Infield Systems has just released the latest edition of its Offshore Australasia 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 platforms, subsea production units, pipelines and control lines; whilst also providing an overview of the demand and supply for vessels in the Australasian region, as well as an assessment of potential deepwater activity.

The rapid industrialisation of Asia-Pacific’s developing economies has driven a global commodities boom, of which Australasia, and in particular Australia, has been a primary beneficiary, and GDP growth projections suggest that Australia remains one of the best places to do business in Asia-Pacific.

Historically, the Australasian region has been dominated by developments offshore North Western Australia and this is a trend that is expected to continue over the forthcoming period, with the rapidly expanding LNG market being the main driving factor in offshore investment growth.

Indeed, Australia has the potential to become a world leader of exports by the end of the decade, if it can overcome the significant investment costs associated with recent developments in the area. Although Australia faces strong international competition in the future, its geographical location makes it ideal to supply gas to countries such as China and Japan which are large importers of natural gas. Over the period of analysis, Infield Systems expects to see an increase in the development of FLNG technology in the country in particular, with expenditure expected to be directed towards a total of nine FLNG FPSO units during the forthcoming period.

Despite Papua New Guinea’s regional share of market Capex declining over the next five years, the country is still expected to see increased levels of expenditure. Papua New Guinea is currently developing a number of LNG liquefaction facilities, with four planned and one currently under construction. With the country looking to tap into the global LNG market it will need to keep investment levels strong within its hydrocarbon industry in order to supply foreign demand.

New Zealand’s demand for offshore oil and gas infrastructure is expected to decline over the 2013-2017 timeframe, with Infield Systems expecting to see a 44% reduction in expenditure. Only two offshore fields are expected to require capital expenditure offshore New Zealand during the timeframe; the Todd Energy-operated Karewa field, where a fixed platform development is expected, and the Kupe/Kupe South development operated by Origin Energy.

In terms of operator expenditure, Infield Systems expects to see Woodside remain the premier operator in the region over the forthcoming five years. Indeed, whilst recent years have seen a marked growth in the level of investment into the region by international operators, Australia’s leading Independent has remained the most significant operator, not only in terms of investment, but also production. Japan’s Inpex is also expected to continue to invest substantially in the region, with the largest proportion of expenditure directed towards the Ichthys LNG project. Chevron is likely to retain third position in terms of spend during the next five years, with the company’s Wheatstone project expected to account for 40% of its expenditure over the forecast to 2017. In addition, Chevron has also remained a key investor in the Gorgon project.

ExxonMobil will continue to play an important role in the region’s offshore oil and gas developments, with the company injecting all of its projected expenditure on projects in Australia. Infield Systems expects the US Super Major to direct the largest proportion of its expenditure towards its Scarborough project. Infield Systems also expects Shell to increase its share of market Capex compared to the historic period. Shell will continue to develop its Prelude FLNG project over the course of the next five years, which will require the largest proportion of the operator’s expenditure.

During the previous five years, the pipeline market formed the largest share of Capex. Although this share is expected to decrease going forwards to 2017, a significant proportion of regional spend is forecast to remain within this market sector. Key field developments expected to demand significant pipeline Capex during the next five years include: Ichthys, Wheatstone and the Woodside-operated Calliance.

As a result of the high proportion of new build floating platform units forecast for the forthcoming period, this market sector is expected to account for the largest proportion of spend. Inpex’s Ichthys LNG project will be one of the key focuses of investment, with the field expected to require two floating platforms.

The subsea completions market is likely to see a huge increase in investment in the 1,000-1,499m water depth category, largely as a result of the Greater Gorgon Area and Equus field developments. With growing demand for gas to feed into Australia’s LNG industry, operators are likely to search for new resources in deeper waters, increasing the usage of FPS and subsea infrastructure. With increasing levels of subsea completion Capex, the control line market is also likely to see increased levels of activity, with Infield Systems forecasting a 117% increase in expenditure.
Why You Should Buy This Report

- **Executive Summary** provides an overview of the Australasian 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 unconventional 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, Suction Pile, 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 (TLP, Semi-Submersible, FSO, FPSO, Other Floaters), by water depth and by build. Key developments are also discussed.
  - **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.

