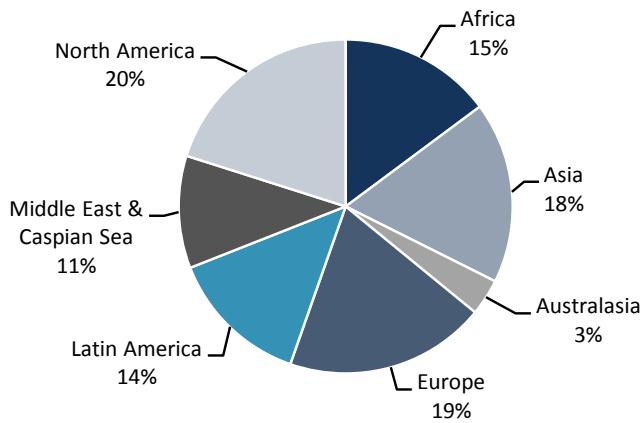


Infield Systems has released the fourth edition of its **Global Perspectives Specialist Vessels Market Report to 2017**, which provides a comprehensive insight into the offshore vessel market. Analysis is focused on the largest sectors of the offshore construction market – pipelay, heavy lift, IRM and construction support, in addition to an overview of the accommodation sector. A global breakdown of the market is presented, followed by a comprehensive regional overview. The report demonstrates the drivers of demand and dynamics of supply, outlining supply voids and potential opportunities and summarising each sector with a day rate and utilisation analysis.

The vessels market has been through a period of significant stress following the global financial crisis and Macondo Blow out which significantly impacted offshore developments and oil companies. The market however has begun a robust recovery, reflecting improving macroeconomic conditions and a buoyant oil price which has restored market confidence and is driving increasing offshore activity. As a result, vessel demand is expected to show strong and consecutive growth up to 2017, with forecast vessel days increasing by 32% compared to the period 2008-2012.



**Global Vessel Demand (Vessel Days) (%) by Region 2013-2017**

Source: Infield Systems' Specialist Vessels Market Report to 2017

North America is expected to require the greatest demand for vessels over the period of analysis, driven primarily by the IRM market. However, the region is expected to decrease in market share due to rapid growth in emerging regions and deterioration of shallow water activity due to the booming shale industry. However, the regional deep and ultra-deepwater market is expected to remain buoyant and will account for an increasing proportion of demand towards the close of the period.

Europe and Asia are expected to be key regions, with growth trends expected across the period. Europe is driven primarily by trunk and control line installation, which is expected to drive a bow-wave of activity in addition to significant demand for SURF installation. Asia is also expected to witness significant demand for line install, but is characterised by activity associated with installation of fixed piled platforms, reflecting the region's shallow water characteristics.

Africa is expected to be the key growth region up to 2017. Demand will be driven by aggressive exploitation of reserves across the predominantly deepwater regions of Nigeria and Angola, in addition to diversification of demand in the shallow water basins offshore Egypt and Libya. Australasia is also expected to witness strong growth despite accounting for only a small proportion of demand, driven by large scale LNG developments off the Western Coast of Australia.

In response to robust growth, a number of vessel operators are undertaking fleet renewal programmes to capitalise upon the growing offshore market and, as a result, vessel supply is expected to increase by 45% across the period of analysis. With increasing activity in deep and remote waters, new-builds are shifting towards high specification assets that are capable of operating in such environments. Despite the majority of demand still remaining in shallow waters, operators are 'future proofing' their vessels, in line with the growth trend in deepwater regions, such as Africa and Latin America. Due to the influx of such vessels, on top of the incumbent shallow water fleet, the supply market is increasingly polarised with respect to capability between the high and low ends of supply.

The regional dynamic of the vessel market is varied and dependent on factors such as water depth and environmental conditions and regulatory factors such as health and safety (HSE) and cabotage regulations. For example, the European fleet is generally considered to be the most advanced in the world, due to stringent HSE regulations and harsh water conditions. North America and Latin America have significantly more polarised tonnage, due to the large supply of low specification assets focused on shallow water demand complemented by high specification assets for the growing deep and ultra-deepwater market.

