Infield Systems has just released the latest edition of its Offshore North America Oil and Gas Market Report To 2017. This latest report provides a detailed forecast, including oil and gas capital expenditure projections and number of installations, for each of the main sectors in the offshore oil and gas industry, including: fixed platforms, floating production systems, subsea production units, pipelines and control lines; whilst also providing an overview of the demand and supply for vessels in the North American region, as well as an assessment of potential deepwater activity.

Over the next five years, the North American offshore market is expected to see a 51% increase in levels of expenditure compared to the previous five year period. Historically, North America has been dominated by developments in the US Gulf of Mexico and this trend is expected to continue; with Infield Systems expecting the US GoM area to account for 90% of the region’s capital expenditure. As shallow water reserves decline, operators have been expanding their explorations into ever deeper waters, with the forecast period expected to witness an 86% increase in Capex for projects situated in water depths greater than 1,000 metres. Key deep and ultra-deepwater developments expected to feature significantly over the period 2013-2017 include: the Anadarko-led Heidelberg and Lucius developments, the Shell-operated Stones and Appomattox developments, and ExxonMobil’s Hadrian North project, although some uncertainty surrounds this project and it may be subject to some re-design.

During the forecast, Canada is also projected to see increased levels of Capex spend. Seen as a new frontier for development, the Arctic region has been attracting increasing operator and media interest. However, significant challenges exist for operators wanting to pursue activities in these highly protected waters, with environmental opposition remaining strong. This factor, in addition to the higher development costs associated with the harsh Arctic conditions, poses a significant challenge and potential risk to operators. Indeed, Shell has recently announced a temporary halt to its operations in the Beaufort and Chukchi Seas.

In terms of operator activity, Shell is expected to account for the highest Capex during the forecast, with the company expected to direct 97% of its offshore expenditure towards developments within the US GoM. Here, the operator is expected to develop its second most capital intensive development globally after West Africa’s Bonga Southwest, with the Stones and Appomattox ultra-deepwater developments projected to account for a significant share of the operator’s spend during the 2013-2017 timeframe. The largest proportion of the development’s spend is expected to be directed towards a new-build semi-submersible installation, with Infield Systems forecasting the FPS to account for 44% of the entire field development’s Capex requirement.

Other key operators include Anadarko and ExxonMobil. 79% of Anadarko’s Capex is expected to be required by field developments in water depths over 1,499 metres, with the greatest depths expected to be seen on the Lloyd Ridge Cheyenne East prospect where subsea expenditure is expected during the years 2013 and 2014. The most capital intensive project for the US Independent after Lucius is finished is expected to be the Heidelberg project, with the subsea element and Spar installation demanding the largest proportion of expenditure.

ExxonMobil is forecast to direct Capex to both US and Canadian assets, with recent project sanctions including the giant Julia tie-back within the US GoM’s Walker Ridge area. Despite Shell’s hiatus in operations in the Arctic, ExxonMobil remains undeterred, with 5% of its projected expenditure directed towards Canadian-Arctic assets. Chevron is expected to see lower levels of offshore expenditure over the forecast, with Capex targeted at a smaller number of fields than previously. However, Chevron’s average expenditure per field development is forecast to increase, primarily as a result of the operator’s increasing focus on capital intensive deepwater developments.

The subsea completions market is likely to see the highest investment over the period of analysis, with developments in the deepwater areas of the Gulf of Mexico expected to drive demand. With exploration in deeper waters increasing, subsea completion expenditure will inevitably rise. The North American market will see satellite wells continue to dominate market Capex, and as a result, subsea manifolds are also likely to see a boost in expenditure.

The pipeline market will continue to attract significant Capex, with the US GoM accounting for around 82% of the market’s expenditure. SURF lines account for the largest proportion of the pipeline market predominantly as a result of deepwater activity in the US GoM, with a large number of subsea tie-ins to floating platforms required. In terms of trunk lines, the forecast increase in expenditure is due to the increasing number of installations expected offshore USA and Canada.

Almost 75% of offshore platform expenditure will relate to floating platforms, mainly associated with projects in the US GoM. In terms of Fixed platforms, 80% of Capex is forecast to be directed towards fields in Canada, with one of the largest projects being ExxonMobil’s Hebron platform. The Fixed Platform market has been historically dominated by the US, however, as shallow water development opportunities have declined, Canada is likely to overtake the US GoM and may drive the largest share of spend over the next five years.
Report Contents

- **Executive Summary** provides an overview of the North American offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the market.

- **Global Market 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 un-conventionals and the growth of LNG on the global market.

- **Sector Analysis and Forecasts**:  
  - **Fixed Platforms** provides an overview of the fixed platform market followed by a detailed discussion of key operators and developments. In-depth analysis of fixed platforms by country, by type (Piled, Jack-up, Gravity, Caisson), by water depth and by weight band is also provided.
  
  - **Floating Production Systems** contains a market overview as well as a detailed forecast for the FPS market, including Capex and number of installations by operator, by country, by type (Semi-Submersible, FPSO, Spar, TLP, Other Floaters), by water depth and by build. Key developments are also discussed.

- **Subsea** includes a sector overview as well as a detailed forecast for the Subsea market, including Capex and number of installations by operator, by country, by sector (Equipment, Drilling & Completion) and development type (Subsea Tree, Subsea Separation, Manifold, Template, Plet), and by water depth. Key developments are also discussed.

- **Pipelines and Control Lines** provides an overview of the sector and the key operators and developments. Further detailed analysis is then provided about pipelines by country, by market segment (Trunk/Export Lines, SURF, Conventional), by water depth, by material and by diameter, whilst control lines are reviewed by country and by type.

- **Deep and Ultra-Deepwater** looks at the outlook for deepwater development in the region, including Capex projections by operator, by country and by sector (Platforms, Subsea, Pipelines and Control Lines). Key deepwater developments are also discussed.

- **Specialist Vessels** provides in-depth forecasts for regional vessel demand (vessel days) and supply (units), including contract awards, for the major markets - Pipelay, Heavy Lift, Multifunctional (IRM, Construction Support) and Accommodation.

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