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.
- The reader is given a comprehensive presentation of the offshore market in the Australasian region with commentary and detailed analysis covering the macro economic climate right through to analysis by country and operator in terms of both Capex and number of units forecast to be installed.
- Detailed sector analysis appraising the variances in regional and country drivers for the Australasian offshore oil and gas market, providing insight into the trends expected within the market over the next five years.

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- Subsea
- Pipelines & Control Lines
- Fixed Platforms
- Floating Production Systems
- Offshore LNG
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CONTENTS LIST

1. EXECUTIVE SUMMARY .................................................................................................................. 31

2. MACRO MARKET OVERVIEW ........................................................................................................ 39
   2.1 Introduction .............................................................................................................................. 39
   2.2 Global Economic Update .......................................................................................................... 40
       2.2.1 Developed Economies ...................................................................................................... 40
           2.2.1.1 Eurozone .................................................................................................................... 40
           2.2.1.2 United States ............................................................................................................. 40
           2.2.1.3 Japan ......................................................................................................................... 40
       2.2.2 Emerging Markets ............................................................................................................. 41
           2.2.2.1 China ........................................................................................................................ 41
           2.2.2.2 India ........................................................................................................................ 41
           2.2.2.3 Brazil ........................................................................................................................ 41
   2.3 Oil Markets .................................................................................................................................. 42
       2.3.1 Short Term Price Dynamics .............................................................................................. 42
       2.3.2 Long Term Price Dynamics .............................................................................................. 44
       2.3.3 Base Case Scenario .......................................................................................................... 44
           2.3.3.1 Oil Glut Scenario ........................................................................................................ 45
           2.3.3.2 Commodity Super-Cycle Scenario .......................................................................... 45
   2.4 Gas Markets ................................................................................................................................ 46
       2.4.1 A New Demand Trajectory .............................................................................................. 46
       2.4.2 The Retreat of Nuclear Power .......................................................................................... 47
       2.4.3 The Rise of Shale Gas ....................................................................................................... 48
       2.4.4 The Internationalisation of Gas Markets ......................................................................... 49
   2.5 Field Sanction Points .................................................................................................................. 50
   2.6 Production Cost Curve .............................................................................................................. 51
   2.7 Oil Companies & Contractors ................................................................................................. 52
       2.7.1 Oil Companies ................................................................................................................... 52
       2.7.2 Oilfield Services ................................................................................................................ 53
       2.7.3 Drilling ............................................................................................................................... 54
       2.7.4 Fabrication Yards .............................................................................................................. 55
   2.8 Offshore Production & Reserves ............................................................................................... 56
       2.8.1 Undeveloped Oil & Gas Reserves .................................................................................... 57
       2.8.2 Undeveloped Oil Reserves .............................................................................................. 58
       2.8.3 Undeveloped Gas Reserves ............................................................................................. 59

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6. AUSTRALASIAN PIPELINES & CONTROL LINES ................................................................. 149
   6.1 Market Overview ........................................................................................................ 149
   6.2 Operators .................................................................................................................... 150
   6.3 Key Developments ...................................................................................................... 154
   6.4 Pipelines by Country ................................................................................................. 156
   6.5 Pipelines by Type ........................................................................................................ 159
   6.6 Pipelines by Water Depth ............................................................................................ 162
   6.7 Pipelines by Material .................................................................................................. 165
   6.8 Pipelines by Diameter ................................................................................................ 168
   6.9 Control Lines by Country ........................................................................................... 172
   6.10 Control Lines by Type ............................................................................................... 175

7. AUSTRALASIAN DEEP & ULTRA-DEEPWATER .......................................................... 181
   7.1 Market Overview ........................................................................................................ 181
   7.2 Operators .................................................................................................................... 182
   7.3 Key Developments ...................................................................................................... 185
   7.4 Deepwater Development by Country ...................................................................... 186
   7.5 Deepwater Platforms ................................................................................................. 187
   7.6 Deepwater Subsea ...................................................................................................... 190
   7.7 Deepwater Pipelines .................................................................................................. 193
   7.8 Deepwater Control Lines ......................................................................................... 196

