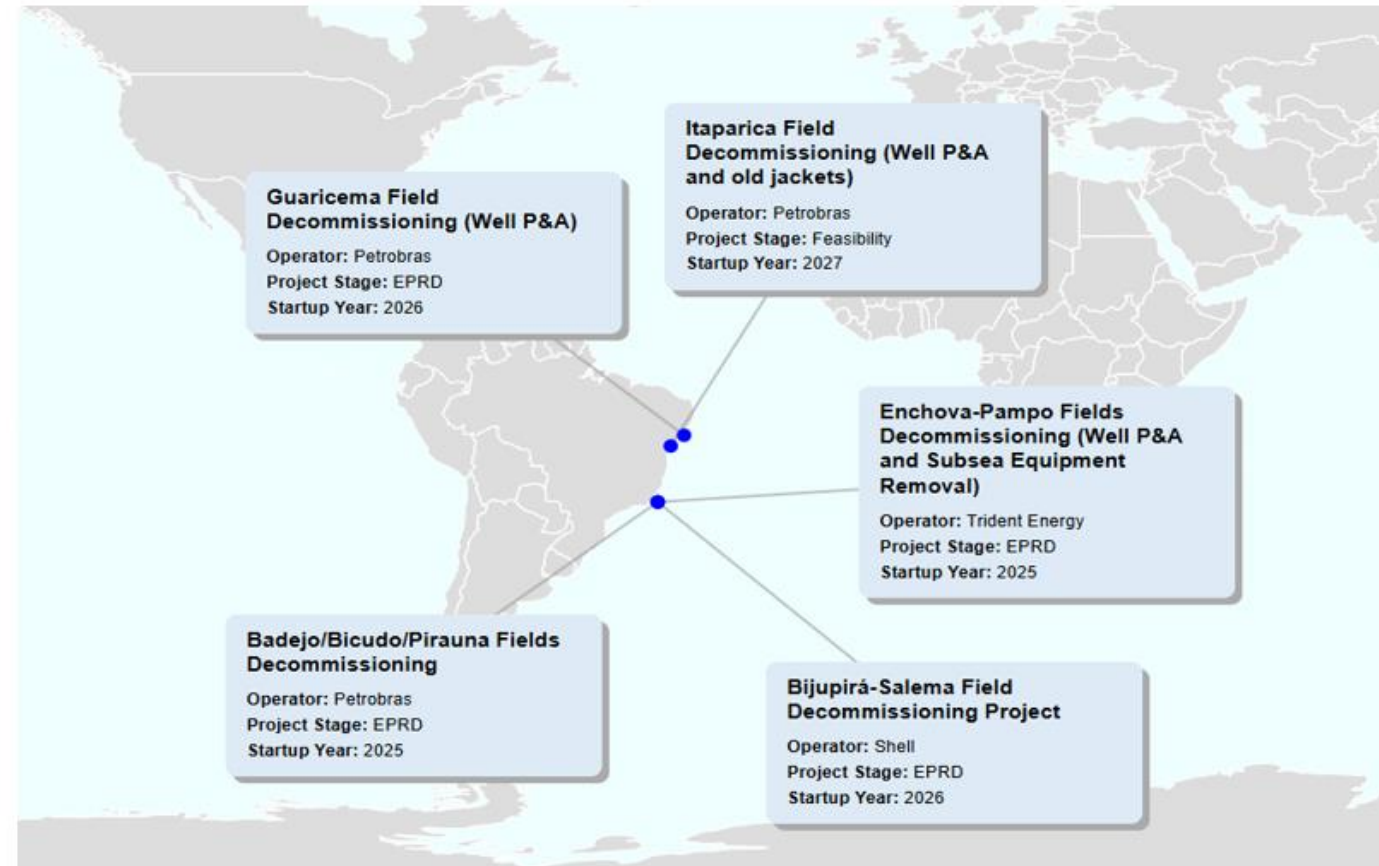
Market Scenario



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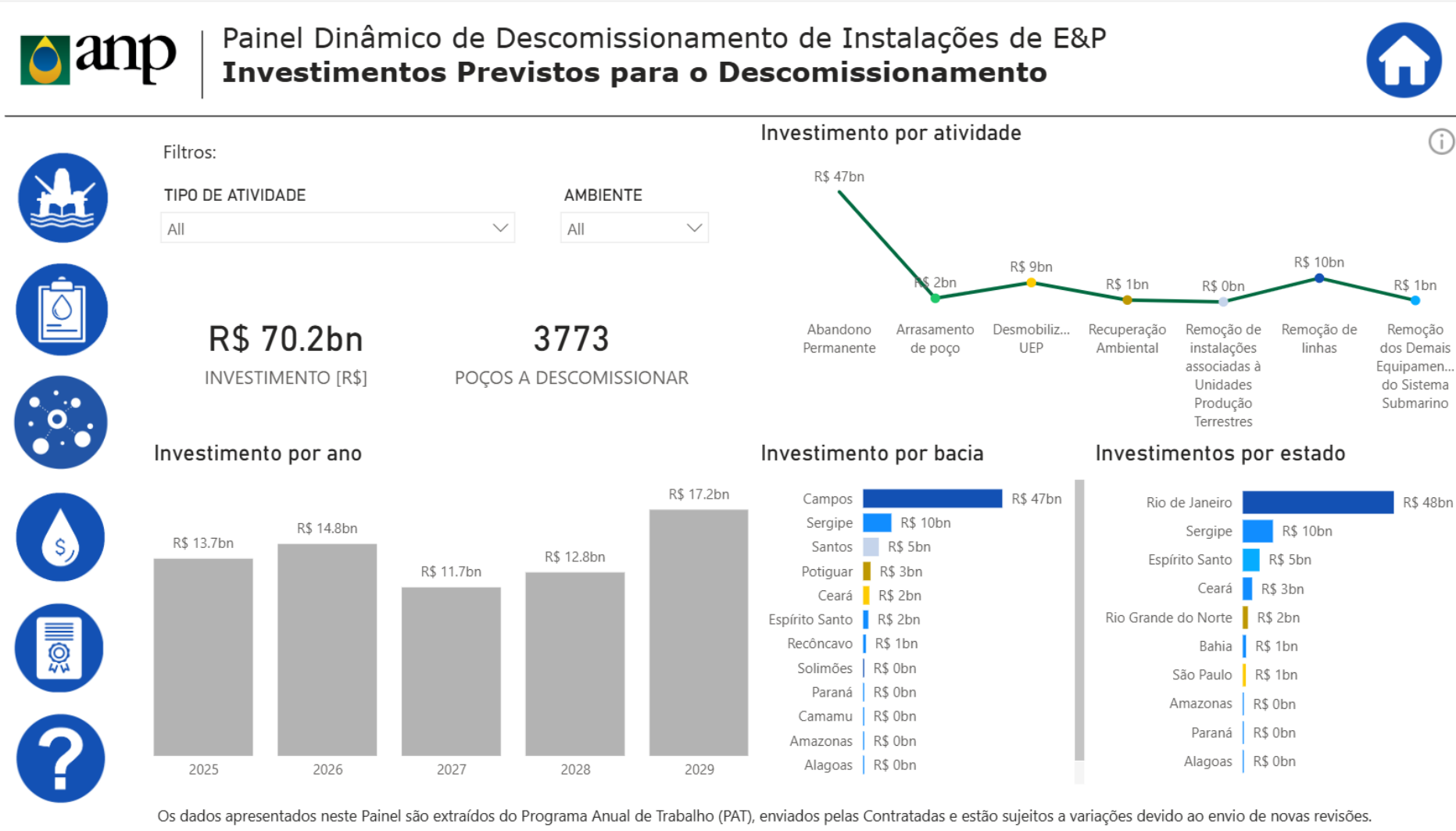


Decommissioning Project Highlights



Market Scenario

ANP's Decommissioning Dynamic Panel - data visibility dashboard



Challenges & Opportunities

- Workforce training
- E&P demanding the same resources – vessels, tools
- Subsea cutting and recovery
- Alternative methods for disconnection of mooring lines
- Integrity of the subsea structures
- Cleaning and destination of NORM and other contaminants
- Well services – integrated P&A, monitoring, tube pulling, wellhead severance, chemical stimulation
- Inventory of Hazardous Materials - IHM
- Engineering for CoP planning and execution
- Specialised yards for decommissioning and dismantling
- Customised solutions and business models



Petrobras' Tender – Subsea Reel Drive System

- **Opportunity # 7004433542 - international**
- Object: ETEC (Technological Order) for the development of **up to 3 subsea systems for the recovery of subsea flexible pipes**, utilising a reel drive system.
- Status: Open, receiving expressions of interest and questions
- **Deadline: 10th September 2025**, 1200h, BRT (GMT-3).
- **How to participate:**
 - Search for the opportunity # 7004433542 at the Petrobras Procurement Portal Petronect (www.petronect.com.br)
 - Read the tender documents. RFQs and templates.
