

Deep & Ultra-deepwater Market Update Report 2009/13

The Fifth Edition of the Global Perspectives Deep & Ultra-deepwater Market Report, published by Infield Energy Analysts, provides an in-depth independent forecast and analysis of the global deepwater and ultra-deepwaters sectors. The report covers all of the major sectors; platforms, subsea, pipelines and control lines, worldwide.

The Deepwater Arena:

Recent years have seen the growth and formalisation of the global deepwater offshore industry. A process that has been driven by increased energy demand stemming from consecutive years of economic growth, the maturing of established hydrocarbon extraction basins, and a growing battle to overcome depleting reserves. Such factors have encouraged operators to invest billions annually chasing this offshore frontier, and across this report we see very few market segments associated with deepwater production not seeing upwards potential.

Despite these positive outlooks, bubbling under the surface a number of issues threaten to combine to derail the deepwater epoch. Severe global economic downturn, decreasing hydrocarbon demand, OPEC having reducing production, and the price of oil consolidating at a point far below the dizzying peak of \$147 reached less than a year ago, and well into the upper regions of project sanction price, to name but a few.

With the profit margins on fields becoming tighter, issues such as dayrates for deepwater capable drilling rigs and specialist vessels, which soared with oil price and are only now starting to fall also, have been restraining certain activities. Personnel and staffing too is becoming increasingly problematic for both contractors and operators alike, as the industry as a whole witnesses a ramping up in activity levels across a greater distribution of operational areas. Add to this issues of local content for those involved in plays away from the US GoM and NWECS, and we can see that this burgeoning industry is one currently under considerable pressure.

Given the context of a rapidly changing and unsettled business environment, it is now more necessary than ever before to have a reliable source of future market information. This is no time for an extrapolation of historic trends. With all our forecasts built from the bottom upwards, with genuine, up to date project information underpinning every market segment, this fifth edition of the **Deep and Ultra-deep Market Update 2009/13** maintains Infield Systems' position as the leading supplier of offshore forecasts, commentary and analysis to operators, contractors, manufactures and financial institutions alike.

Further, by gaining 12 months access to InfieldLive, the purchaser can ensure that they have their fingers on the pulse of the deepwater industry over this challenging period. Online data access provides access to fields on stream 2009 to 2013 worldwide in water depths of 500 metres and greater. Access is provided to the previous day's updates.

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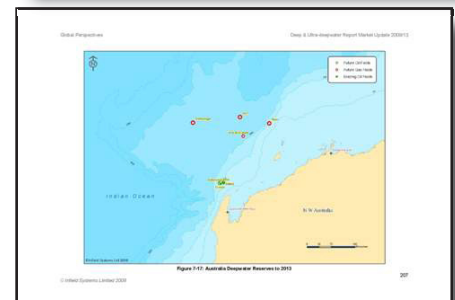
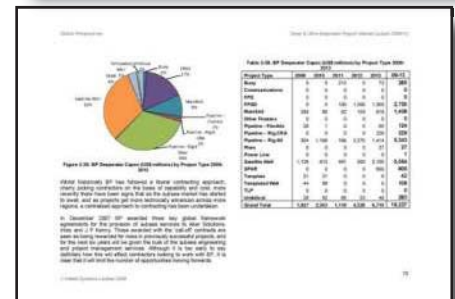
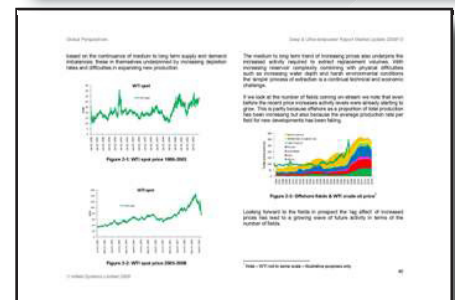
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- The report contains the latest information on the probable impact of the current economic circumstances on the offshore oil and gas sector
- It is an independent and up-to-the minute analysis of the rapidly changing and dynamic deep and ultra-deepwater sector
- Utilise the Infield five year forecast for strategic decision making
- Compare and contrast the current forecast with the previous edition to providing a greater understanding of the modelling process and identify the market drivers and dynamics of this sector
- Appraise region by region, country by country, sector by sector capital expenditure and project numbers for each of the elements within the deep and ultra-deepwater market; platforms, subsea developments, 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



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