Arthur D Little

Challenges to Vaca Muerta development

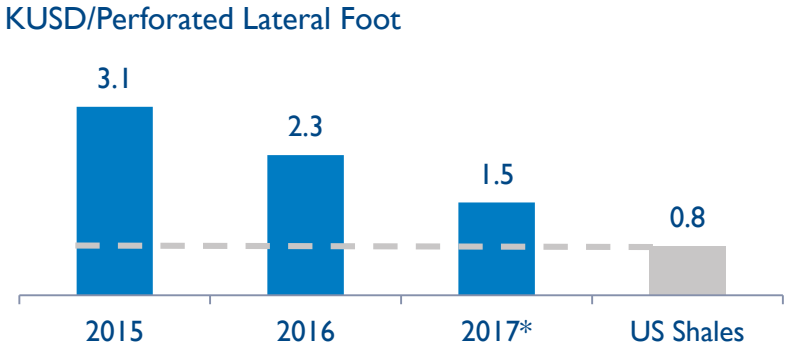
Unconventional Oil & Gas in Argentina

March 27, 2018

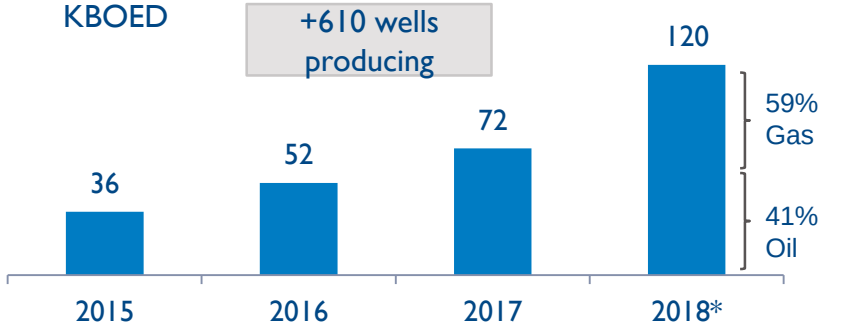
THE DIALOGUE
Leadership for the Americas

Vaca Muerta development has built momentum and it is expected to continue growing

