

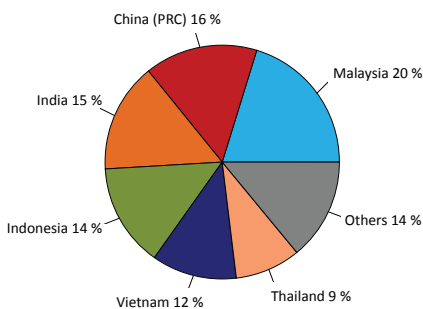
Infield Systems has published the fourth edition of the *Regional Perspectives Offshore Asia Oil and Gas Market Report To 2015*. The new report provides an in-depth analysis of trends and developments impacting Asia's offshore oil and gas industry. In doing so, the report includes a detailed forecast of capital expenditure (Capex) and platform subsea equipment, pipelines, flowlines and control lines installations across the region's offshore markets, as well as including a comprehensive analysis of macro market conditions, potential threats and opportunities.

Supported by high levels of economic activity and energy consumption growth, the Asian offshore oil and gas industry has significant potential as operators seek to meet the region's growing demand. In this latest edition of the *Offshore Asia Oil and Gas Market Report*, the major projects and trends driving offshore development in the Asia region are comprehensively analysed. In the short term, offshore Capex in the region is expected to continue to recover from the low levels seen during the global recession.

During the recession, domestically driven economic growth in China provided buoyancy to the region's major economies which escaped the sharp slowdown seen elsewhere. Despite slowing down marginally in the second quarter of this year, the Chinese economy is still growing at a breakneck pace compared to other industrialising countries. However, the economic giant faces some problems which could slow oil demand growth in the region, including rising inflation and over-investment in infrastructure amid some broader signs of economic overheating and structural weaknesses.

However, together with India, oil demand growth from China (which is expected to continue to remain strong) will be a key driver of investment in offshore exploration and production. Amid near record oil prices, the region's countries have an interest in meeting as much domestic demand as possible to boost energy security. This is particularly the case not only for China and India, the region's giants, but also other major energy producing countries including Malaysia and Indonesia who face production decline if they do not take steps to maintain exploration and production activity. Indonesia, once a major oil exporter, became a net oil importer in 2004 following declining domestic production and rising consumption and withdrew from OPEC in 2008. China became a net oil importer in 1993, and in 2009, surpassed Japan to become the second largest oil-importer in the world.

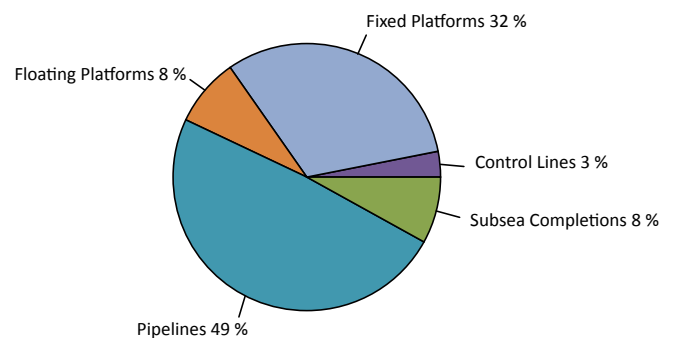
**Asia Capex by country (%) 2006-2015**



Source: Asia Oil & Gas Market Report to 2015

Infield Systems forecast that the region's expected recovery in offshore activity will continue to significantly drive up demand for fixed, floating and subsea units in the short term. With countries such as China, India, Malaysia and Indonesia seeking to expand exploration and production activity in order to maximise local production and minimise imports, the region is expected to remain a global leader in terms of fixed platform installations. Infield Systems forecast that despite the projected growth in Capex, it is unlikely that the region's largest countries will be able to reduce their dependency on crude oil imports. This will provide further support to exploration and production activity in the long run, driven by the region's National Oil Companies including Petronas, Pertamina, CNOOC and ONGC. Meanwhile, new oil frontiers are being opened up, in deeper waters and also in countries such as the Philippines and Myanmar which did not previously have any significant levels of offshore activity. These developments are expected to greatly increase demand for subsea units in a region which traditionally has been dominated by shallow water production. Overall, Infield Systems forecast that this demand will make the region the third highest investor in the world in terms of offshore Capex, behind only Africa and Europe.

