



# Crude Oil Supply Analytics

Drill Down into the Global Crude Oil Supply Outlook



## Example Workflow Questions

Do forecast activity levels in a country point toward more competition for access to upstream assets and oil services? How much undiscovered potential is there?

What is outlook for different types of crude oil quality? Where is heavy oil production increasing—or declining?

What is the breakdown between onshore and offshore projects in major producing countries—and globally? How many deepwater projects are expected to be developed in the next decade?

What is the U.S. unconventional new source production by major sub plays by breakeven tranches?

What are the assumptions about policy and market conditions that shape the IHS Markit outlook for production in key Middle Eastern countries? How critical are these assumptions to the global oil demand and supply balance?

## Detail Behind the Production Outlook

Crude Oil Supply Analytics (COSA) unlocks the detail behind IHS Markit's global crude oil and condensate production outlook.

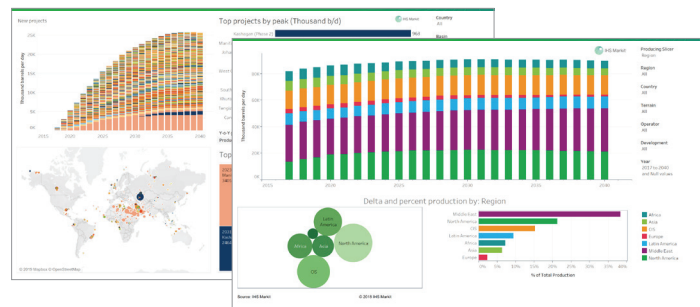
COSA supports business development, market and trading analysis, portfolio management, and refinery feedstock planning. The service provides an ability to dig into the components of oil production and understand underlying cost, quality, technical, political and economic assumptions for 21 key countries.

## COSA Deliverables

### Country Profiles

Provide key assumptions and detail on forecast drivers for 21 critical producing countries, with information on:

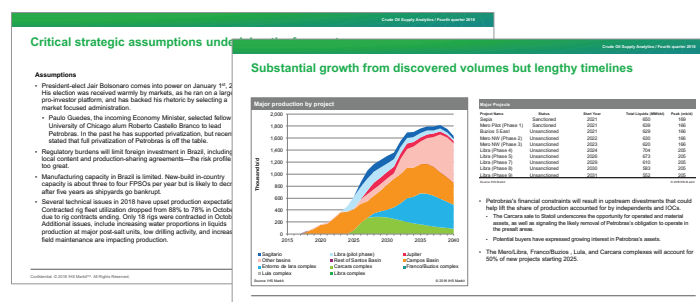
- Above and below-ground risk factors
- Historical and current crude oil and condensate production by terrain
- Anticipated base decline rate of current production
- Projects under development (sanctioned and unsanctioned) including onstream date, volume, and geography
- Estimate of “yet-to-find”—the amount of undiscovered oil that will be found and developed in the time frame of our outlook
- Full cycle cost estimate for each component of future supply
- Breakdown of crude oil quality by API gravity (light, medium, and heavy)



## Analytical Tool and Data Files

Provide access to forecast detail and enable the user to slice-and-dice global current and future production by:

- Cost structure of global production by breakeven price
- Production by terrain (onshore or offshore by water depth)
- Crude oil production quality by API gravity
- Existing and new source production
  - For conventional production: existing, sanctioned, unsanctioned and yet-to-find volumes in our outlook
  - Unconventional (tight oil) production: existing and projected production
- Major project production by operator (conventional production)
- Production by geography (sub-play, basin, and country)





# Addressing Key Workflow Needs

## Upstream Production Analysis

- Understand E&P operator landscape in countries of interest, and compare E&P operators by mix of crude quality, terrain, development stage, etc. for conventional production
- Compare countries based on size of undiscovered potential
- Identify countries where increased production is likely to lead to more intense competition for access to upstream assets and oilfield services

## Oil Markets Analysis

- Examine IHS Markit assumptions for basins, projects, operators, and geopolitical influences in key producing countries
- Understand main uncertainties, and identify short, medium, and long-term drivers of global supply
- Create customized global crude supply curves, considering geography, quality, terrain, price assumptions, etc.

## Business Development Planning

- Identify E&P operators present in key countries
- Consider how new projects may shift service needs in a given country over time
- Understand new source production by breakeven levels, terrain types

## Refinery Source Planning

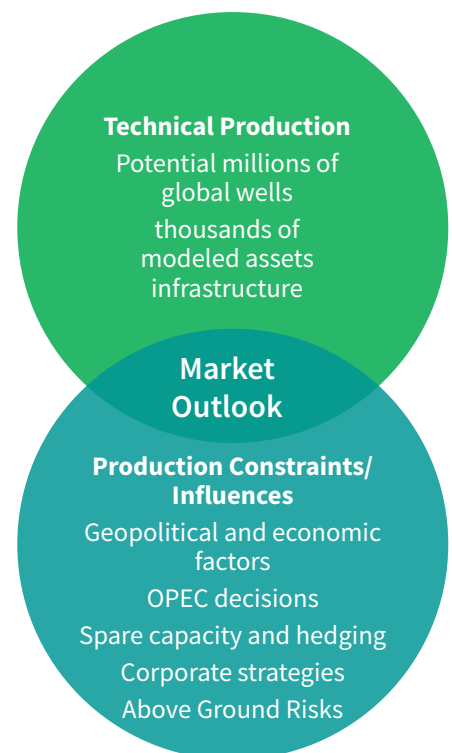
- Quantify forecast production declines/increases in current source countries
- Identify potential new crude supply streams
- Explore trends in crude quality over time – how crude slates are likely to change by API gravity or crude stream
- Recognize geopolitical triggers affecting supply in key countries – know which signposts to look for

## Market Outlook for Crude Production

Our forecasts of crude production to 2050 start with technical production potential, derived from IHS Markit modeling of thousands of assets globally, and then layer on the anticipated effects of non-technical factors. The result is a market view of global supply volumes that reflects the complex and interconnected factors that are likely to keep potential crude out of production.

## Fully Aligned with Crude Oil Markets Suite

Crude Oil Supply Analytics is available as a supply-focused stand-alone offering. However, it may also be used in concert with elements of the Crude Oil Markets Suite - providing significant additional supply detail, with quarterly updates.



## About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 80 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.

### CUSTOMER CARE

#### NORTH AND SOUTH AMERICA

**T** +1 800 447 2273

+1 303 858 6187 (Outside US/Canada)

#### EUROPE, MIDDLE EAST AND AFRICA

**T** +44 1344 328 300

#### ASIA PACIFIC

**T** +604 291 3600

**E** [CustomerCare@ihsmarkit.com](mailto:CustomerCare@ihsmarkit.com)