As demand for energy continues to increase, the search for vital energy resources is expanding further offshore into harsher and deeper waters. Whilst deepwater reserve additions are expected to remain a marginal proportion of overall global production; rising from a 7% cumulative share of global reserves in 2012 to an expected 10% share by 2017, in Capex terms, the deepwater market, which requires considerably higher capital expenditure than its shallow water counterparts, is expected to rise from a 38% share in 2012 to a 53% share of global offshore Capex by the year 2017. This growth, whilst centring upon the ‘Deepwater Triangle’ of Brazil, West Africa and the North American Gulf of Mexico, is also expected to be supported by less traditional areas of deepwater development, including offshore South East Asia, Australasia and Europe; whilst this latest market update to 2017 also sees substantial growth in deepwater development offshore Middle East and Caspian.

Global Deepwater Capital Expenditure (US$m) by Region 2013-2017

Development offshore Brazil is expected to lead the global deepwater market going forwards to 2017; with expenditure expected to centre around the Lula and Franco developments. However, with Brazil’s economy growing at an unprecedented pace, the following period is also expected to be pivotal in the development of Brazil’s offshore reserves and a testing time for its NOC Petrobras.

Within the North American region, the Gulf of Mexico deepwater market is expected to continue to gain in strength post-Macondo, with activities expected to be led by IOC Shell, holding a 24% market share of capital expenditure on deepwater developments; with the ultra-deepwater Stones and Appomattox projects expected to be central to this investment.

Offshore Africa, Angolan developments are expected to be at the forefront of deepwater investment, with the country forecast to hold a 52% share of the regional Capex spend. Here, key prospects anticipated to command significant expenditure include: the Kaombo I and II fields, Lucapa and BP’s PAJ. However, whilst West Africa is expected to remain the primary driving force of deepwater development within the region going forwards, towards the end of the period, deepwater activity offshore East Africa is expected to increase, with development of the Prosperidade complex offshore Mozambique expected to draw particular industry attention and substantial expenditure.

Offshore Asia key fields anticipated to enter production during the forecast include: Liwan offshore China; Shell’s Gomusut-Kakap development offshore Malaysia; and the Gendalo-Geheim project, developed by Chevron offshore Indonesia and expected to enter production in 2016. Over the following five year period Infield Systems also expects a growing diversity in deepwater production within the region, with new areas of development including: Brunei, Myanmar and Sri Lanka emerging towards the end of the current forecast period.

European deepwater demand is expected to increase substantially, with the giant Aasta Hansteen expected to be the third most capital intensive deepwater field development globally over the timeframe. In operator terms, Statoil is expected to form the largest market share going forwards, with other key players expected to include: Chevron; directing significant spend towards the Rosebank development, and Gazprom, leading the South Stream project, also expected to invest heavily within the European deepwater market going forwards to 2017.

Propects offshore North Western Australia have attracted considerable attention over recent years, with capital expenditure commencing on the Chevron and ExxonMobil operated Greater Gorgon area during 2011. Going forwards, the deepwater market offshore North Western Australia is expected to increase its global market share from 1% to 3%, with ExxonMobil expected to lead development spend as a result of significant expenditure on the Jansz field and the long-awaited Scarborough development.

Offshore Middle East, whilst remaining the smallest market for deepwater development spend, Infield Systems expects Independent operator Noble Energy to drive investment, with the giant gas developments offshore Israel expected to demand the largest spending as a result of substantial expenditure on the Jansz field and the long-awaited Scarborough development.
**Why You Should Buy This Report**

- The report contains data developed by Infield Systems’ market modelling process, OFFPEX, which is based on 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.

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