High oil prices have driven new interest in sub-Saharan Africa’s under-explored basins in recent years, with new exploration uncovering a number of plays that have the potential to substantially boost regional production and exports. With geological similarities to the sedimentary basins offshore Brazil, increasing exploration attention is also going to be paid to the potential of West African pre-salt prospects. Explorations continue offshore and onshore Angola, Namibia, Gabon and Congo (Brazzaville).

The African market remains dominated by Angola, and to a lesser and decreasing extent by Nigeria. Throughout the period from 2008-2012, some of the most capital intensive developments globally took place in these waters, with the most notable projects including BP’s PSVM and Total’s Pazflor offshore Angola, and Total’s Akpo and Usan developments in Nigeria. Recent years have also witnessed the expansion of development across the region, with Ghana’s giant Jubilee development recognised as one of the five most capital intensive projects across the region during the timeframe.

In operator terms, French giant Total is expected to continue to dominate the African market. The Kaombo I and Kaombo II field developments are expected to lead demand offshore Angola going forwards, whilst offshore Nigeria the giant Egina is anticipated to require 72% of the operator’s expected Capex spend within the country’s waters. Altogether, the operator is expected to form a 19% share of the African market going forwards to 2017, with the pipeline market sector expected to comprise the largest proportion of the French Super Major’s spend during this timeframe.

Chevron’s market share is expected to witness some of the largest growth in offshore spend compared with the period 2008 to 2012, with the largest drivers of the US IOC’s demand expected to relate to activities offshore Angola; on the Luca field specifically, whilst the Mafumeira development will also require significant spend by the operator. Offshore Nigeria, Chevron’s key projects over the period are likely to include Nsiko and Okan area associated gas recovery, whilst further expenditure is also expected offshore Congo (Brazzaville).

From a market sector perspective, the largest share of Capex spend within the African region is expected to be attributable to the pipeline market. Developments which are expected to command significant pipeline spend going forwards to 2017 include the Okan area fields, Nigeria, specifically the Olokola LNG Project, where Capex is expected during the years 2016 and 2017. Subsea market share is expected to become the second largest market sector in terms of operator spend within the region over the forecast, although the actual percentage share of the subsea market compared to the previous five year period is expected to decline by 9% of total Capex.

Over the forecast, the platform sector is expected to witness the largest proportionate growth in Capex. A key project driving this increase in spend is Total’s Egina development, where an FPSO is expected to come on-stream at the very end of the forecast, in 2017/18.
Why You Should Buy This Report

• Executive Summary provides an overview of the African offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the market.

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• Sector Analysis and Forecasts:

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  – Subsea includes a sector overview as well as a detailed forecast for the Subsea market, including Capex and number of installations by operator, by sector (Equipment, Drilling & Completion) and development type (Subsea Tree, Subsea Separation, Manifold, Booster Pump), 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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• Detailed sector analysis appraising the variances in regional and country drivers for the African offshore oil and gas market, providing insight into the trends expected within the market over the next five years.

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CONTENTS LIST

1. EXECUTIVE SUMMARY ................................................................................................................................. 33
   1.1 Macro Overview ............................................................................................................................................. 33
   1.2 Offshore Development Forecast ................................................................................................................. 33

2. MACRO MARKET OVERVIEW ......................................................................................................................... 43
   2.1 Introduction .................................................................................................................................................. 43
   2.2 Global Economic Update ............................................................................................................................... 44
      2.2.1 Developed Economies .......................................................................................................................... 44
         2.2.1.1 Eurozone ......................................................................................................................................... 44
         2.2.1.2 United States ................................................................................................................................. 44
         2.2.1.3 Japan .............................................................................................................................................. 44
      2.2.2 Emerging Markets .................................................................................................................................. 45
         2.2.2.1 China .............................................................................................................................................. 45
         2.2.2.2 India .............................................................................................................................................. 45
         2.2.2.3 Brazil ............................................................................................................................................. 45
   2.3 Oil Markets ................................................................................................................................................... 46
      2.3.1 Short Term Price Dynamics .................................................................................................................... 46
      2.3.2 Long Term Price Dynamics .................................................................................................................... 48
      2.3.3 Base Case Scenario ................................................................................................................................. 48
         2.3.3.1 Oil Glut Scenario ........................................................................................................................... 49
         2.3.3.2 Commodity Super-Cycle Scenario ................................................................................................. 49
   2.4 Gas Markets .................................................................................................................................................. 50
      2.4.1 A New Demand Trajectory ..................................................................................................................... 50
      2.4.2 The Retreat of Nuclear Power ................................................................................................................ 51
      2.4.3 The Rise of Shale Gas ............................................................................................................................. 52
      2.4.4 The Internationalisation of Gas Markets ................................................................................................. 53
   2.5 Field Sanction Points .................................................................................................................................... 54
   2.6 Production Cost Curve .................................................................................................................................... 55
   2.7 Oil Companies & Contractors ...................................................................................................................... 56
      2.7.1 Oil Companies ....................................................................................................................................... 56
      2.7.2 Oilfield Services ..................................................................................................................................... 57
      2.7.3 Drilling .................................................................................................................................................. 58
      2.7.4 Fabrication Yards .................................................................................................................................. 59
   2.8 Offshore Production & Reserves ................................................................................................................... 60
      2.8.1 Undeveloped Oil & Gas Reserves ......................................................................................................... 61
Offshore Africa Oil and Gas Market Report to 2017

