Industry Trends Renewable Energy and the Oil and Gas Market

Robert Half
Talent Solutions

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About this material

The Industry Trend study, aimed at the Renewable Energy and Oil & Gas subsectors, aims to provide companies with an overview of the prospects and challenges in the near future, from a people management perspective. The material provides an analysis and alert on how professionals can impact companies' results.

The framework described in this material is based on both data from public sources and research by Robert Half.

Robert Half understands that its role in the market goes beyond hiring or assigning professionals to its clients' projects. Part of its uniqueness lies in promoting quality content to support the decision-making of managers and leaders across a wide range of sectors.

The purpose of this study, therefore, is also to present managers with a broad picture of these sectors, in order to connect market realities to companies' issues within the scope of talent management.

The energies that move Brazil

Energy consumption in Brazil – both for electricity generation and fuel for transportation and logistics – has been steadily expanding in recent years, despite slowing population growth, fleet renewal with more fuel-efficient vehicles, and investments in energy efficiency.

Brazil consumed 3.9% more electricity in 2024 than in 2023 and surpassed, for the first time, the 70 thousand average megawatt (MW) mark, according to data from CCEE (Electric Energy Commercialization).

As a result, the market has evolved rapidly to meet this demand – whether with the arrival of new players or with investments to expand those currently established.

Two expanding sectors: Big numbers

202,233 MegaWatts (MW) is the power of the National Interconnected System (SIN) of electrical energy

4,284 MW was the growth between January and May 2024

47.8 thousand GWh was the consumption of electrical energy last March (record since the beginning of the historical series, in 2004)

132 new generation projects of energy came into operation between January and March 2024

62 wind power stations

57 solar power stations

8 thermoelectric plants

5 hydroelectric plants

Free energy market participants reached **43,540** at the end of the first quarter of 2024

In 2023, Brazil consumed **129.6 billion** liters of liquid fuel

4.8% growth compared to to the previous year

The growth of oil and gas

Although renewable energy and the prospect of energy transition are attracting public attention, the oil and gas sector continues to expand steadily, driven by growing demand.
The oil and gas sector currently accounts for over 10% of industrial GDP and is expected to invest US$183 billion between 2022 and 2031.

According to the Ministry of Development's Foreign Trade Secretariat, oil was Brazil's highest-valued export in 2024. Crude oils alone totaled US$44.8 million. This represents a 5.2% increase over the previous year's R$42.6 million.

Global investment in oil exploration capital has returned to growth after a long period of reduced investment that began in 2016. Global economic dependence on fossil fuels has shown its resilience in the current situation.

Oil and gas exploration and production in Brazil

Brazil finds itself in an opportune position on the global stage. One reason is the rejection of Russian oil and gas by several countries, which demands alternative trade partnerships in Europe and other Western economies.

Another is that, in a time of energy transition, Brazilian oil has a CO2 and sulfur emission rate lower than the world average, which makes it better positioned than most of its competitors.

Added to these two factors is the prospect of significant growth in national production, as a result of new exploration frontiers, on the one hand, and on the other, the privatization of mature fields, which end up remaining productive for longer than previously anticipated.

Energy matrix transition

The energy transition is one of the themes driving global economic developments. The climate crisis and its impacts have reinforced the need to shift from an energy matrix dependent on oil and gas to one based on renewable resources, impacting the entire global economy—from the automotive industry to the food industry.

According to Aneel, the four largest renewable sources that make up the Brazilian electricity matrix are hydro (53.88%), wind (15.22%), biomass (8.31%) and solar (7.2%). Among the non-renewable sources, the largest are natural gas (8.78%), oil (3.92%) and coal (1.7%).

When it comes to the origin of electrical energy, the predominance of renewables is even more striking, with 61.9% coming from hydroelectric plants and another 26.2% from other renewable sources installed in the country – compared to only 10% from non-renewable sources.

This transition has accelerated both in Brazil and around the world, and this has generated diverse impacts on the job market.

