

# Floating Production Systems Market Update Report 2009/13

The Fifth Edition of the Floating Production Systems Market Update, published by Infield Energy Analysts, provides an in-depth independent forecast analysis; 2004 through to 2013. The new edition has been completely updated to include new prospects and the effects of the credit crunch to provide a global five year forecast.

## The Floating Production Systems Market:

There are currently three main interrelated areas of concern in the contemporary global oil and gas market: potential future under-investment, declining revenues of oil and gas companies due to falling oil prices and the credit crunch leading to recall or repayment of loans as well as the lack of financing.

However, it is important to distinguish between the short-term and long-term prognoses for the industry. The lack of credit and a falling oil price are considered short-term. Longer term, it is expected that new offshore oil and gas developments will continue to face strong market fundamentals. A tightness in supply and decreasing reserve replacement ratios means that accessing new hydrocarbon reserves will remain a priority for oil companies even if demand stays stationary.

Under these circumstances the industry is moving towards deep and ultra-deepwater developments in much more severe environments demanding the use of advanced technology. Deepwater activity is forecast to grow and this is a crucial factor for floating production market growth.

Over the past five years we have seen the growth of capital expenditure in this market. During the forecasting period 2009-2013 we expect further capital intensive technological developments associated with deep and ultra-deepwater projects coupled with an increase in the number of floating production units planned to be installed.

The markets profiled in this report focus upon the four main designs of floating production platforms. Out of the markets for FPSOs, Spars, TLPs and semi-submersibles, the FPSO market is the largest. This reflects the advantages it offers over other development solutions. Speculatively built FPSOs, the FPSO leasing market and yard availability are some of the issues discussed in detail within the report.

The future for the floating production systems industry is still expected to be strong with a variety of water depths, project sizes and locations expected over the next five years. For more information please see the **Global Perspectives Floating Production Systems Market Update 2009/13 Report**.

Please note that the new edition differs from the previous editions in that the report now covers such additional issues as yards availability, key operators and the FPSO leasing market.

The report also includes regional maps extracted from our **EnergyGateway GIS Mapping system**

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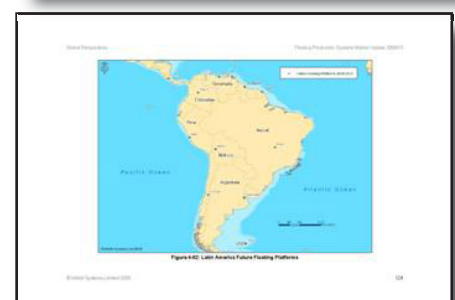
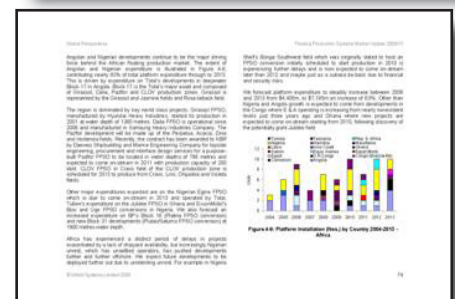
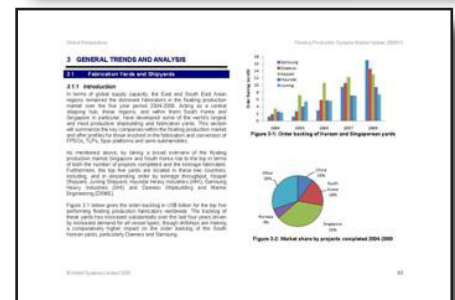
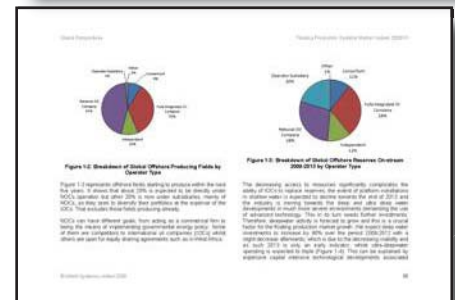
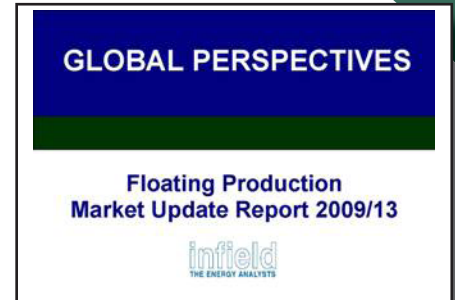
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## Why you should buy this report:

- 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
- It is an independent and up-to-the minute analysis of floating production systems sector
- Utilise the report's five year forecast for strategic decision making
- Appraise the report's region by region, country by country, sector by sector capital expenditure and project numbers analysis for each of the elements within the market

## Report Contents

- **Executive Summary** provides a comprehensive executive overview of the complete market sector
- **Global Market Context** reviews the drivers behind the floating production systems 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
- **General Trends & Analysis** is a new section designed to provide the reader with a clear understanding of the key aspects of the floating production systems business, analysis by key operators and by key fabricators within each section of the market
- **Regional Analysis & Forecasts** for each region (Africa, Asia, Australasia, Europe, Latin America, Middle East & Caspian and North America) analysis is provided by country, sector, water depth and build type
- **Facility Analysis & Forecasts** provides analysis and forecasts of each sector of the market (FPSOs, Spars, TLPs and semi-submersibles) by region and water depth as well as a detailed discussion of the FPSO owners and conversion vs new builds market
- **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 floating production systems business
- **Regional & Sector Maps** are provided throughout the report offering the reader a unique visual overview of all key developments within the floating production sector. The maps are produced by Infield's EnergyGateway Online Mapping & GIS System.



## Searchable Online Projects Database

Purchasers will receive 12 months' free access to Floating Production Systems (Standard) which identifies all FPS facilities being planned or considered for development 2009/13. For each project the following details are provided:

- Operator / Owners / Yards
- Facility Name / Facility Type
- Water Depth
- Location
- Topside Weights / Total Weights
- Project Status
- Topside Function / Product
- Install & Decommissioning Dates
- New Build / Conversion
- Manned / Unmanned
- Access Means
- Numbers Surface Completed Wells

Access is provided through InfieldLive which gives the user access to the latest published data from Infield's research team

Subscriptions can be upgraded to include the operational FPS fleet, FSO's and all fixed platforms, as well as all global fields, subsea development, pipelines, flowlines, control lines and field ownership.

## Offshore Energy Database

The Infield Worldwide Offshore Database provides detailed and up to date information about all offshore fields, worldwide. The earliest project on Infield 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 8,450 offshore fields in 127 countries, involving over 700 operators and more than 1,100 participant companies. Infield is updated daily so clients can expect to be kept informed of new information as and when it happens.

- Shallow Water Fields
- Deepwater Water Fields
- Fixed Platforms
- Floating Production Systems
- Subsea Equipment; Trees, Manifolds, Templates & Subsea Processing
- Trunk Lines, Pipelines Flexible Flowlines
- Control Lines & Umbilicals
- Single Point Moorings
- Specialist Vessels
- Field Operators & Ownership
- FPSO Owners
- Manufacturers

## The Infield Energy Analysts

Infield is an independent energy research and analysis organisation 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 many US\$bn of merger, acquisition and transaction market due diligence.

## Other Global & Regional Perspectives Reports:

- 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
- LNG / GTL Market Update
- FPSO Leasing Market Update
- Accommodation Vessel Market Update
- Asia Pacific Market Update

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