3. AFRICAN FIXED PLATFORMS
   3.1 Market Overview ................................................................. 77
   3.2 Operators ............................................................................ 77
   3.3 Key Developments .............................................................. 78
   3.4 Fixed Platforms by Country .................................................. 82
   3.5 Fixed Platforms by Type ...................................................... 83
   3.6 Fixed Platforms by Water Depth .......................................... 87
   3.7 Fixed Platforms by Weight .................................................... 91

4. AFRICAN FLOATING PRODUCTION SYSTEMS .................................. 105
   4.1 Market Overview ................................................................. 105
   4.2 Operators ............................................................................ 106
   4.3 Key Developments .............................................................. 111
   4.4 FPS by Country .................................................................. 112
   4.5 FPS by Type ...................................................................... 116
   4.6 FPS by Water Depth ............................................................ 120
   4.7 FPS by Build ...................................................................... 124

5. AFRICAN SUBSEA ........................................................................... 133
   5.1 Market Overview ................................................................. 133
   5.2 Operators ............................................................................ 134
   5.3 Key Developments .............................................................. 139
   5.4 Subsea by Country .............................................................. 140
   5.5 Subsea by Sector ................................................................ 143
   5.6 Subsea by Water Depth ......................................................... 150
# Offshore Africa Oil and Gas Market Report to 2017

6. **AFRICAN PIPELINES & CONTROL LINES** ................................................................. 159  
   6.1 Market Overview ........................................................................................................ 159  
   6.2 Operators .................................................................................................................. 160  
   6.3 Key Developments ..................................................................................................... 164  
   6.4 Pipelines by Country .................................................................................................. 165  
   6.5 Pipelines by Market Segment .................................................................................... 169  
   6.6 Pipelines by Water Depth .......................................................................................... 172  
   6.7 Pipelines by Material ................................................................................................ 176  
   6.8 Pipelines by Diameter .............................................................................................. 179  
   6.9 Control Lines by Country .......................................................................................... 183  
   6.10 Control Lines by Type ............................................................................................. 187  

7. **AFRICAN DEEP & ULTRA-DEEPWATER.** ......................................................... 193  
   7.1 Market Overview ........................................................................................................ 193  
   7.2 Operators .................................................................................................................. 194  
   7.3 Key Developments ..................................................................................................... 198  
   7.4 Deepwater Development by Country ....................................................................... 199  
   7.5 Deepwater Platforms ............................................................................................... 202  
   7.6 Deepwater Subsea .................................................................................................... 206  
   7.7 Deepwater Pipelines ............................................................................................... 209  
   7.8 Deepwater Control Lines ......................................................................................... 215  

8. **AFRICAN SPECIALIST VESSELS** ....................................................................... 229  
   8.1 Market Overview ........................................................................................................ 229  
   8.2 Pipelay Market .......................................................................................................... 230  
      8.2.1 Regional Demand (Vessel Days) ......................................................................... 230  
      8.2.2 Regional Vessel Supply (Units) and Contract Awards ........................................ 235  
   8.3 Heavy Lift Market ...................................................................................................... 238  
      8.3.1 Regional Demand (Vessel Days) ......................................................................... 238  
      8.3.2 Regional Vessel Supply (Units) and Contract Awards ........................................ 242  
   8.4 Multifunctional Market ............................................................................................. 244  
      8.4.1 Regional Demand (Vessel Days) ......................................................................... 244  
      8.4.2 Regional Vessel Supply (Units) and Contract Awards ........................................ 252  
   8.5 Accommodation Market ............................................................................................ 255  
      8.5.1 Regional Demand (Vessel Days) ......................................................................... 255  
      8.5.2 Regional Vessel Supply (Units) and Contract Awards ........................................ 259  

