

# Specialist Vessels Market Update Report 2009/12

The first edition of the **Global Perspectives Specialist Vessels Market Update** published by Infield Energy Analysts, provides an in-depth, independent analysis of the global specialist vessels market sector; 2003 through to 2012. The report covers all of the major supply and demand drivers and analysis on key market sectors.

## The Specialist Vessels Market

The global specialised vessel fleet is a fluid asset, with the ability to move between market sectors and regions alike depending upon vessel function and capacity. Despite this inherent fluidity the offshore market is perceived to be under significant pressure, as the fleet has experienced exceptionally high utilisation and consequently high day rates. The market view set out in the report in the short term is that the current economic climate will temper demand. However as the specialist vessel market remains vital to the production of offshore oil and gas, the long term view is that the perceived buoyancy of demand is expected to continue.

The global offshore market is predicted to see extensive investment throughout the years between 2009 and 2012. The whole offshore oil and gas market is expected to peak in 2011 when over US \$103bn is expected to be invested.

## Specialist Vessels Market Update Report:

The purpose of this report is to provide a comprehensive, ground up insight into the global offshore vessel market by providing an analysis of both sides of the supply and demand equation, with further more granular analysis of specific market sectors.

One key element of the report is that it highlights where there are perceived supply voids in the market, which occur when the current global fleet cannot satisfy demand. Analysis is provided to show the size and severity of these voids. In order to show where these supply gaps and inversely, excesses, occur within the offshore market Infield have created a model that places specific vessels into specific projects across a time period that can include historical and future years. By understanding that projects are interlinked, and the market is integrated, a hierarchy of demand can be created in order to show which projects will be completed first and inversely, which projects are viewed to be less important

The report also offers a specific focus upon the heavy lift, lay and IRM markets before going into detail for specific vessel types.

Each market sector is analysed in-depth providing commentary across a broad range of subjects including contract values, day rates and regional play.

The data has been garnered using three Infield databases; the Offshore Energy Database and OFFPEX Market Modelling and Forecasting for the demand side and the Specialist Vessels Database for the supply side of the equation.

## 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

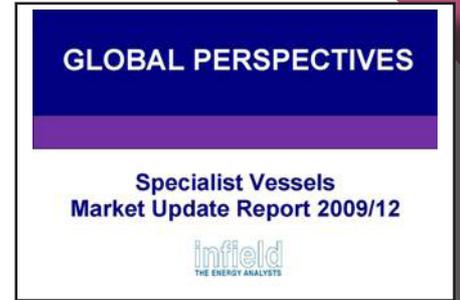
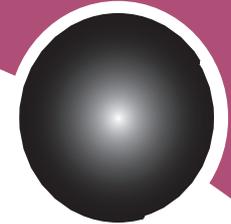
## Why you should buy this report:

- 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 the specialist vessel sector
- Utilise the report's four year forecast for strategic decision making
- Appraise the report's region by region, country by country, sector by sector capital expenditure and project numbers analysis for each of the elements within the market

## Report Contents

- **Executive Summary** provides a comprehensive executive overview of the complete market sector
- **Global Market Context** reviews the drivers behind the offshore specialist vessels market 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
- **Pipelaying and Heavy Lift Markets** analyse supply and demand in the two key areas of the offshore market. The reader is provided with analysis to give a clear understanding of the key aspects behind the two markets, analysis by key regions, water depths and a detailed supply review
- **IRM Market** provides detailed forecasts on the inspection, repair and maintenance sector of the offshore market using a region by region view of demand and a supply side analysis built on the presence of MSV and DSVs
- **Global Overview of Vessel Types and Definitions** provides an overview of the offshore vessel fleet, and details on the status of new builds. Each type of vessel competing in the offshore market is profiled in terms of supply numbers, major players, major operational regions and views on demand and combined supply/demand
- **Appendices** are included at the close of the report to give the reader further understanding of the unique model, and how it is used to compile the report

For more information please see the **Global Perspectives Specialist Vessels Market Update 2009/12**.



## Specialist Vessels Database (SVD)

Originally developed as an internal tool for Infield's team of analysts, the SVD has supported over 100 projects relating to the building, developing, financing or operation of specialist offshore vessels. This has included additions to the offshore fleet with a combined value of over US\$10bn and relating to almost every new build pipelay, heavy lift, construction and accommodation vessels around the world.

The SVD provides project details on the current operational fleet as well as the 190 new build vessels being planned or considered for construction and launch over the coming years.

The major vessel types which are active in the oil and gas industry are included in the SVD;

- Pipe/Cable Lay
- Burial/Trenching
- Heavy Lift
- Heavy Transport
- Multi Service
- Well Intervention
- Construction
- Accommodation
- Installation
- Dive Support
- High End Anchor Handlers

Purchasers of the Global Perspectives Specialist Vessels Market Update 2009/12 Report can upgrade to include a single site three user licence to one years access to the SV for £1,000.00.

## New Companion Report

Infield has also published a companion report to the Specialist Vessels Market Update, the Global Perspectives Accommodation Market Update Report 2009/13.

In its first edition this report establishes Infield as the only supplier of a clear and concise view of the rapidly changing and challenging offshore accommodation market.

The report uniquely takes an entirely independent view throughout and is thus equally valuable to operators and to vessel owners seeking to understand the prominent dynamics that exist within the market.

With all the featured forecasts built from the ground up and based upon genuine up-to-date project information in addition to specific chartering agreements, the report is the most reliable and insightful currently available.

The Global Perspectives Accommodation Market Update Report 2009/13 costs £4,950.00, inclusive of delivery and a one year licence's to the Specialist Vessels Database. Subscribers to the Accommodation Market Update can upgrade to include the Global Perspective Specialist Vessels Market Update Report for an additional £1,000.00.

## The Infield Energy Analysts

Infield is an independent energy research and analysis 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 associated 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.

## Other Global & Regional Perspectives Reports:

- Deep & Ultra-deepwater Market Update
- Pipelines & Control Lines Market Update
- Fixed Platforms Market Update
- Subsea Market Update
- Floating Production Market Update
- Specialist Vessels Market Update
- LNG / GTL Market Update
- FPSO Leasing Market Update
- Accommodation Market Update
- Asia Pacific Market Update

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For upgrades to the Specialist Vessels Database, the Global Perspective Accommodation Market Update, multiple copy discount and corporate wide licences please contact a member of the Infield Team for details.

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