8. AUSTRALASIAN SPECIALIST VESSELS ...................................................................... 205
   8.1 Market Overview ........................................................................................................ 205
   8.2 Pipelay Market ........................................................................................................... 206
      8.2.1 Regional Demand (Vessel Days) ........................................................................ 206
      8.2.2 Regional Supply (Units) and Contract Awards ..................................................... 210
   8.3 Heavy Lift Market ...................................................................................................... 212
      8.3.1 Regional Demand (Vessel Days) ........................................................................ 212
      8.3.2 Regional Vessel Supply (Units) and Contract Awards ............................................. 216
   8.4 Multifunctional Market .............................................................................................. 217
      8.4.1 Regional Demand (Vessel Days) ........................................................................ 217
      8.4.2 Regional Vessel Supply (Units) and Contract Awards ............................................. 225
   8.5 Accommodation Market ........................................................................................... 227
      8.5.1 Regional Demand (Vessel Days) ........................................................................ 227
      8.5.2 Regional Vessel Supply (Units) and Contract Awards ............................................. 230
Regional Perspectives

9. APPENDICES & NOTES .................................................. 233
  9.1 Defined Regions/Countries .................................................. 233
  9.2 Glossary, Acronyms & Abbreviations .................................. 234
    9.2.1 Glossary ......................................................................... 234
    9.2.2 Product/Service Definitions .............................................. 235
    9.2.3 Abbreviations & Standards of Measurement .................... 236
    9.2.4 Organisations and Names .................................................. 239
LIST OF FIGURES