Renewable energy and the M&A wave

According to a survey by Zaxo M&A Partners, which analyzed more than 20,000 global transactions, even in a context of economic volatility, renewable energy will lead the mergers and acquisitions movement in Brazil in 2025.

The study reveals that these transactions represent 40% of the country's M&A market this year, worth approximately R$120 billion. Nationally, the number of mergers and acquisitions in the solar sector grew 76% in 2024 (Greener), totaling 51 transactions involving plants with at least 3.6 GWp of capacity. In centralized generation, the number of deals quadrupled, while distributed generation doubled its operations, with 14 transactions.

Provisional Measure 1,212, which extended the deadline for renewable projects to begin operations with the right to tariff subsidies, was one of the factors that drove this movement, especially in “greenfield” solar projects, still in their initial phase.

Renewable Energy Employability

With the wave of M&A and movements in the renewable energy market, the sector's employment opportunities are expected to continue expanding rapidly—and potentially attracting professionals currently working in other sectors and industries. Behind only China and the European Union, Brazil currently employs approximately 1.56 million people exclusively in renewable energy production.

According to data from the Renewable Energy and Jobs – Annual Review 2024 report, by the International Renewable Energy Agency (Irena) and the International Labour Organization (ILO), 994,260 jobs were created specifically for the biofuels sector in Brazil, confirming the relevance of this market in the country.

The deregulated energy market and new demands

Between January and December 2024, the Electric Energy Trading Chamber – CCEE concluded 26,834 new migrations to the deregulated energy market, a record volume that exceeds the results of 2023 by more than three times.

Since January 2024, all consumers connected to high and medium voltage, known as Group A, can opt to migrate to the deregulated market. Companies with demand above 0.5 MW can choose to participate directly in the CCEE, requiring membership, or through representation by a retail agent.

This expansion has changed the energy management landscape in Brazilian companies. On the buyer side, many industries have already incorporated the role of energy (or energy efficiency) manager, who oversees the company's overall matrix and seeks to optimize costs and reduce emissions. On the seller side, marketers have been seeking new professional profiles, as their clients have a smaller business profile, considered by the sector to be "retail."

The deregulated market and new demands

With accelerated growth, 31 thousand companies will adopt the deregulated energy market by 2025, according to ANEEL (National Electric Energy Agency).

Deregulated energy market

The deregulated energy market is an environment where participants can freely negotiate the purchase and sale of electricity.

Negotiations can be carried out with individual suppliers or in an auction format, establishing price and payment method, among other variables.

The requirements for buyers are to guarantee a minimum consumption volume and to close a specific supply period. This is an evolution from the captive market, where consumers in a region were required to purchase energy from the local utility at a predetermined price.

The challenges of people management

Energy transition talents

Highly specialized professionals have always been the norm in the energy, oil, and gas industries. However, the energy transition has created new types of demand. Companies traditionally focused on a specific niche are seeking and developing talent with knowledge of (and preferably experience working with) different frameworks and technologies.

There's a demand for professionals with complex problem-solving skills and creative thinking to tackle the challenges of the energy transition. This includes diverse knowledge, a holistic vision, and the ability to engage with experts from different fields in pursuit of common goals.

Specializations in emerging technologies such as smart grids, energy efficiency, biomass, geothermal, energy storage, skilled labor in energy efficiency, smart grid management, and renewable energy are also sought.

Looking for experts in competitors

Highly regulated sectors require specific technical knowledge, constant updating, and, occasionally, up-to-date technical certifications. These characteristics mean that in the oil and gas sector—and, to a lesser extent, in more technical areas of the energy sector—technical professionals at all levels are generally sought after among competing companies. The rapid growth in demand requires the constant recruitment of professionals who can familiarize themselves with the business as quickly as possible.

Back-office, commercial, and legal roles, among others, also require specific knowledge, but it's more common to find professionals willing to migrate from other sectors and specialize. These areas make it easier for companies to hire people who need training or simply acclimation.