Global Perspectives

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9. APPENDICES & NOTES ................................................................. 263
  9.1 Defined Regions/Countries ......................................................... 263
  9.2 Glossary, Acronyms & Abbreviations ........................................ 264
    9.2.1 Glossary ........................................................................ 264
    9.2.2 Product/Service Definitions .............................................. 265
    9.2.3 Abbreviations & Standards of Measurement ....................... 266
    9.2.4 Organisations and Names ................................................. 269
LIST OF FIGURES

Figure 1 - 1: Africa Capex (US$m) by Country 2008-2017 .......................................................... 34
Figure 1 - 2: Africa Capex (%) by Country 2008-2012 ................................................................. 34
Figure 1 - 3: Africa Capex (%) by Operator 2013-2017 ............................................................... 34
Figure 1 - 4: Africa Capex (US$m) by Operator 2008-2017 .......................................................... 36
Figure 1 - 5: Africa Capex (%) by Operator 2008-2012 ............................................................... 36
Figure 1 - 6: Africa Capex (%) by Operator 2013-2017 ............................................................... 36
Figure 1 - 7: Africa Capex (US$m) by Market Segment 2008-2017 .............................................. 38
Figure 1 - 8: Africa Capex (%) by Market Segment 2008-2012 ................................................. 38
Figure 1 - 9: Africa Capex (%) by Market Segment 2013-2017 .................................................. 38
Figure 2 - 1: Brent Price (Annual Average) .............................................................................. 46
Figure 2 - 2: Brent Trading Range ............................................................................................. 46
Figure 2 - 3: Fiscal Breakeven Oil Prices - OPEC Countries ...................................................... 47
Figure 2 - 4: Long Term Price Scenarios .................................................................................... 48
Figure 2 - 5: Global Oil Supply & Demand Balance in 2020 ...................................................... 49
Figure 2 - 6: Global Gas Demand Forecast .............................................................................. 50
Figure 2 - 7: OECD vs. Non-OECD Gas Demand Forecast ...................................................... 50
Figure 2 - 8: Global Energy Demand Forecast (2013-2018) ...................................................... 51
Figure 2 - 9: Gas Price Forecast ............................................................................................... 52
Figure 2 - 10: LNG Share of Global Gas Supply ....................................................................... 53
Figure 2 - 11: Field Sanction Points By Water Depth (m) ........................................................... 54
Figure 2 - 12: Average Field Sanction Points By Water Depth (m) ............................................ 54
Figure 2 - 13: Production Cost Curves ..................................................................................... 55
Figure 2 - 14: Offshore Backlogs: OFS Majors .................................................................... 57
Figure 2 - 15: Offshore Operating Margin: OFS Majors ............................................................. 57
Figure 2 - 16: Global Rig Fleet By Operational Status ............................................................... 58
