# Offshore Pipelines & Control Lines
## Market Update Report To 2014

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**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**.

### Who is buying the Market Update Reports?

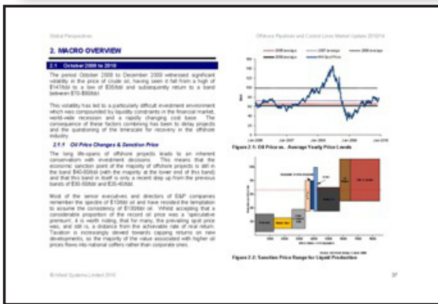
Organisations range from fully integrated oil companies, national oil companies, contractors, service and supply companies, manufacturers and industry consultants located in over 40 countries worldwide. The market forecast reports are used by senior management, industry and financial analysts and consultants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

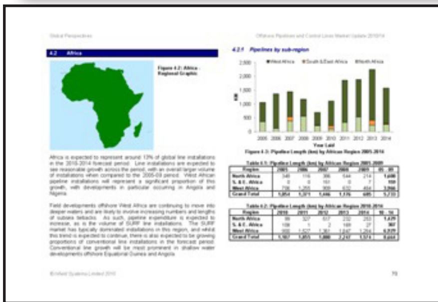
### Why you should buy this report:

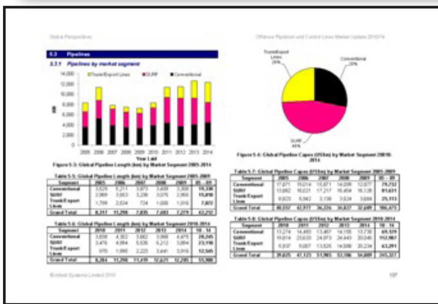
- Infield's modelling process, OFFPEX, is based upon a unique "bottom up approach". The component by component, project by project process is robust and has a proven track record
- The report contains the latest information on the probable impact of the current economic circumstances on the offshore 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



Please note report images are low resolution for inclusion in this brochure

# Online Database www.infieldlive.com

### 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 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.

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

### 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 8,800 offshore fields in 103 countries, involving over 950 operators and more than 1,600 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
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- 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 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.

### Global Perspectives Market Update Reports:

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# CONTENTS LIST

## LIST OF FIGURES



 

## LIST OF TABLES



 

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THE ENERGY ANALYSTS

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The system is straight forward to use, however, it is important that you make sure you can download the File Open Plugin before you request a report in PDF.

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### Adobe Versions:

File Open will work with versions of Adobe Acrobat and Adobe Professional 7 and beyond. if you are using Adobe Acrobat 7 and Adobe Professional 7 you will have problems printing the reports, so if you can we recommend to the latest version available, which can be downloaded from http://www.adobe.com.

### Downloading Your Report:

1. You can download your report from http://www.infieldlive.com/infieldlive. Save the report to your local hard disk. **Do not try and open it yet!**

### Registration of Your Computer:

2. You need to download the FileOpen Plugin which is a JAPPLET file. This is a Java Applet component of a software application. You can download it from http://plugin.fileopen.com/

   You will need administrator rights to your computer, so you may need your system administrator to install the plugin for you if you do not have administrator rights. If you system administrator will not install the plugin then please contact the Infield Team for advice.

3. One you have installed the FileOpen Plugin you must complete the registration process by clicking on the PDF that was attached to your registration email. You must be online. You will then see a PDF document saying that the computer has been successfully registered.

4. Open up Adobe Acrobat or Adobe Reader and go File > Open > open the report. If you get an error message saying that your computer is not registered to open the document, retry steps 2 and 3 above. If that does not work please contact the Infield Team.

5. Once you have opened the report, you can open it as many times as you wish on the registered computer. If you are travelling and are offline you have a period of 5 days you can use the report before you have to open the report online again to "ping" the FileOpen Server which refreshes the document registration.

### Printing The Report:

6. You can print the reports and depending upon the licence you have purchased you have a limited number of print runs. The default licence is a single print. Infield reports are usually landscape can be printed double sided (duplex printing) which is "flipped" so when the report is bound you can see both pages together. If you do not have duplex printing capability then you can print the report single sided.

7. The first time you open the report you sometimes cannot see the print menu. This is because the file has not "pinged" the FileOpen Server correctly. The simple solution is to close the report, close and reopen Adobe and then open the file again. The print menu should be available now, if it is not then please contact the Infield Team.

### Changing Computers & Registered Users:

8. If you change computers or wish to change the registered user for the report then please contact the Infield Team to issue a new registration and cancel the old one.

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