

# Deep & Ultra-deepwater Market Update Report To 2014

The sixth edition of this Global Perspectives Report, published by Infield, provides a comprehensive and independent analysis and forecast of issues and trends impacting the development of the global deepwater and ultra-deepwater oil and gas market. The report is essential reading as it assesses the major sectors for this important market.

## The Deepwater Arena:

The year 2009 was a tough one for the global energy industry given the impact of the global economic crisis on oil demand, with oil prices collapsing from \$147 per barrel (p/b) in mid-2008 to \$34 p/b by early 2009. The offshore oil and gas market did not escape unscathed and investment – as elsewhere in the global energy scene – stalled.

However, the longer term trends for deep and ultra-deepwater remain promising, the difficulties of 2009 notwithstanding. As oil demand recovers and onshore hydrocarbon basins continue to mature, efforts to explore and develop deep and ultra-deepwater plays will intensify across the globe.

As a result Infield sees upward potential for all market sectors associated with the deep and ultra-deepwater industry throughout this report's forecast period and not just in the Americas and West Africa regions that have been traditionally dominant in global deepwater investment and production. This report highlights growth in operator investment in deepwater plays in Europe, Asia, Australia and even the Middle East as well.

The report also assesses the major players in the deep and ultra-deepwater market, and analyses which of the market sectors will attract the most Capex between 2010 and 2014. In particular, Petrobras will remain the key global deepwater oil and gas player, while total Capex will mainly be directed towards pipelines and subsea infrastructure. Meanwhile global platform Capex in water depths greater than 1,000 metres is forecast to rise rapidly, which reflects the fact that efforts to extract hydrocarbons further offshore will grow more intense.

Finally, the report provides a brief assessment of the latest offshore oil and gas frontiers – including Brazil's pre-salt reserves, the Gulf of Mexico's Lower Tertiary trend, and offshore natural gas reserves located off the coast of north-west Western Australia. It also looks at potential "game changers" for the offshore oil and gas market, such as Iraq's potential as a major oil producer and the development of unconventional gas in the US and Australia.

Given the context of a rapidly changing and unsettled business environment that the deep and ultra-deepwater market faces, it has become more vital than ever before for operators to access reliable sources of information on this sector. Simply relying on the extrapolation of historic trends will no longer be enough. With all our forecasts built from the bottom upwards - and including accurate up to date project information underpinning every market sector – this sixth edition of the **Deep and Ultra-deep Market Update To 2014** maintains Infield Systems' position as the leading supplier of offshore forecasting, analysis and commentary to operators, contractors, manufacturers and financial institutions alike.

## Who is buying Infield Publications?

Buyers of Infield's reports range from fully integrated oil companies, national oil companies, contractors, service and supply companies, manufacturers and consultants. The reports are used by senior management, market and financial analysts and consultants.

## Why you should buy this report:

- Infield's modelling process, OFFPEX, is based upon a unique "bottom up approach". The component by component, project by project process is robust and has a proven track record
- Timely and accurate analysis on the impact of global economic trends on the offshore oil and gas sector
- Independent and up-to-the minute analysis of the rapidly changing and dynamic deep and ultra-deepwater sector
- Five year forecast for strategic decision making
- Compare and contrast the current forecast with the previous edition to gain a greater understanding of Infield's modelling process and to identify market drivers and dynamics
- Appraise on a regional, country by country, and sectoral basis the capital expenditure and project numbers for each sector of the deep and ultra-deepwater market, including; platforms, subsea, pipelines and control lines

## Report Contents

- **Executive Summary** provides a comprehensive executive overview of the complete market sector
- **Global Market Context** reviews the drivers behind the deepwater business including such issues as the current credit market turmoil, oil price level and its effect on activity, primary energy consumption, analysis of proved oil and gas reserves and oil and gas production, offshore versus onshore market overview and the major supply constraints facing the industry
- **Global Deepwater Business Overview** is a new section designed to provide a clear understanding of the key operators and contractors in the deepwater arena with a particular focus on the subsea tree, leased FPSO and specialist vessel market
- **Regional Analysis & Forecasts** for each region (Africa, Asia, Australasia, Europe, Latin America, Middle East & Caspian and North America) analysis is provided by country and sector for platforms, subsea, pipelines and control line
- **Sector Analysis & Forecasts** Detailed forecasts are provided by the four market sectors; platforms, subsea, pipelines and control lines
- **Global Forecasts Comparison** provides a comparative analysis of the 2009 edition global forecasts with the previous edition to provide a greater understanding of the modelling system and the dynamics of the deepwater business
- **Regional & Sector Maps** provides the reader with a unique visual overview of all deepwater regions, reserves, production, platforms and pipelines



