

Offshore Pipelines & Control Lines Market Update Report To 2014

The global recession has impacted the offshore oil and gas industry and consequently the line market through the softening of energy demand and a reduction in available credit. The fifth edition highlights the return of liquidity and the hesitant signs of pick-up within the market and forecasts a steady growth of 6% over the next five years.

The Pipelines & Control Lines Market:

Since 2008, operators' short term strategies and forecast spends have been downgraded with the weakening energy demand and lack of available credit. The global recession has had many impacts on the market, and as such the industry will still feel the effects of this 'down turn' for the short term future. However, with signs of a 'pick up', there is still much potential for growth in the next five years and more.

Pipeline and control line installations have mirrored the trends of the greater offshore oil and gas industry; indicative of their crucial use in the development of hydrocarbon reserves worldwide.

Infield expects pipeline and control line capital expenditure to exceed US \$269bn over the next five years. This equates to 79,799km of lines, of which 55,900km will be pipelines and 23,899km will be control lines. Combined, pipeline and control line installations are expected to see relatively steady growth in the next five years, equating to a compound annual growth rate (CAGR) of over 6%. The previous five years did not see such a high growth – predominantly effected by the downturn. A global pick-up is expected, however in some cases extended growth is different depending on the market sector, field developments and energy requirements of each region.

The SURF market sector is expected to overtake the conventional line market in the forecast period for the first time. The significant growth in the SURF market is driven by a number of large regional developments, including long subsea gas tiebacks in North West Australia, deepwater block developments in Angola, flexible installations in the pre-salt basins of Brazil and numerous subsea to shore lines in Asia and Europe. Whilst this growth is indicative of the industry's trend to discover and develop deeper water reserves, the shallow water developments still hold potential. This is highlighted by the continued strength of the conventional pipeline installation market, all be it at slower growth rates than that of the SURF market.

The trunk/export lines sector will represent the highest percentage growth rate amongst all sectors. Whilst this growth characterises the increasing global demand to diversify the location and type of energy supplies, installation of trunk lines is highly dependent on a number of political, environmental and economical factors. As such, trunk/export lines represent the most volatile section of the pipeline market, and will likely be the most widely affected by the global downturn and the subsequent 'pick up'.

Control lines represent just 30% of the installation market in the forecast period. Growth in this market is mainly attributable to an increase in umbilical installations. Additionally, growth in power lines will begin to influence the market; including lines which are directly associated with the production end of the offshore oil and gas industry and the inter-regional distribution of the power it generates.

For more information please see the **Global Perspectives Pipelines & Control Lines Market Update Report To 2014**.

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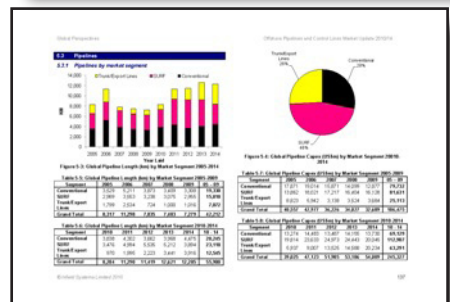
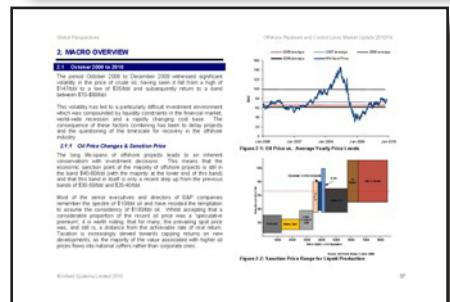
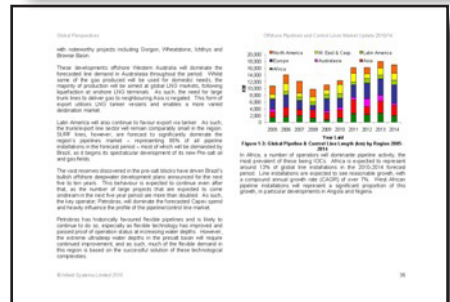
Organisations range from fully integrated oil companies, national oil companies, contractors, service and supply companies, manufacturers and industry consultants located in over 40 countries worldwide. The market forecast reports are used by senior management, industry and financial analysts and consultants for strategic decision making

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
- The report contains the latest information on the probable impact of the current economic circumstances on the offshore oil and gas sector
- Utilise the Infield five year forecast for strategic decision making
- It is an independent and up-to-the minute analysis of the offshore pipelines and control lines sector
- Appraise region by region, country by country and sector by sector capital expenditure and forecast installation lengths for each of the elements within the market

Report Contents

- **Executive Summary** provides a comprehensive overview of the complete market sector
- **Macro Overview** reviews the drivers behind the offshore oil and gas industry including recent oil price changes, the financial impacts on offshore activity, analysis of proved oil and gas reserves and oil and gas production, and the key game changers which could have short and long term impacts on the offshore market
- **Sector Analysis** provides an in-depth review of key trends and drivers in the pipeline and control line markets. This section aims to highlight regions and specific sectors of activity and how they are influenced by regional factors, political influences and operator strategies
- **Regional Forecasts** for each region (Africa, Asia, Australasia, Europe, Latin America, Middle East & Caspian and North America) analysis is provided by country, depth, material, diameter and market segment for pipelines and by country and type for control lines
- **Sector Forecasts** looks more specifically at pipelines by sector (SURF, Conventional & Trunk/export lines) and type (Flexible & Rigid). Control lines are split by type and more detailed analysis of umbilicals by region, water depth and type is also provided
- **Global Forecasts** provides a global overview by region for pipelines and control lines, individually and combined
- **Appendices** provide case studies of major pipeline projects, each including maps produced by Infield's EnergyGateway Online Mapping & GIS System



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Purchasers of the Global Perspectives Pipelines & Control Lines Market Update will receive 12 months' free access to Pipelines Online. Pipelines Online lists major control line and pipeline projects being installed in the current year and four years forward. Details about each project include:

- Operators
- Project Name (Route)
- Product
- Type
- Weight Coat
- Length
- Diameter
- Lay Type
- Vessel Type
- Water Depth

Major projects include; pipelines of 50Km in length and over; pipelines of 16" diameter and greater and 12.5Km in length and over. Major control line projects include; control lines of 25Km in length and over.

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