Figure 2 - 17: Rigs Under Contract ......................................................................................... 58
Figure 2 - 18: Oil Production Trends – Onshore vs. Offshore .................................................... 60
Figure 2 - 19: Future Oil Production Requirement ................................................................... 60
Figure 2 - 20: Undeveloped 2P Oil & Gas Reserves Growth (%) 2009-2012 ......................... 61
Figure 2 - 21: Undeveloped 2P Oil Reserves By Region ......................................................... 62
Figure 2 - 22: Undeveloped 2P Gas Reserves By Region ......................................................... 63
Figure 2 - 23: Oil Prices & Deepwater Developments ............................................................... 64
Figure 2 - 24: Undeveloped Deepwater Reserves By Country .................................................. 65
Figure 2 - 25: Oilfields by On-Stream Year, Reserves Size and Water Depth ......................... 65
Figure 2 - 26: Gasfields by On-Stream Year, Reserves Size and Water Depth ....................... 65
Figure 2 - 27: Maximum & Average Tieback Distance .............................................................. 66
Figure 2 - 28: Discovered Offshore Arctic Fields ..................................................................... 66
Figure 2 - 29: Discovered Offshore Arctic Resources ............................................................... 67
Figure 4 - 1: FPS Capex (US$m) by Operator 2008-2017
Figure 4 - 2: FPS Capex (%) by Operator 2008-2012
Figure 4 - 3: FPS Capex (%) by Operator 2013-2017
Figure 4 - 4: FPS Installations (Nos.) by Operator 2008-2017
Figure 4 - 5: FPS Installations (%) by Operator 2008-2012
Figure 4 - 6: FPS Installations (%) by Operator 2013-2017
Figure 4 - 7: FPS Capex (US$m) by Country 2008-2017
Figure 4 - 8: FPS Capex (%) by Country 2008-2012
Figure 4 - 9: FPS Capex (%) by Country 2013-2017
Figure 4 - 10: FPS Installations (Nos.) by Country 2008-2017
Figure 4 - 11: FPS Installations (%) by Country 2008-2012
Figure 4 - 12: FPS Installations (%) by Country 2013-2017
Figure 4 - 13: FPS Capex (US$m) by Type 2008-2017
Figure 4 - 14: FPS Capex (%) by Type 2008-2012
Figure 4 - 15: FPS Capex (%) by Type 2013-2017
Figure 4 - 16: FPS Installations (Nos.) by Type 2008-2017
Figure 4 - 17: FPS Installations (%) by Type 2008-2012
Figure 4 - 18: FPS Installations (%) by Type 2013-2017
Figure 4 - 19: FPS Capex (US$m) by Water Depth (m) 2008-2017
Figure 4 - 20: FPS Capex (%) by Water Depth (m) 2008-2012
Figure 4 - 21: FPS Capex (%) by Water Depth (m) 2013-2017
Figure 4 - 22: FPS Installations (Nos.) by Water Depth (m) 2008-2017
Figure 4 - 23: FPS Installations (%) by Water Depth (m) 2008-2012
Figure 4 - 24: FPS Installations (%) by Water Depth (m) 2013-2017
Figure 4 - 25: FPS Capex (US$m) by Build 2008-2017
Figure 4 - 26: FPS Capex (%) by Build 2008-2012
Figure 4 - 27: FPS Capex (%) by Build 2013-2017
Figure 4 - 28: FPS Installations (Nos.) by Build 2008-2017
Figure 4 - 29: FPS Installations (%) by Build 2008-2012
Figure 4 - 30: FPS Installations (%) by Build 2013-2017
Figure 4 - 31: Africa Existing FPS Installations
Figure 4 - 32: Africa Future FPS Installations
Figure 5 - 1: Africa Subsea Capex (US$m) by Operator 2008-2017
Figure 5 - 2: Africa Subsea Capex (%) by Operator 2008-2012
Figure 5 - 3: Africa Subsea Capex (%) by Operator 2013-2017
Figure 5 - 4: Africa Subsea Tree Installations by Operator 2008-2017
Figure 5 - 5: Africa Subsea Tree Installations (%) by Operator 2008-2012
Figure 5 - 6: Africa Subsea Tree Installations (%) by Operator 2013-2017
Figure 5 - 7: Africa Subsea Trees Awards by Manufacturer 2008-2012
Figure 5 - 8: Africa Subsea Trees Awards (%) by Manufacturer 2008-2012