Competition for talents

With the unemployment rate for qualified professionals (over 25 years old and with a college degree) at historically low levels — around 3% according to the IBGE (2024) — the competition for talent with specific skills for the energy, oil, and gas sector has become a reality for managers. Selection processes for Integrity Engineering positions with specializations in specific systems are examples of the challenges faced by companies in this market.

Therefore, it's essential to invest in retention and loyalty initiatives for these professionals, valuing their performance within the company and ensuring the possibility of internal career progression. This minimizes the risk of losing talent without resorting to counteroffers, which are often temporary solutions and ineffective in strengthening long-term relationships.

Data from Robert Half shows that 75% of managers, throughout their careers, have made a counteroffer to an employee who, within a short period of time, ended up leaving the company, voluntarily or not.

The challenge of new entrants

In both the renewable energy and oil and gas markets, recent years have been marked by the arrival of new entrants in Brazil. Newly privatized oil fields, wind farms, and photovoltaic installations — newcomers are present in every sector.

Between 2021 and April 2024, energy startups in Latin America raised more than US$750 million in 76 investment rounds, according to the Energy Tech Report 2024, published by Distrito. Brazil represents 80% of this volume, raising US$605.9 million in 61 deals. More than 55% of the 347 energy techs mapped are focused on renewable energy solutions, highlighting the importance of this sector in shaping the region's future.

These new players are often surprised by the complexity of the Brazilian market, not only in terms of regulation, but also in terms of tax and labor laws, and the specificities of market operations. This has generated an unforeseen demand for specialists in legal, financial, and procurement areas, among others.

Because many of these companies have headcount limitations, they often have to resort to projects to meet demands and make necessary adjustments.

The geographical factor

The vast majority of renewable energy, oil, and gas projects are located far from major urban centers. This has created challenges for recruiting companies because the jobs, especially the more technical ones, require candidates to relocate to remote locations where oil and gas drilling, hydroelectric plants, solar farms, or wind turbines are located.

Since most skilled workers are located in large cities, attracting them to positions requires thorough guidance on career opportunities and the creation of benefits packages.

The difficulty, in some cases, stems from the very limited benefits available, as depending on the region where the vacancy is located, there may be fewer healthcare, food, or leisure facilities options. In some places, even basic amenities like good internet access, adequate housing for families, and schools are lacking.

Rising positions

In the renewable energy sector, many of the demands relate to the governance and control structure.

In the oil and gas sector, there is a high demand for technical profiles.

See below

In-demand roles

RENEWABLE ENERGY	OIL AND GAS
Tax Management	Tax Management
Accounting Management	Accounting Management
Implementation Management	Subsea Engineering Management
M&A and New Business Management	Project Management
O&M (Operation and Maintenance) Management	HSE (Safety, Health and Environment) Management
Project Management	Petrophysical Geology
Structured Treasury Management	Quality Engineering
Joint Venture Accounting Specialist	Contract Coordination
Purchasing Specialist	Key Account Manager FPSO
Controllership Specialist	Key Account Manager Offshore
Sustainability Specialist	Key Account Manager Onshore
Structured Treasury Specialist	Treasury Specialist
Energy Efficiency Specialist	FP&A Specialist
Tax Specialist	Accounting Specialist
FP&A	Tax Specialist
PMO	M&A Specialist
Trader	JV (Joint Venture) and Risk Specialist
Accounting Analyst	Cost Controller
Controller Analyst	Legal Counsel
BI Analyst	
Tax Analyst	

Special projects

RENEWABLE ENERGY	OIL AND GAS
PMO	Tax expert
Tax expert	Controllership Specialist
Controllership Specialist	Accounting Specialist
Joint Venture Accounting Specialist	Compliance SOX
Accounting Analyst	Tax Analyst
Tax Analyst	Controller Analyst
BI Analyst	Accounting Analyst
Controller Analyst	

In-demand skills

In the renewable energy sector, there is a high demand for professionals with flexibility and adaptability, as the market is still developing and many processes, such as commercial prospecting in the free energy market, are still under construction. In the oil and gas sector, there is a strong demand for fluent English, as well as technical knowledge that includes highly specific certifications.

