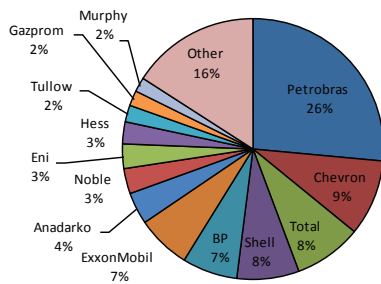


This eagerly awaited eighth edition of the Global Perspectives Deep and Ultra-deepwater Market Report provides a comprehensive analysis of the key regions for deepwater development and growth over the period 2007 to 2016. The forecast focuses on capital expenditure on platforms, subsea, pipelines and control lines at water depths of 500 metres and greater. In addition, the strategies of the key operators investing in the deep and ultra-deepwater arena over the next five years are presented in the context of the prevailing geopolitical conditions and environmental challenges.

As the key growth market within the offshore oil and gas sector and the most capital intensive area for development, the emerging trends within the deep and ultra-deepwater sector reflect the dynamic state of the industry and the level of operator optimism going forwards. With advances in exploration and production technologies combined with a growing geological understanding of deepwater plays, International Oil Companies (IOCs), Independents and National Oil Companies (NOCs) are all looking ahead to an increasing number of prospects within the deepwater market, in both established areas of deepwater development, and in areas previously deemed to be of marginal value. In addition to the environmental and geological challenges of deepwater production, with rising resource nationalism and increasing NOC involvement, geopolitics is set to continue to model the future of deepwater activities going forwards to 2016.

Brazilian giant Petrobras is expected to continue its dominance of the deepwater sector with its projected share of expenditure to 2016 forecast to reach 26% of the total global Capex expenditure. The operator's deepwater spend will predominately centre upon pre-salt assets within the Santos Basin. Expenditure is also expected to remain high for Supermajors: Chevron, Total, Shell, BP and ExxonMobil. The combined investment by the Supermajors and Petrobras is expected to reach 65% of the global deepwater Capex expenditure over the course of the forecast timeframe.

Deepwater Capital expenditure (US\$m) 2012-2016 By Operator



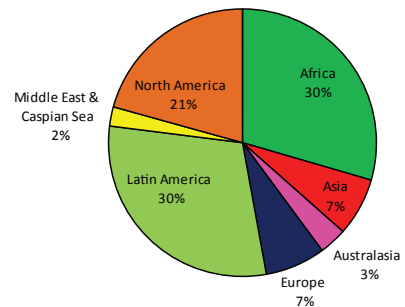
Source: Deepwater Market Report To 2016

Independent operators, such as, Anadarko, Noble Energy, Hess and Tullow are also expected to substantially increase their proportion of capital expenditure within the deepwater market over the forthcoming five years. For Anadarko, the rise in investment is particularly significant, with key projects including the Gulf of Mexico's Lucius project, and exciting new projects offshore Africa.

From a regional perspective, the share of reserves coming on-stream is expected to be highest from the Latin American region – forecast to be

39% of total global reserve additions during the 2012 to 2016 period, with over 60% of such reserves anticipated to be located in Brazil's pre-salt basins. However, the largest deepwater field development expected on-stream during the period is located offshore Australasia at a depth of 1,300 metres, the ExxonMobil-Chevron joint development at Jansz (Greater Gorgon) prospect, is expected to commence production in 2014 with reserves totalling some 2,800mmbbl. Offshore Africa, Infield Systems anticipates strong deepwater investment to continue, with the region holding an equal global deepwater Capex share to that of Latin America at 30% across the 2012-2016 timeframe. Comparatively, North America's Capex share of the market is expected to stand at 21%, followed by Europe and Asia.

Deepwater Capital expenditure (US\$m) 2012-2016 By Region



Source: Deepwater Market Report To 2016

Infield Systems expects the largest proportion of deepwater investment to be directed towards pipeline installations; comprising 39% of total global deepwater expenditure. Latin America and Africa are expected to account for the greatest proportion of deepwater pipeline spend; whilst the single most capital intensive pipeline project is anticipated to be the Gazprom South Stream development at a water depth up to 2,200 metres, a project approved by Russia in December 2011. Deepwater Subsea expenditure is also expected to remain high with projects offshore West Africa forecast to comprise the largest share of Subsea demand over the period.