Figure 5 - 9: Africa Subsea Capex (US$m) by Country 2008-2017

Figure 5 - 10: Africa Subsea Capex (%) by Country 2008-2012

Figure 5 - 11: Africa Subsea Capex (%) by Country 2013-2017

Figure 5 - 12: Africa Subsea Tree Installations by Country 2008-2017

Figure 5 - 13: Africa Subsea Tree Installations (%) by Country 2008-2012

Figure 5 - 14: Africa Subsea Tree installations (%) by Country 2013-2017

Figure 5 - 15: Africa Total Subsea Capex (US$m) by Sector 2008-2017

Figure 5 - 16: Africa Total Subsea Capex (%) by Sector 2008-2012

Figure 5 - 17: Africa Total Subsea Capex (%) by Sector 2013-2017

Figure 5 - 18: Africa Subsea Trees by Development Type 2008-2017

Figure 5 - 19: Africa Subsea Trees (%) by Development Type 2008-2012

Figure 5 - 20: Africa Subsea Trees (%) by Development Type 2013-2017

Figure 5 - 21: Africa Subsea Equipment Capex (US$m) by Type 2008-2017

Figure 5 - 22: Africa Subsea Equipment Capex (%) by Type 2008-2012

Figure 5 - 23: Africa Subsea Equipment Capex (%) by Type 2013-2017

Figure 5 - 24: Africa Subsea Equipment Installations by Type 2008-2017

Figure 5 - 25: Africa Subsea Equipment Installations (%) by Type 2008-2012

Figure 5 - 26: Africa Subsea Equipment Installations (%) by Type 2013-2017

Figure 5 - 27: Africa Subsea Capex (US$m) by Water Depth (m) 2008-2017

Figure 5 - 28: Africa Subsea Capex (%) by Water Depth (m) 2008-2012

Figure 5 - 29: Africa Subsea Capex (%) by Water Depth (m) 2013-2017

Figure 5 - 30: Africa Subsea Tree Installations by Water Depth (m) 2008-2017

Figure 5 - 31: Africa Subsea Tree Installations (%) by Water Depth (m) 2008-2012

Figure 5 - 32: Africa Subsea Tree Installations (%) by Water Depth (m) 2013-2017

Figure 5 - 33: Existing West African Oil and Gas Fields

Figure 5 - 34: Future West African Oil and Gas Fields

Figure 5 - 35: Existing West African Oil and Gas Fields

Figure 5 - 36: Future West African Oil and Gas Fields

Figure 6 - 1: African Pipeline Capex (US$m) by Operator 2008-2017

Figure 6 - 2: African Pipeline Capex (%) by Operator 2008-2012

Figure 6 - 3: African Pipeline Capex (%) by Operator 2013-2017

Figure 6 - 4: African Pipeline Length (km) Installations by Operator 2008-2017

Figure 6 - 5: African Pipeline Length (%) Installations by Operator 2008-2012

Figure 6 - 6: African Pipeline Length (%) Installations by Operator 2013-2017

Figure 6 - 7: African Pipeline Capex (US$m) by Country 2008-2017

Figure 6 - 8: African Pipeline Capex (%) by Country 2008-2012

Figure 6 - 9: African Pipeline Capex (%) by Country 2013-2017

Figure 6 - 10: African Pipeline Length (km) Installations by Country 2008-2017
Figure 7 - 2: Africa Deepwater Capex (%) by Operator 2008-2012
Figure 7 - 3: Africa Deepwater Capex (%) by Operator 2013-2017
Figure 7 - 4: Africa Deepwater Capex (US$m) by Country 2008-2017
Figure 7 - 5: Africa Deepwater Capex (%) by Country 2008-2012
Figure 7 - 6: Africa Deepwater Capex (%) by Country 2013-2017
Figure 7 - 7: Africa Deepwater Platform Capex (US$m) by Country 2008-2017
Figure 7 - 8: Africa Deepwater Platform Capex (%) by Country 2008-2012
Figure 7 - 9: Africa Deepwater Platform Capex (%) by Country 2013-2017
Figure 7 - 10: Africa Deepwater Platform Capex (US$m) by Water Depth (m) 2008-2017
Figure 7 - 11: Africa Deepwater Platform Capex (%) by Water Depth (m) 2008-2012
Figure 7 - 12: Africa Deepwater Platform Capex (%) by Water Depth (m) 2013-2017
Figure 7 - 13: Africa Deepwater Subsea Capex (US$m) by Country 2008-2017
Figure 7 - 14: Africa Deepwater Subsea Capex (%) by Country 2008-2012
Figure 7 - 15: Africa Deepwater Subsea Capex (%) by Country 2013-2017
Figure 7 - 16: Africa Deepwater Subsea Capex (US$m) by Water Depth (m) 2008-2017
Figure 7 - 17: Africa Deepwater Subsea Capex (%) by Water Depth (m) 2008-2012
Figure 7 - 18: Africa Deepwater Subsea Capex (%) by Water Depth (m) 2013-2017
Figure 7 - 19: Africa Deepwater Pipeline Capex (US$m) by Country 2008-2017
Figure 7 - 20: Africa Deepwater Pipeline Capex (%) by Country 2008-2012
Figure 7 - 21: Africa Deepwater Pipeline Capex (%) by Country 2013-2017
Figure 7 - 22: Africa Deepwater Pipeline Installations (KM) by Country 2008-2017
Figure 7 - 23: Africa Deepwater Pipeline Installations (%) by Country 2008-2012
Figure 7 - 24: Africa Deepwater Pipeline Installations (%) by Country 2013-2017
Figure 7 - 25: Africa Deepwater Pipeline Capex (US$m) by Water Depth (m) 2008-2017
Figure 7 - 26: Africa Deepwater Pipeline Capex (%) by Water Depth (m) 2008-2012
Figure 7 - 27: Africa Deepwater Pipeline Capex (%) by Water Depth (m) 2013-2017
Figure 7 - 28: Africa Deepwater Control Line Capex (US$m) by Country 2008-2017
Figure 7 - 29: Africa Deepwater Control Line Capex (%) by Country 2008-2012
Figure 7 - 30: Africa Deepwater Control Line Capex (%) by Country 2013-2017
Figure 7 - 31: Africa Deepwater Control Line Installations (KM) by Country 2008-2017
Figure 7 - 32: Africa Deepwater Control Line Installations (%) by Country 2008-2012
Figure 7 - 33: Africa Deepwater Control Line Installations (%) by Country 2013-2017
Figure 7 - 34: Africa Deepwater Control Line Capex (US$m) by Water Depth (m) 2008-2017
Figure 7 - 35: Africa Deepwater Control Line Capex (%) by Water Depth (m) 2008-2012
Figure 7 - 36: Africa Deepwater Control Line Capex (%) by Water Depth (m) 2013-2017
Figure 7 - 37: North Africa Deepwater Fields
Figure 7 - 38: North Africa Deepwater Pipelines
Figure 7 - 39: North Africa Deepwater Platforms
Figure 7 - 40: West Africa Deepwater Fields
LIST OF TABLES

