

# Offshore Pipelines & Control Lines Market Update 2008/12

The Third Edition of the **Global Perspectives Offshore Pipelines & Control Lines Market Report**, published by Infield Energy Analysts, provides an in-depth independent analysis of the global offshore pipelines and control lines sector. The reports covers the SURF market as well as the conventional and trunk pipeline markets.

## Market Overview:

The offshore industry has seen steady growth since 2003, which has mainly been driven by the growth in the subsea and floating production markets. This has resulted in an increase in the supporting pipeline infrastructure for these developments. Going forward Infield Energy Analysts expect to see some growth in the pipelines and control lines market, however, it is expected to be a softer growth in subsea-related pipeline installations through to 2012, as this market begins to stabilise. A stronger growth is expected in the trunkline and export line installations if LNG program set backs continue due to staffing shortages.

A slight decline in the control line market is expected, which is driven by the declines in the power line and communication line installations. The umbilicals market is expected to grow going forward, which implies a trend of replacement from single control lines to umbilicals.

Infield Energy Analysts forecasts a total of \$166 billion to be spent within the pipelines and control lines market between 2008 and 2012. We expect that there will be 20,844 km of control lines installed between 2008 and 2012 and for pipelines we expect to witness work on 73,411 km lines in the period 2008-2012.

Asia is expected to account for 28% of the total pipeline installations over the forecast period. This region continues to have growing domestic energy needs fuelled by their rapidly expanding economies. In Africa, 74% of activity is expected to be generated by the West Africa region where numerous developments are forecast in the deep and ultra-deepwaters offshore Angola and Nigeria. Europe is forecast to be the second largest combined market (control lines & pipelines) installed, with a 21% market share. Latin America's activities continue to be dominated by Petrobras in Brazil, who continue to grow from their deepwater discoveries and subsequent developments in the Santos Basin region. It is the North America forecast that is expected to flatten or decline slightly in terms of new installations going forward.

For the full global, regional and sector forecasts, analysis and commentary please see the **Global Perspectives Offshore Pipelines & Control Lines Market Update 2008/12**.

## Why you should buy this report:

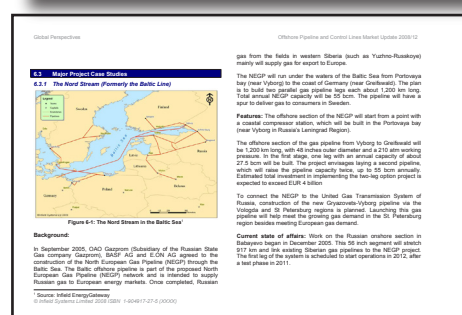
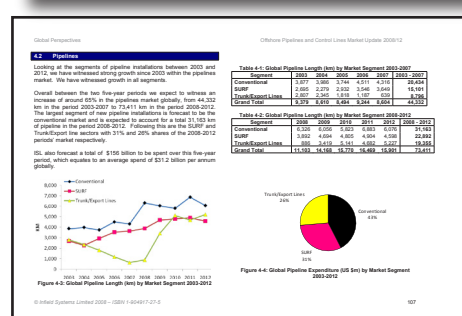
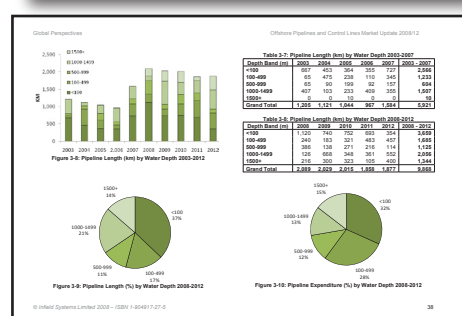
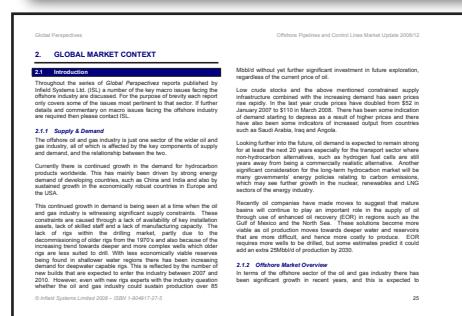
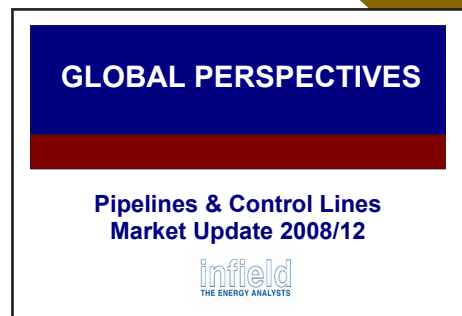
- It is an independent and up-to-the minute analysis of the rapidly changing pipelines and control lines market
- You can utilise the Infield five year forecast for strategic decision making
- By comparing and contrasting the 2008 forecast with the forecasts for 2005 and 2007 you can identify the market drivers and dynamics of this sector
- Appraise region by region, country by country, sector by sector capital expenditure and length forecasts to identify key business areas

## Who should buy this report?

The Global Perspective Market Update Reports have been purchased by senior managers, industry and financial analysts, consultants, government bodies in a wide spectrum of companies and organisations.

## Report Contents

- **Summary & Conclusions** Provides an executive overview of the complete market sector and a comparison of the 2005, 2007 and 2008 forecasts
- **Global Market Context** Looks at the supply and demand issues within the industry, offshore market overview, comparative analysis of the conventional and surf markets with forecast development costs of major projects. Analysis of commodity pricing, price versus activity levels analysis, geopolitical overview including discussions on operator types, including NOCs
- **Regional Analysis & Forecasts** For each region (Africa, Asia, Australasia, Europe, Latin America, Middle East & Caspian and North America) analysis is provided by country, water depth, type, material, diameter, product and burial mode
- **Sector Analysis & Forecasts** Detailed forecasts are provided by the three market sectors; SURF, conventional and trunk lines as well as by type, lay vessel type, burial mode, overall flexible, rigid and CRA sectors
- **Global Forecasts** Provides global forecasts by region for pipelines and control lines, individually and combined
- **Appendices** Provides major projects case studies for Nord Stream, Eastern Caribbean Gas Pipeline, Barrow Island, Trans ASEAN and Sakhalin Export Line



## Searchable Online Projects Database

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 2008 to 2012. 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 projects of 25Km in length and over.

Subscriptions can be upgraded to include other pipelines and control lines or other data sets on the Infield Offshore Energy Database.

## The Infield Energy Analysts

Infield is an independent energy analysis and research 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 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 Perspectives Reports:

- Deep & Ultra-deepwater Technologies & Projects
- Deep & Ultra-deepwater Market Update
- Fixed Platforms Market Update
- Subsea Market Update
- Floating Production Market Update

## 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 8,200 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.

- Fixed Platforms
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- Subsea Trees, Manifolds/Templates
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- Control Lines & Umbilicals
- Single Point Moorings
- Specialist Vessels
- Field Operators & Ownership

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