 - Click on “I’m interested” and follow the steps.
 - **Letter with expression of interest** to be submitted to Petrobras by no later than 10th September 2025 noon, BRT (GMT-3). Enquiries should be made via the ‘Collaboration Room’ in the opportunity.
 - **DO NOT** send a proposal at this stage.

How can DBT help?

What we can do to assist UK & BR companies

- Provide **off-the-shelf** market information;
- Identify **potential local partners**, agents, distributors or industry specialists;
- **Facilitate connections** and **strategic partnerships**;
- Provide **financial support, guarantees and investment insurance** (UKEF);
- **Market Visit** Opportunities;
- Identify **trade barriers** and work to reduce or eliminate them;

Market Visit Opportunity

O&G Decommissioning Mission to Brazil

TBC 24 - 27 November 2025, Rio de Janeiro

- 4-day Programme of activities, Friday free for own engagements;
- Briefing session with selected partners on Doing Business in Brazil;
- Meetings with key stakeholders and potential buyers;
- High level networking activity with other industry contacts;
- Opportunity to gain visibility in the market;
- Opportunity to identify potential local partners and engage with potential customers;
- Learning & Business Development journey.

➤ **Register your interest** by sending an email to flavia.silva@fcdo.gov.uk



Thank you!

Flavia Silva de Castro

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