Table 1 - 1: Africa Capex (US$m) by Country 2008-2012 ................................................................. 35
Table 1 - 2: Africa Capex (US$m) by Country 2013-2017 ................................................................. 35
Table 1 - 3: Africa Capex (US$m) by Operator 2008-2012 ................................................................. 37
Table 1 - 4: Africa Capex (US$m) by Operator 2013-2017 ................................................................. 37
Table 1 - 5: Africa Capex (US$m) by Market Segment 2008-2012 ................................................... 39
Table 1 - 6: Africa Capex (US$m) by Market Segment 2013-2017 ................................................... 39
Table 2 - 1: Global Economic Indicators ......................................................................................... 45
Table 3 - 1: Africa Fixed Platform Capex (US$m) by Operator 2008-2012 ........................................ 79
Table 3 - 2: Africa Fixed Platform Capex (US$m) by Operator 2013-2017 ........................................ 79
Table 3 - 3: Africa Fixed Platform Installations (No.s) by Operator 2008-2012 ............................... 80
Table 3 - 4: Africa Fixed Platform Installations (No.s) by Operator 2013-2017 ............................... 80
Table 3 - 5: Africa Fixed Platform Capex (US$m) by Country 2008-2012 ......................................... 84
Table 3 - 6: Africa Fixed Platform Capex (US$m) by Country 2013-2017 ......................................... 84
Table 3 - 7: Africa Fixed Platform Installations (No.s) by Country 2008-2012 ............................... 85
Table 3 - 8: Africa Fixed Platform Installations (No.s) by Country 2013-2017 ............................... 85
Table 3 - 9: Africa Fixed Platform Capex (US$m) by Type 2008-2012 ............................................. 88
Table 3 - 10: Africa Fixed Platform Capex (US$m) by Type 2013-2017 .......................................... 88
Table 3 - 11: Africa Fixed Platform Installations (No.s) by Type 2008-2012 ................................. 89
Table 3 - 12: Africa Fixed Platform Installations (No.s) by Type 2013-2017 .................................... 89
Table 3 - 13: Africa Fixed Platform Capex (US$m) by Water Depth (m) 2008-2012 ....................... 92
Table 3 - 14: Africa Fixed Platform Capex (US$m) by Water Depth (m) 2013-2017 ....................... 92
Table 3 - 15: Africa Fixed Platform Installations (No.s) by Water Depth (m) 2008-2012 ............... 93
Table 3 - 16: Africa Fixed Platform Installations (No.s) by Water Depth (m) 2013-2017 ............... 93
Table 3 - 17: Africa Fixed Platform Capex (US$m) by Total Weight Band (Metric Tonnes) 2008-2012 . 96
Table 3 - 18: Africa Fixed Platform Capex (US$m) by Total Weight Band (Metric Tonnes) 2013-2017 . 96
Table 3 - 19: Africa Fixed Platform Installations (No.s) by Total Weight Band (Metric Tonnes) 2008-2012 . 97
Table 3 - 20: Africa Fixed Platform Installations (No.s) by Total Weight Band (Metric Tonnes) 2013-2017 . 97
Table 4 - 1: FPS Capex (US$m) by Operator 2008-2012 ............................................................... 107
Table 4 - 2: FPS Capex (US$m) by Operator 2013-2017 ............................................................... 107
Table 4 - 3: FPS Installations (Nos.) by Operator 2008-2012 ......................................................... 110
Table 4 - 4: FPS Installations (Nos.) by Operator 2013-2017 ......................................................... 110
Table 4 - 5: FPS Capex (US$m) by Country 2008-2012 ............................................................... 113
Table 4 - 6: FPS Capex (US$m) by Country 2013-2017 ............................................................... 113
Table 4 - 7: FPS Installations (Nos.) by Country 2008-2012 ......................................................... 115
Table 4 - 8: FPS Installations (Nos.) by Country 2013-2017 ......................................................... 115
Table 4 - 9: FPS Capex (US$m) by Type 2008-2012 ............................................................... 117
Table 4 - 10: FPS Capex (US$m) by Type 2013-2017 ............................................................... 117
Table 4 - 11: FPS Installations (Nos.) by Type 2008-2012 ........................................................... 119
Table 4 - 12: FPS Installations (Nos.) by Type 2013-2017
Table 4 - 13: FPS Capex (US$m) by Water Depth (m) 2008-2012
Table 4 - 14: FPS Capex (US$m) by Water Depth (m) 2013-2017
Table 4 - 15: FPS Installations (Nos.) by Water Depth (m) 2008-2012
Table 4 - 16: FPS Installations (Nos.) by Water Depth (m) 2013-2017
Table 4 - 17: FPS Capex (US$m) by Build 2008-2012
Table 4 - 18: FPS Capex (US$m) by Build 2013-2017
Table 4 - 19: FPS Installations (Nos.) by Build 2008-2012
Table 4 - 20: FPS Installations (Nos.) by Build 2013-2017