SOFT SKILLS	HARD SKILLS
Analytical Capacity	Advanced/fluent English
Flexibility	Undergraduate, Postgraduate, Master's, MBA in the area
Communication	Technical Courses
Joint liability	Governance
Innovative profile	

How to Use Our Salary Table

Percentiles: The salaries for the positions listed in this document do not include bonuses, benefits, or other forms of compensation. We've divided the salary for each position into three percentiles to help you customize salary offers for each role.

25th

Candidate - new to the role or still developing skills relevant to the job.

50th

Candidate - has the necessary experience and possesses most of the skills relevant to the job.

75th

Candidate – has more experience than typical and has all the relevant skills for the job, as well as specializations and certifications.

For more information on percentiles and salary readings, visit the Robert Half Salary Guide.

Salary tables

Average salaries (in Brazilian Reais) in the Renewable Energy and Oil & Gas sectors, derived from interviews and market knowledge of Robert Half consultants:

Oil and gas

POSITIONS	25TH	50TH	75TH
Subsea Engineering Management	30.000	33.000	36.000
Operations Management	24.000	29.000	35.000
Maintenance Management	23.000	28.000	32.000
HSE (Safety, Health and Environment) Management	23.000	27.000	33.000
Project Management	15.000	18.000	20.000
Key Account Manager FPSO	25.000	28.000	30.000
Key Account Manager Offshore	25.000	28.000	30.000
Key Account Manager Onshore	25.000	28.000	30.000
Legal Counsel	25.000	30.000	40.000
Petrophysical Geology	18.000	21.000	23.000
JV (Joint Venture) and Risk Specialist	17.000	19.500	21.000
Accounting Specialist	14.500	17.500	20.500
Tax expert	14.000	16.500	19.000
M&A Specialist	13.500	16.000	18.000
FP&A Specialist	13.000	15.000	17.000
Treasury Specialist	11.000	15.000	17.000
Senior Engineering	16.000	21.000	26.000
Quality Engineering	13.000	15.000	18.000
Cost Controller	14.500	17.500	21.000
Contract Coordination	14.000	17.000	19.000

Renewable energies

POSITIONS	25TH	50TH	75TH
CFO	50.000	60.000	80.000
Treasury Department	44.000	50.000	66.000
FP&A Directorate	42.000	52.000	62.000
M&A Department	40.000	54.000	63.000
M&A Management	27.000	33.000	40.000
Treasury Management (operational + structured)	25.000	36.000	42.000
FP&A Management	24.000	33.000	39.000
Accounting Management	22.000	29.000	36.000
Tax Management	22.000	29.000	36.000
Implementation Management	18.000	25.000	31.000
O&M Management	18.000	25.000	31.000
Purchasing Management	17.000	20.000	25.000
Project Management	17.000	22.000	27.000
Sustainability Management	17.000	20.000	25.000
FP&A Specialist	15.000	17.000	21.000
M&A Specialist	15.000	20.000	25.000
Treasury Specialist (structured)	15.000	20.000	24.000
Accounting Specialist	13.000	15.000	17.000
Tax Specialist (Direct or indirect)	13.000	16.000	17.000
Treasury Specialist (Operational)	13.000	15.000	18.000
Purchasing Specialist	12.000	15.000	18.000
Energy Efficiency Specialist	11.000	14.000	18.000
Sustainability Specialist	9.000	12.000	15.000
Distribution and Transmission Network Engineering	9.500	13.000	16.000
Trader	9.000	12.000	15.000
Tax Analyst	8.400	10.500	12.600

Robert Half

Robert Half Solutions

Robert Half offers talent solutions through various services for companies across different industries.

