

# Offshore Asia Pacific Oil & Gas Market Update Reports 2009/13

**The Second Edition of the Regional Perspectives Offshore Asia Pacific Oil & Gas Market Update, published by Infield Energy Analysts, provides an in-depth independent analysis of the region's deepwater, subsea, floating production, fixed platforms pipelines and control line sectors presented in two volumes.**

**Market Overview:**

The recent heightened awareness of financial risk and lack of available credit has left many global economies and companies re-evaluating their future short-term and long-term strategies. In the global offshore oil and gas industry, this is expected to result in a number of short-term project delays or deferments.

Many of the oil majors were less prone to the over optimism and sanctioning of projects during the high prices of Spring 2008. Consequently, they were more equipped for the months that followed and many maintain relatively positive market positions at present. However, despite this, the overall lack of confidence in the global markets combined with edging on the side of caution has resulted in many operators reducing their projected Capex spend from 2009 onwards. For the Independent operators in particular, this has resulted in the delay of some projects as lack of available financing restricts the level of their progress.

In the emerging market of Asia, the most prominent risk in the current financial conditions is the lack of liquidity in the markets. This essentially sees operators unable to raise the finance to develop fields, a problem which could be made more acute in Asia where many operators are independents. In Australasia, large independent operators have dominated the Capex spend of the previous five year period. This trend is set to continue, with increasing contribution from a number of the major integrated oil companies, such as ExxonMobil, Chevron and Shell.

Despite these market issues, Asia is still expected to represent the second largest share of the global Capex spend in the forecasted 2009-2013 period. With an estimated capital expenditure (Capex) of over \$97 billion through 2009 to 2013, the region is expected to witness an increase of 77% in terms of Capex when compared to the previous five year period.

The Australasian offshore market is expected to grow rapidly in terms of capital expenditure, with over a three-fold increase forecasted for the 2009 to 2013 period compared to the previous five-year period. ISL forecasts that Australia will have \$26.8 billion total capital expenditure over the five-year period 2009-2013, the highest in the region, representing 94% of the total Capex.

For the full country and sector forecasts, analysis and commentary please see the **Regional Perspectives Offshore Asia Pacific Oil & Gas Market Update 2009/13**.

**Who is buying Infield Publications?**

Organisations purchasing reports from the Global Perspective Market Update and Technology & Projects Reports 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 reports are used by senior management, industry and financial analysts and consultants.

**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
- It is an independent and up-to-the minute analysis of Asia and Australasia
- Utilise the report's five year forecast for strategic decision making in these dynamic regions
- Appraise the two regional reports country by country, sector by sector capital expenditure and project numbers analysis for each of the elements within the market; subsea, floating production, fixed platforms, pipelines and control lines

**Report Contents**

- **Offshore Asia Pacific Oil & Gas Market Update** is divided into two volumes. The first volume covers Offshore Asia (India, South East Asia & East Asia) and the second volume covers Australasia (Australia, New Zealand and Papua New Guinea). Each volume follows the same structure and format set out below;
- **Summary & Conclusions** Provides an executive overview of the complete market in the region, by sector and by country, with commentary and analysis
- **Global Market Context** reviews the drivers behind the global offshore oil and gas 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
- **Sector Analysis & Forecasts** for each sector; fixed platforms, floating production, offshore pipelines and control line analysis is provided by country, type (facility, pipeline, control line) water depth, total platform weights, pipeline material, pipeline diameter and pipeline market segment (Conventional, SURF and Trunk Line)
- **Subsea Market Forecasts** provides detailed forecasts for the subsea market including drilling and completion activities and subsea equipment (trees, manifolds and templates)
- **Appendices** Provides regional maps showing overview of activity, future floating production systems, future future fixed platforms and an infrastructure overview
- **Online Access** to InfieldLive providing updated information on fields being planned or considered for development offshore Asia Pacific during the current year and four years forward. Access is provided to the latest published update with over 200 updates each year.



**REGIONAL PERSPECTIVES**

**Offshore Australasia Oil & Gas Market Update 2009/13**

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**REGIONAL PERSPECTIVES**

**Offshore Asia Oil & Gas Market Update Report 2009/13**

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**Offshore Asia Oil & Gas Market Update 2009/13**

**Figure 1.1 - Forecasted Offshore Asia Capex (\$Bn) 2009-2013**

Year	2009	2010	2011	2012	2013
Capex (\$Bn)	100	120	140	160	180

**Figure 1.2 - Forecasted Offshore Asia Capex by Country (\$Bn) 2009-2013**

Country	2009	2010	2011	2012	2013
India	10	15	20	25	30
SE Asia	15	20	25	30	35
EA Asia	20	25	30	35	40

**Regional Perspectives**

**Offshore Asia Oil & Gas Market Update 2009/13**

**Figure 1.3 - Forecasted Offshore Asia Capex by Sector (\$Bn) 2009-2013**

Sector	2009	2010	2011	2012	2013
Fixed Platforms	40	50	60	70	80
Subsea	10	15	20	25	30
Control Lines	5	7	9	11	13

**Regional Perspectives**

**Offshore Asia Oil & Gas Market Update 2009/13**

**Figure 1.4 - Forecasted Offshore Asia Capex by Country (\$Bn) 2009-2013**

Country	2009	2010	2011	2012	2013
India	10	15	20	25	30
SE Asia	15	20	25	30	35
EA Asia	20	25	30	35	40

## Searchable Online Projects Database

Purchasers of the Regional Perspectives Asia Pacific Offshore Oil & Gas Market update receive 12 months access to a database of field projects being planned or considered for development between 2009 and 2013 in Asia Pacific. Access is provided to the latest published database with over 200 updates per year. The following information is provided about each project;

- Field Operator
- Project Name
- Development Type
- Date/Year On Stream
- Date/Year Discovered
- Depletion Date/Year
- Reserves , Oil, Gas & Condensate
- Field Production Rates
- Water Depths
- Project Status
- Numbers of Subsea Wells
- High Temperature / High Pressure

Subscriptions can be upgraded to include all worldwide fields, producing and future, field ownership and data sets covering platforms, subsea, pipelines, control lines, vessels, spms, onshore terminals, lng/gtl facilities as well as being mapped on the Offshore EnergyGateway.

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- Single Point Moorings
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- Field Operators & Ownership

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