Table 5 - 1: Africa Subsea Capex (US$m) by Operator 2008-2012
Table 5 - 2: Africa Subsea Capex (US$m) by Operator 2013-2017
Table 5 - 3: Africa Subsea Tree Installations by Operator 2008-2012
Table 5 - 4: Africa Subsea Tree Installations by Operator 2013-2017
Table 5 - 5: Africa Subsea Trees Awards by Manufacturer 2008-2012
Table 5 - 6: Africa Subsea Capex (US$m) by Country 2008-2012
Table 5 - 7: Africa Subsea Capex (US$m) by Country 2013-2017
Table 5 - 8: Africa Subsea Tree Installations by Country 2008-2012
Table 5 - 9: Africa Subsea Tree Installations by Country 2013-2017
Table 5 - 10: Africa Total Subsea Capex (US$m) by Sector 2008-2012
Table 5 - 11: Africa Total Subsea Capex (US$m) by Sector 2013-2017
Table 5 - 12: Africa Subsea Trees by Development Type 2008-2012
Table 5 - 13: Africa Subsea Trees by Development Type 2013-2017
Table 5 - 14: Africa Subsea Equipment Capex (US$m) by Type 2008-2012
Table 5 - 15: Africa Subsea Equipment Capex (US$m) by Type 2013-2017
Table 5 - 16: Africa Subsea Equipment Installations by Type 2008-2012
Table 5 - 17: Africa Subsea Equipment Installations by Type 2013-2017
Table 5 - 18: Africa Subsea Capex (US$m) by Water Depth (m) 2008-2012
Table 5 - 19: Africa Subsea Capex (US$m) by Water Depth (m) 2013-2017
Table 5 - 20: Africa Subsea Tree Installations by Water Depth (m) 2008-2012
Table 5 - 21: Africa Subsea Tree Installations by Water Depth (m) 2013-2017

