Offshore Pipelines & Control Lines Market Update 2008/12

The offshore industry has seen steady growth since 2003, which has mainly been driven by the growth in the subsea and floating production markets. This has resulted in an increase in the supporting pipeline infrastructure for these developments. Going forward, Infield Energy Analysts expect to see some growth in the pipelines and control lines market, however, it is expected to be a softer growth in subsea-related pipeline installations through to 2012, as this market begins to stabilise. A stronger growth is expected in the trunk line and export line installations if LNG programs set back continue due to staffing shortages.

A slight decline in the control line market is expected, which is driven by the declines in the power line and communication line installations. The umbilicals market is expected to grow going forward, which implies a trend of replacement from single control lines to umbilicals.

Infield Energy Analysts forecasts a total of $166 billion to be spent within the pipelines and control lines market between 2008 and 2012. We expect that there will be 20,844 km of control lines installed between 2008 and 2012 and for pipelines we expect to witness work on 73,411 km lines in the period 2008-2012.

Asia is expected to account for 28% of the total pipeline installations over the forecast period. This region continues to have growing demand for energy fuelsled by their rapidly expanding economies. In Africa, 74% of activity is expected to be generated by the West Africa region where numerous developments are forecast in the deep and ultra-deepwaters offshore Angola and Nigeria. Europe is forecast to be the second largest combined market (control lines & pipelines) installed, with a 21% market share. Latin America’s activities continue to be dominated by Petrobras in Brazil, who continue to grow from their deepwater discoveries and subsequent developments in the Santos Basin region. It is the North America forecast that is expected to flatten or decline slightly in terms of new installations going forward.

For the full global, regional and sector forecasts, analysis and commentary please see the Global Perspectives Offshore Pipelines & Control Lines Market Update 2008/12.
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 2008 to 2012. 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 projects of 25Km in length and over.

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

Infield is an independent energy analysis and research organisation 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 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 many US$bn of merger, acquisition and transaction market due diligence.

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