Prices for the Deep & Ultra-deepwater Market Report To 2016 range from £2,200 for a single printed or single user electronic copy. In addition to the report, an online database of fields in water depths of ≥ 500 metres being planned, or considered for development, over the next five years is also provided. This Deepwater Online (Essentials) database can be upgraded to the full version of Deepwater Online, or to include other services, such as, Subsea Online, Infield Systems' supply chain contracts database or other data sets from the Infield Offshore Energy Database.

Report Contents

- **Executive Summary** provides an overview of the global and regional trends presented throughout the report, with a summary of global capital expenditure by region and market segment.
- **Global Market Overview** provides an overview of market supply and demand fundamentals, oil price trends and the growth of deepwater production and its impact on the global oil market.
- **Global Deepwater Business Overview** presents the major development projects and regional focus of the top six operators: Petrobras, Chevron, ExxonMobil, Shell, Total and BP over the next five years, as well as their longer term exploration and business strategies. Key contractors within the subsea tree market over the forecast period are also presented, in addition to the forecast supply of specialist installation vessels over the period; an integral factor in meeting project completion deadlines.
- **Regional Analysis and Forecast** contains a detailed analysis and forecast for the seven main regions: Africa, Asia, Australasia, Europe, Latin America, Middle East and Caspian, and North America. This section

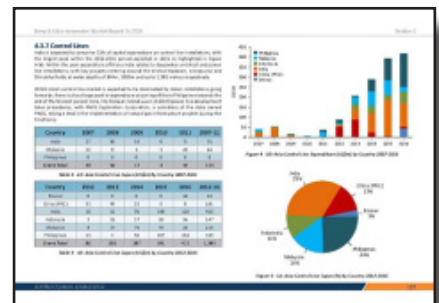
provides an overview of the key trends and prevailing geopolitical conditions affecting regional oil and gas markets, in addition to the key operators present, and the future prospects for each region. Within this section, data is provided on capital expenditure by country, as well as the specific market segments of platforms, subsea infrastructure, pipelines and control lines over the ten year period of analysis (2007-2016).

- **Sector Analysis and Forecast** provides a breakdown, region by region, of forecast capital expenditure on: subsea, platforms, pipelines and control lines. In addition, a regional breakdown of platform installations, number of subsea wells, and installation of pipelines and control lines by length (km) is also presented.
- **Appendices and Maps** includes the latest global maps showing deepwater developments over the 2012 to 2016 period from the Infield Offshore EnergyGateway.



Why You Should Buy This Report

- The report contains data developed by Infield Systems' market modelling process, OFFPEX, which is based on a unique "bottom up approach" to forecasting. OFFPEX's component by component and project by project forecasting process is robust and has a proven track record.
- Deep and Ultra-deepwater is one of the core publications within the Global Perspectives series, and offers an in-depth analysis of the key market segments, countries and operators within this key offshore growth market. With the prospects for the deepwater market increasing, this report also highlights new areas of exploration as well as how advances in technology will enable operators to realise the potential of developments previously considered to be marginal.
- The report provides an independent and comprehensive analysis of the drivers and challenges which are impacting development strategies, exploration activity and project timelines. This is supported by the inclusion of a detailed analysis of operator capital expenditure within the deepwater market over the 2007-2016 timeframe.



Global & Regional Perspectives Market Reports

Infield Systems publishes a range of market reports covering various aspects and regions of the oil, gas, renewable energy and associated marine industries. Utilising comprehensive in-house project databases, industry models and research capacity these reports are widely used by industry analysts and professionals:

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- Heavy Lift
- Heavy Marine Transport
- Remotely Operated Vehicles
- Offshore LNG
- Africa
- Arctic
- Asia
- Australasia
- Latin America
- Middle East & Caspian
- North America

Executive Summary

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 - Forecast Comparison 2011 versus 2010

Appendices, Maps & Notes

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- Platform Maps
- Pipeline Maps
- Glossary
- List of Acronyms and Abbreviations

About This Report

Number of Pages:	223
Number of Figures:	248
Number of Tables:	205

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- Date / Year Discovered
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