Table 6 - 1: African Pipeline Capex (US$m) by Operator 2008-2012
Table 6 - 2: African Pipeline Capex (US$m) by Operator 2013-2017
Table 6 - 3: African Pipeline Length (km) Installations by Operator 2008-2012
Table 6 - 4: African Pipeline Length (km) Installations by Operator 2013-2017
Table 6 - 5: African Pipeline Capex (US$m) by Country 2008-2012
Table 6 - 6: African Pipeline Capex (US$m) by Country 2013-2017
Table 6 - 7: African Pipeline Length (km) Installations by Country 2008-2012
Table 6 - 8: African Pipeline Length (km) Installations by Country 2013-2017
Table 6 - 9: African Pipeline Capex (US$m) by Market Segment 2008-2012
Table 7 - 17: Africa Deepwater Capex (US$m) by Water Depth (m) 2008-2012
Table 7 - 18: Africa Deepwater Capex (US$m) by Water Depth (m) 2013-2017
Table 7 - 19: Africa Deepwater Control Line Capex (US$m) by Country 2008-2012
Table 7 - 20: Africa Deepwater Control Line Capex (US$m) by Country 2013-2017
Table 7 - 21: Africa Deepwater Control Line Installations (KM) by Country 2008-2012
Table 7 - 22: Africa Deepwater Control Line Installations (KM) by Country 2013-2017
Table 7 - 23: Africa Deepwater Control Line Capex (US$m) by Water Depth (m) 2008-2012
Table 7 - 24: Africa Deepwater Control Line Capex (US$m) by Water Depth (m) 2013-2017
Table 8 - 1: African Pipelay Demand (Vessel Days) by Country 2008-2012
Table 8 - 2: African Pipelay Demand (Vessel Days) by Country 2013-2017
Table 8 - 3: African Pipelay Demand (Vessel Days) by Water Depth 2008-2012
Table 8 - 4: African Pipelay Demand (Vessel Days) by Water Depth 2013-2017
Table 8 - 5: Cumulative African Pipelay Vessel Supply (Units) by Operator 2008-2012
Table 8 - 6: Cumulative African Pipelay Vessel Supply (Units) by Operator 2013-2017
Table 8 - 7: African Heavy Lift Demand (Vessel Days) by Country 2008-2012
Table 8 - 8: African Heavy Lift Demand (Vessel Days) by Country 2013-2017
Table 8 - 9: African Heavy Lift Demand (Vessel Days) by Water Depth 2008-2012
Table 8 - 10: African Heavy Lift Demand (Vessel Days) by Water Depth 2013-2017
Table 8 - 11: Cumulative African Heavy Lift Vessel Supply (Units) by Operator 2008-2012
Table 8 - 12: Cumulative African Heavy Lift Vessel Supply (Units) by Operator 2013-2017
Table 8 - 13: African IRM Demand (Vessel Days) by Country 2008-2012
Table 8 - 14: African IRM Demand (Vessel Days) by Country 2013-2017
Table 8 - 15: African Construction Support Demand (Vessel Days) by Country 2008-2012
Table 8 - 16: African Construction Support Demand (Vessel Days) by Country 2013-2017
Table 8 - 17: African Combined Multifunctional Demand (Vessel Days) by Country 2008-2012
Table 8 - 18: African Combined Multifunctional Demand (Vessel Days) by Country 2013-2017
Table 8 - 19: African Combined Multifunctional Demand (Vessel Days) by Water Depth 2008-2012
Table 8 - 20: African Combined Multifunctional Demand (Vessel Days) by Water Depth 2013-2017
Table 8 - 21: Cumulative African Multifunctional Vessel Supply (Units) by Operator 2008-2012
Table 8 - 22: Cumulative African Multifunctional Vessel Supply (Units) by Operator 2013-2017
Table 8 - 23: African Accommodation Demand (Vessel Days) by Country 2008-2012
Table 8 - 24: African Accommodation Demand (Vessel Days) by Country 2013-2017
Table 8 - 25: African Accommodation Demand (Vessel Days) by Water Depth 2008-2012
Table 8 - 26: African Accommodation Demand (Vessel Days) by Water Depth 2013-2017
Table 8 - 27: Cumulative African Accommodation Vessel Supply (Units) by Operator 2008-2012
Table 8 - 28: Cumulative African Accommodation Vessel Supply (Units) by Operator 2013-2017