Executive Search

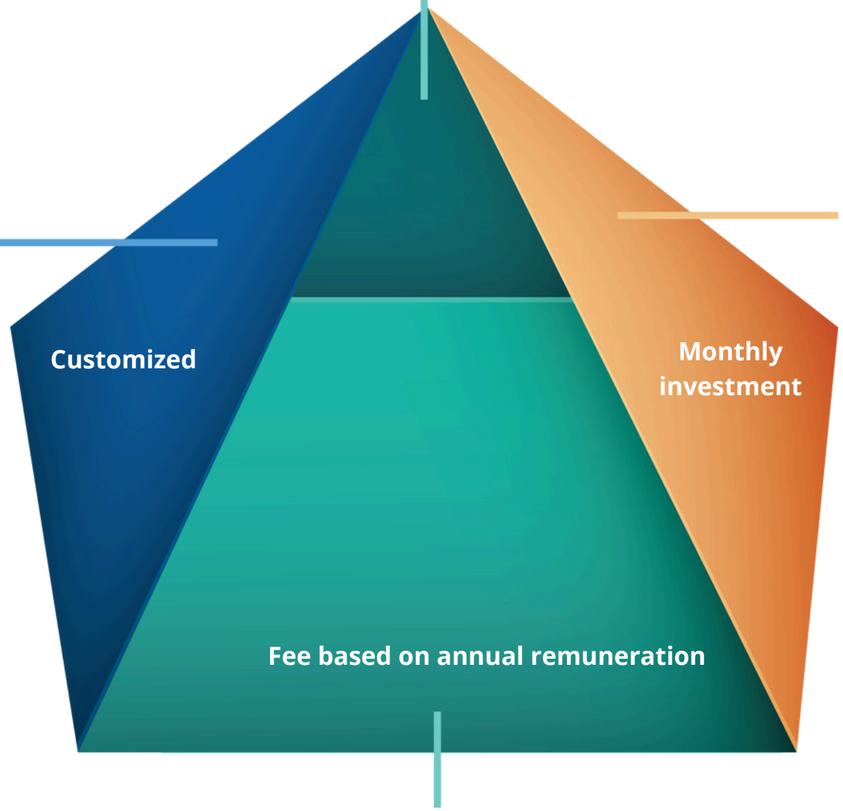
For organizations that recognize that a robust process can significantly impact their direction, we offer a tailor-made approach for sourcing, assessing, and recruiting key professionals.

Consulting

We offer deep consulting expertise, objective insights, and collaboration to help companies tackle challenges and seize opportunities.

Managed Solutions

Through Protiviti, a Robert Half company, we can build high-performing teams that adapt to meet your business needs and goals while providing expert consulting.



Project-based hiring

Management Resources: We allocate specialized professionals to areas of corporate strategic leadership.

Staff Loan: A process in which we allocate skilled professionals to perform transactional corporate routines in the areas of finance, accounting, taxation, auditing, and technology.

Permanent Recruitment

Strengthen your company in the long term by hiring professionals or teams on an indefinite-term basis.

Robert Half Solutions

Robert Half offers talent solutions through various services for companies across different industries.

Rely on the experience of market-specialized consultants and the unique advantages of Robert Half:

Communication: our way of working, proprietary tools, and technology allow us to maintain constant contact with our clients and candidates, keeping them informed at every stage of the recruitment process.

Choices: Each consultant’s network allows access to a wide range of professionals across the country, enabling clients to choose from the best candidates presented.

Match: We work without exclusivity, presenting the most suitable professionals for our clients' needs.

Speed: Candidate selection decisions are made through a collective decision-making process among several consultants, allowing us to present candidates quickly, as a large team is working for each position or project.

About Robert Half

It is the first and largest specialized recruitment company in the world. Founded in 1948, the company operates in Brazil by recruiting permanent professionals and those for specialized projects in the areas of finance, accounting, financial markets, insurance, engineering, technology, legal, human resources, marketing and sales, and executive leadership roles.

With a global presence and operations in North America, Europe, Asia, South America, and Oceania, Robert Half appears on lists of the world’s most admired companies and is also recognized for its commitment to promoting equality and fostering an inclusive culture.

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