## GLOBAL PERSPECTIVES

**Deep & Ultra-deepwater Market Update 2009/13**

**1 EXECUTIVE SUMMARY**

Recent years have seen the growth and consolidation of the global deepwater offshore industry. It is forecast that the next period of offshore activity will be defined by the impact of the global economic crisis and the impact of the global economic crisis on the offshore oil and gas market. The report provides a comprehensive analysis of the offshore oil and gas market, including a five year forecast for strategic decision making.

Year	2009	2010	2011	2012	2013	2014
Production (m bbl/d)	10.5	11.0	11.5	12.0	12.5	13.0
Reserves (billion bbl)	100	105	110	115	120	125
Investment (\$ billion)	150	160	170	180	190	200

**2 GLOBAL MARKET CONTEXT**

The global market context is a key driver behind the deepwater business. This section reviews the drivers behind the deepwater business including such issues as the current credit market turmoil, oil price level and its effect on activity, primary energy consumption, analysis of proved oil and gas reserves and oil and gas production, offshore versus onshore market overview and the major supply constraints facing the industry.

**3 REGIONAL ANALYSIS & FORECASTS**

Regional analysis is provided by country and sector for platforms, subsea, pipelines and control line. This section provides a detailed analysis of the deepwater market in each region, including a five year forecast for strategic decision making.

Region	2009	2010	2011	2012	2013	2014
Africa	10	12	14	16	18	20
Asia	8	10	12	14	16	18
Australasia	6	8	10	12	14	16
Europe	4	6	8	10	12	14
Latin America	2	4	6	8	10	12
Middle East & Caspian	1	2	3	4	5	6
North America	1	2	3	4	5	6

**4 REGIONAL & SECTOR MAPS**

This section provides a unique visual overview of all deepwater regions, reserves, production, platforms and pipelines. The maps show the geographical distribution of deepwater assets across the globe.

## Searchable Online Projects Database

Purchasers of the Global Perspectives Deep and Ultra-deepwater Market Update will receive 12 months' free access to an online database of fields in water depths of 500 metres and greater being planned or considered for development from 2010 through to 2014, worldwide, via InfieldLive. Details about each project include:

- Field Operator
- Project Name
- Development Type
- Year On Stream
- Date Discovered
- Depletion Date
- Reserves
- Field Production Rates
- Location
- Development Type
- Water Depths
- Project Status
- Numbers of Subsea Wells
- High Temperature / High Pressure

Subscriptions can be upgraded to include other deepwater and shallow water fields or other data sets from the Infield Offshore Energy Database. InfieldLive provides access to the previous day's updates.

## The Infield Energy Analysts

Infield is an independent energy research and analysis firm that is dedicated to the provision of accurate and up-to-date data, market sector reports, mapping, analysis and forecasts to the offshore oil and gas and associated marine industries. Infield services clients in over 40 countries from a wide range of organisations including E&P companies, contractors, manufacturers, government agencies and the financial community. Infield is widely acknowledged as the definitive independent information resource and has been involved in market due diligence concerning mergers, acquisitions and transactions in the energy industry.

## Offshore Energy Database (OED)

The OED provides detailed and up to date information about all worldwide offshore oil and gas fields. The earliest listed project is Bibi Eibat which came on stream in 1923 in Azerbaijan. The furthest ahead are decommissioning projects not expected to proceed for several decades.

Infield comprises 8,750 offshore fields in 127 countries, involving over 950 operators and more than 1,550 participant companies. Infield is updated daily so clients can expect to be kept informed about new projects as and when they happen.

## Global & Regional Perspectives Reports:

Infield publishes a wide range of publications on the offshore oil and gas and associated marine industries, covering sectors and regions;

- Deep & Ultra-deepwater Market Update
- Pipelines & Control Lines Market Update
- Fixed Platforms Market Update
- Subsea Market Update
- Floating Production Market Update
- Specialist Vessels Market Update
- FPSO Market Update
- Accommodation Market Update
- Heavy Lift Market Update
- Heavy Transport Market Update

## Regional Perspectives Reports:

- Asia Pacific Market Update
- Africa Market Update
- Europe Pacific Market Update
- Latin America Market Update
- Middle East Market Update
- North America Market Update

For availability and publication dates, please see InfieldLive.Com for further details.

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