**Asia Capex by market sector (%) 2006-2015**



Source: Asia Oil & Gas Market Report to 2015

In addition to this thorough analysis and forecast of Asia's offshore market this report also includes a global macroeconomic overview assessing Infield Systems outlook for the global gas and LNG markets. Furthermore, the report assesses potential global macroeconomic risks which could have an impact on the forecast recovery in the region's offshore oil and gas industry. In sum, this latest edition of Infield Systems' *Offshore Asia Oil and Gas Market Report* is essential reading for those in the industry seeking to understand the latest changes and trends affecting a region which is a major market in the global oil and gas industry.

## Report Contents

- **Executive Summary** provides an overview of the Asia offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the offshore oil and gas market.
- **Macro Overview** reviews the demand drivers behind the global natural gas market, including Infield Systems' current long term outlook for global primary gas demand. It also includes topical information on LNG including costs, prospects and forecasted liquefaction capacity.
- **Regional Market Overview** assesses Asia's key demand and supply trends for oil and gas, taking a long term view on demand in the region. Asia's energy deficit along with other key oil and gas demand drivers are discussed together with the region's demand characteristics. On the supply side, major oil and natural gas plays are identified, as well as the key operators driving development in these fields. These include Bohai Bay, Mumbai High, Sakhalin, Gumusut and Liwan. Furthermore, this section identifies and reviews the major Asian National Oil Companies which are involved in offshore oil and gas development in the region including Pertamina, Petronas, CNOOC, ONGC.
- **Sector Analysis & Forecasts** contains detailed analysis and forecasts for each of the main sectors in the offshore oil and gas industry: fixed platforms, floating production units, pipeline and control lines. Analysis is provided by country, and each sector is analysed by the following sub-sections: platform facility type, water depth, weight, and build; and in addition by diameter and material for pipelines. For the subsea market detailed analysis and forecasts are provided by country, market (development drilling, EPC and installation) and subsea equipment (trees and manifolds), manufacturer and operator. Commentary on key trends and factors within each regional market is also included in this section. Regional maps of forecast platform installations are also included.
- **Appendices** provide regional maps showing overview of current and future oil and gas fields, existing and future floating production systems and fixed platforms.

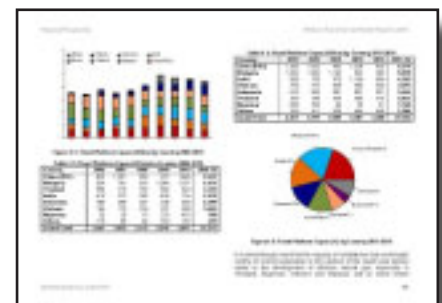
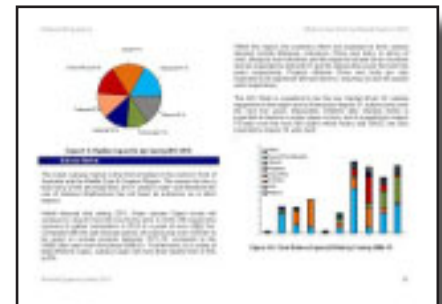
## Why You Should Buy This Report

- 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.
- The reader is given a comprehensive presentation of the offshore market in the Asia region with analysis from macro overviews down to country and operator level in terms of Capex and number of units forecast to be installed.
- Detailed sector analysis appraising the variances in regional, political and country drivers for the Asia offshore oil and gas market providing insight into the trends expected within the market over the next five years.

## Global & Regional Perspectives Market Reports

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



## EXECUTIVE SUMMARY

- Introduction
- Fixed Platform Market
- Floating Production Systems Market
- Pipelines Market
- Subsea Market
- Conclusion

## MACRO OVERVIEW

- Gas and LNG market overview
- Long range global natural gas demand forecasts
- Costs of LNG to market

## REGIONAL MARKET OVERVIEW-ASIA

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  - Regional Energy Demand: Long-Term Outlook
  - Asia's Energy Deficit: More so With Oil than Gas
  - Asia's Varied Energy Characteristics
- Asian Offshore Liquids And Natural Gas Supply
  - Liquids
  - Natural Gas
- Major Offshore Players – Asian National Oil Companies

- China National Offshore Oil Corporation (CNOOC-China)
- Oil and Natural Gas Corporation (ONGC-India)
- PetroVietnam and PTTEP (Vietnam and Thailand)
- Petronas (Malaysia)
- Pertamina (Indonesia)

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## APPENDICES & NOTES

- Defined Regions/Countries List
- Glossary, Acronyms & Abbreviations
  - Glossary
  - Product/Service Definitions
  - Standards of Measurement
- Regional Maps

## About This Report

Number of Pages:	106
Number of Figures:	83
Number of Tables:	71

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