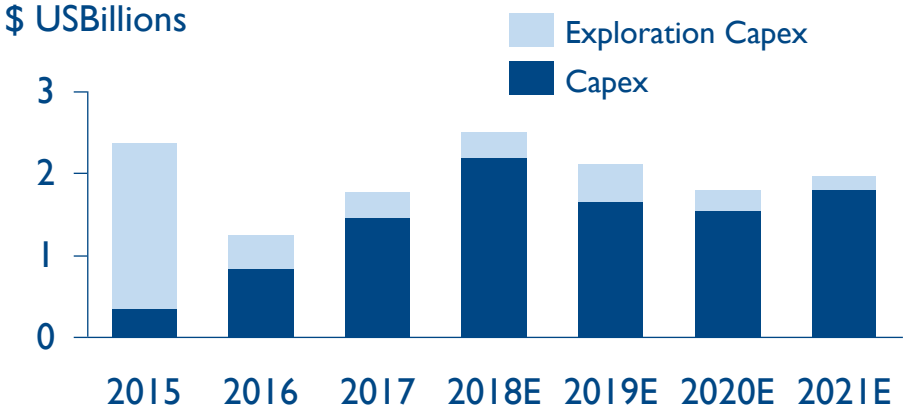
Drilling Cost



Unconventional Production



Investments



Players

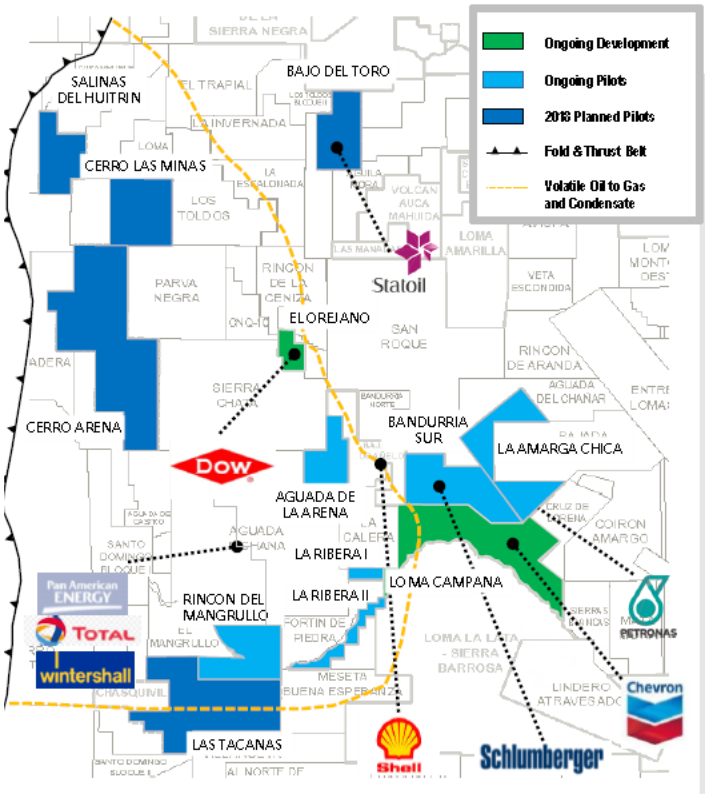
Two blocks in development and more than 15 pilots under evaluation..

Chevron, YPF, pluspetrol, Dow, Petronas, American Energy Partners, Pan American Energy, NQN Gas y Petróleo del Neuquén, Shell, ExxonMobil, Pampa Energía, Total

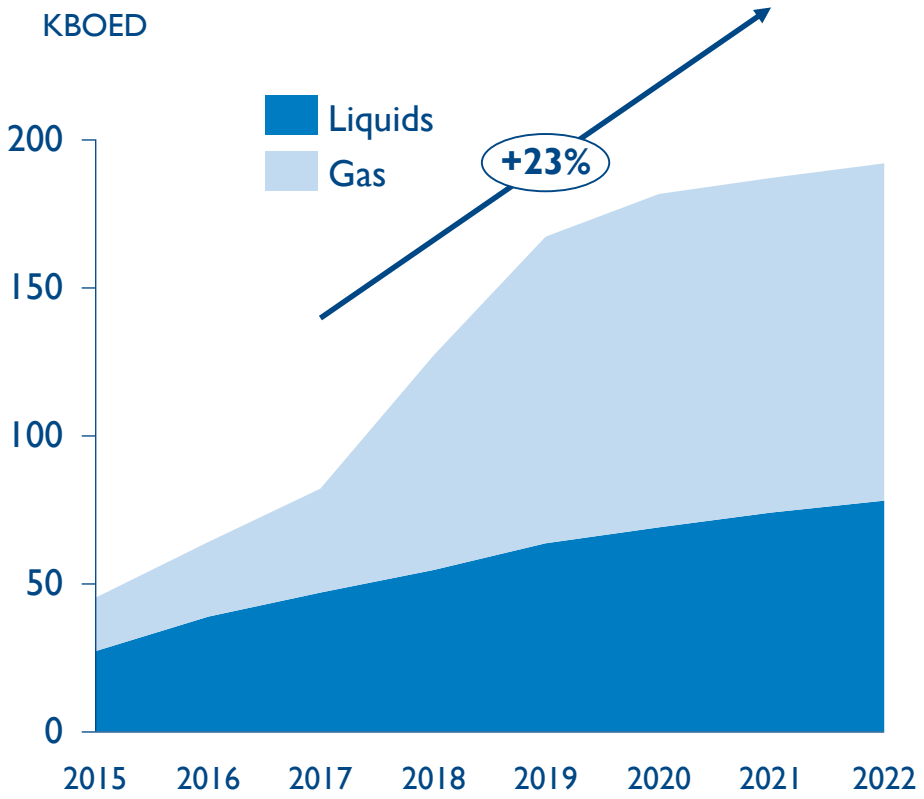
Source: YPF, Rystad Energy, Arthur D. Little Analysis (*)

With the announced investments in several blocks the production could reach levels of 250 Kbpd by 2025