The significant global fleet of low specification dated assets is pushing the whole market into a broad state of oversupply across all of the key sectors. It is likely that many of these assets have low utilisation rates, and in order to remain economical are engaged within additional markets such as civil marine works. It is the case that the oversupply in the low end of the markets conceals the undersupply at the very high end of demand. This top level view is useful for a broad market overview, but each vessel market has varied dynamics. Within this report, Infield Systems discusses specific sectors at risk of substantial oversupply and identifies where future opportunities may exist.

### About This Report

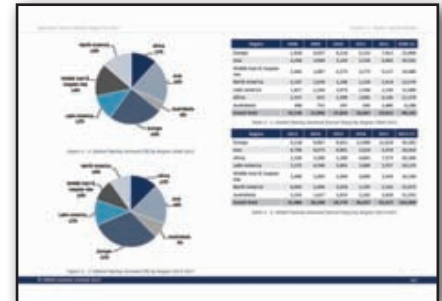
Number of Pages:	450
Number of Figures:	464
Number of Tables:	361

## Report Contents

- **Executive Summary** provides an overview of the vessel market highlighting the main points of the report and identifying the most important trends arising up to 2017.
- **Macro Overview** provides an overview of current economic conditions in both developed and emerging markets, oil price trends and field sanction points, offshore production and reserves, as well as key industry trends, including the impact of unconventional and the growth of LNG on the global market.
- **Global Market Context** reviews the drivers behind global demand and analyses current vessel supply for pipelay, heavy lift, multifunctional and accommodation assets. Demand is split for each vessel sector by region, water depth and market segment. Supply is analysed by cumulative and newbuild activity and split by sphere, operator and capability.
- **Combined Supply and Demand** incorporates the supply and demand analysis and is split by vessel capabilities specific to each sector. This approach

provides a clear view of potential voids in the market space.

- **Day Rate Analysis** reflects the bareboat value for assets within the vessel sectors, calculated from historic contractual values and forecast rates derived from the supply/demand differential.
- **Utilisation Analysis** refers to the proportion of the working year, in this case 250 days, in which a vessel is likely to secure revenue generating work. Figures are modelled on the supply and demand analysis.
- **Regional Market Context** provides detailed analysis for the following regions: Africa, Asia, Australasia, Europe, Latin America, the Middle East and Caspian and North America. For each region, analysis is supplied for the following vessel sectors: Pipelay, Heavy Lift, Multifunctional and Accommodation, with demand split by country and water depth and with key fields identified. This is followed by regional vessel supply split by operator, with significant historic and forecast contracts discussed.



## Why You Should Buy This Report

- The report contains data developed by Infield Systems' market OFFPEX modelling process, which uses 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 report provides an independent and comprehensive analysis of the issues impacting the offshore oil and gas industry in the Specialist Vessels and Accommodation sector today, and how this impacts market developments over the next five years. It enables the reader to make use of the report's five year forecast for strategic decision making in this dynamic sector
- It includes the level of capital expenditure and activities in vessel days for each major offshore oil and gas production country.

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- Subsea
- Subsea Well Intervention
- Africa
- Arctic
- Asia
- Australasia
- Europe
- Latin America
- Middle East & Caspian
- North America

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  - The Retreat of Nuclear Power
  - The Rise of Shale Gas
  - The Internationalisation of Gas Markets
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- Europe (same as Africa)
- Latin America (same as Africa)
- Middle East & Caspian (same as Africa)
- North America (same as Africa)

### APPENDICES & NOTES

- Defined Regions/Countries
- Glossary, Acronyms & Abbreviations
  - Glossary
  - Product/Service Definitions
  - Abbreviations & Standards of Measurement
  - Organisations and Names

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- Previous Name (s)
- Operator
- Group Company
- Owner
- Status
- Year Built
- Delivery Quarter
- ISL Vessel Type
- Summary of Capabilities
- Hull Type
- Length (m)
- Breadth / Width (m)
- Depth (m)
- Transit Speed (knots)
- Accommodation (persons)
- Diameter Band Group
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