Vaca Muerta Operations YPF 2017

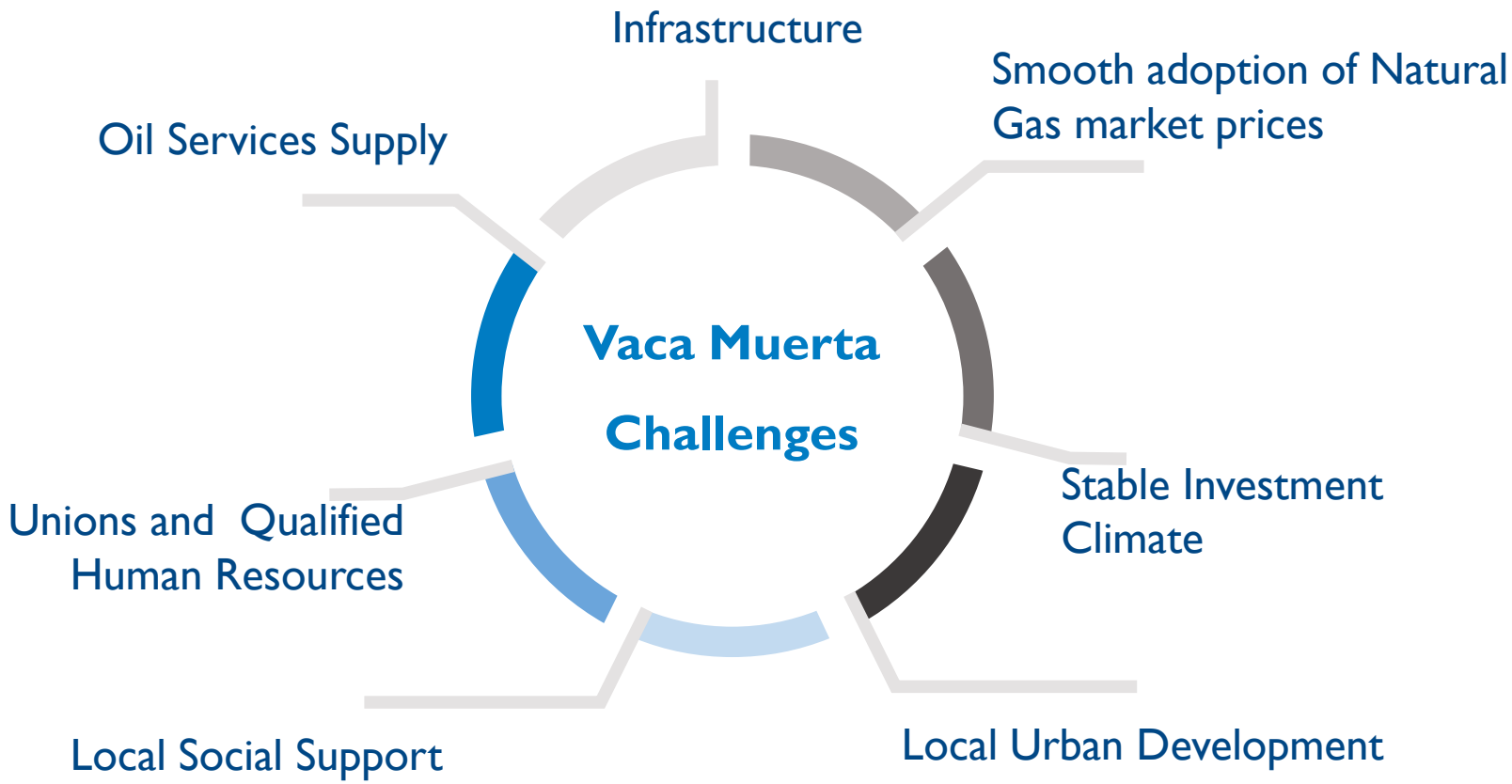


Unconventional Production Forecast



Source: YPF, Rystad Energy. Arthur D. Little Analysis

However, Vaca Muerta development still needs to overcome several challenges



Source: Arthur D. Little Analysis

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