Figure 1 - 1: Australasia Capex (US$m) by Country 2008-2017 .......................................................... 31
Figure 1 - 2: Australasia Capex (%) by Country 2008-2012 .............................................................. 32
Figure 1 - 3: Australasia Capex (%) by Country 2013-2017 .............................................................. 32
Figure 1 - 4: Australasia Capex (US$m) by Operator 2008-2017 ...................................................... 33
Figure 1 - 5: Australasia Capex (%) by Operator 2008-2012 ............................................................ 34
Figure 1 - 6: Australasia Capex (%) by Operator 2013-2017 ............................................................ 34
Figure 1 - 7: Australasia Capex (US$m) by Sector 2008-2017 ......................................................... 35
Figure 1 - 8: Australasia Capex (%) by Sector 2008-2012 ............................................................. 35
Figure 1 - 9: Australasia Capex (%) by Sector 2013-2017 ............................................................... 35
Figure 2 - 1: Brent Price (Annual Average). .................................................................................. 42
Figure 2 - 2: Brent Trading Range .................................................................................................. 42
Figure 2 - 3: Fiscal Breakeven Oil Prices - OPEC Countries ...................................................... 43
Figure 2 - 4: Long Term Price Scenarios ....................................................................................... 44
Figure 2 - 5: Global Oil Supply & Demand Balance in 2020 ....................................................... 45
Figure 2 - 6: Global Gas Demand Forecast .................................................................................. 46
Figure 2 - 7: OECD vs. Non-OECD Gas Demand Forecast ...................................................... 46
Figure 2 - 8: Global Energy Demand Forecast (2013-2018) ....................................................... 47
Figure 2 - 9: Gas Price Forecast ................................................................................................... 48
Figure 2 - 10: LNG Share of Global Gas Supply .......................................................................... 49
Figure 2 - 11: Field Sanction Points By Water Depth (m) ............................................................. 50
Figure 2 - 12: Average Field Sanction Points By Water Depth (m) .............................................. 50
Figure 2 - 13: Production Cost Curves ......................................................................................... 51
Figure 2 - 14: Offshore Backlogs: OFS Majors ......................................................................... 53
Figure 2 - 15: Offshore Operating Margin: OFS Majors ............................................................... 53
Figure 2 - 16: Global Rig Fleet By Operational Status ................................................................. 54
Figure 2 - 17: Rigs Under Contract ............................................................................................... 54
Figure 2 - 18: Oil Production Trends – Onshore vs. Offshore .................................................... 56
Figure 2 - 19: Future Oil Production Requirement .................................................................. 56
Figure 2 - 20: Undeveloped 2P Oil & Gas Reserves Growth (%) 2009-2012 ............................. 57
Figure 2 - 21: Undeveloped 2P Oil Reserves By Region .............................................................. 58
Figure 2 - 22: Undeveloped 2P Gas Reserves By Region ............................................................ 59
Figure 2 - 23: Oil Prices & Deepwater Developments ................................................................. 60
Figure 2 - 24: Undeveloped Deepwater Reserves By Country .................................................... 61
Figure 2 - 25: Oilfields by On-Stream Year, Reserves Size and Water Depth .............................. 61
Figure 2 - 26: Gasfields by On-Stream Year, Reserves Size and Water Depth ........................... 61
Figure 2 - 27: Maximum & Average Tieback Distance .............................................................. 62
Figure 2 - 28: Discovered Offshore Arctic Fields ....................................................................... 62
Figure 2 - 29: Discovered Offshore Arctic Resources ................................................................. 63
Figure 2 - 30: Small Field Developments ................................................................. 64
Figure 2 - 31: UKCS Project Approvals with Tax Breaks ................................. 64
Figure 2 - 32: Fields On-Stream By Development Type ................................. 65
Figure 2 - 33: Global LNG Consumption By Region ........................................ 67
Figure 2 - 34: Shallow Water Platform Installations & Shallow Water E&A Wells in the US Gulf of Mexico ................................................................. 68
Figure 2 - 35: Deepwater Drilling Permit Approval & Deepwater Well Spuds ................................................................. 70
Figure 3 - 1: Australasia Fixed Platform Capex (US$m) by Operator 2008-2017 .... 74
Figure 3 - 2: Australasia Fixed Platform Capex (%) by Operator 2008-2012 ...... 74
Figure 3 - 3: Australasia Fixed Platform Capex (%) by Operator 2013-2017 ...... 74
Figure 3 - 4: Australasia Fixed Platform Installations (No.s) by Operator 2008-2017 .... 75
Figure 3 - 5: Australasia Fixed Platform Installations (%) by Operator 2008-2012 ... 76
Figure 3 - 6: Australasia Fixed Platform Installations (%) by Operator 2013-2017 ... 76
Figure 3 - 7: Australasia Fixed Platform Capex (US$m) by Country 2008-2017 .... 79
Figure 3 - 8: Australasia Fixed Platform Capex (%) by Country 2008-2012 ...... 79
Figure 3 - 9: Australasia Fixed Platform Capex (%) by Country 2013-2017 ...... 79
Figure 3 - 10: Australasia Fixed Platform Installations (No.s) by Country 2008-2017 .... 80
Figure 3 - 11: Australasia Fixed Platform Installations (%) by Country 2008-2012 ... 81
Figure 3 - 12: Australasia Fixed Platform Installations (%) by Country 2013-2017 ... 81
Figure 3 - 13: Australasia Fixed Platform Capex (US$m) by Type 2008-2017 ........ 83
Figure 3 - 14: Australasia Fixed Platform Capex (%) by Type 2008-2012 .......... 83
Figure 3 - 15: Australasia Fixed Platform Capex (%) by Type 2013-2017 .......... 83
Figure 3 - 16: Australasia Fixed Platform Installations (No.s) by Type 2008-2017 ... 84
Figure 3 - 17: Australasia Fixed Platform Installations (%) by Type 2008-2012 .... 85
Figure 3 - 18: Australasia Fixed Platform Installations (%) by Type 2013-2017 .... 85
Figure 3 - 19: Australasia Fixed Platform Capex (US$m) by Water Depth (m) 2008-2017 ... 87
Figure 3 - 20: Australasia Fixed Platform Capex (%) by Water Depth (m) 2008-2012 ... 87
Figure 3 - 21: Australasia Fixed Platform Capex (%) by Water Depth (m) 2013-2017 ... 87
Figure 3 - 22: Australasia Fixed Platform Installations (No.s) by Water Depth (m) 2008-2017 ... 88
Figure 3 - 23: Australasia Fixed Platform Installations (%) by Water Depth (m) 2008-2012 ... 89
Figure 3 - 24: Australasia Fixed Platform Installations (%) by Water Depth (m) 2013-2017 ... 89
Figure 3 - 25: Australasia Fixed Platform Capex (US$m) by Weight Band (Metric Tonnes) 2008-2017 ... 91
Figure 3 - 26: Australasia Fixed Platform Capex (%) by Weight Band (Metric Tonnes) 2008-2012 ... 91
Figure 3 - 27: Australasia Fixed Platform Capex (%) by Weight Band (Metric Tonnes) 2013-2017 ... 91
Figure 3 - 28: Australasia Fixed Platform Installations (No.s) by Weight Band (Metric Tonnes) 2008-2017 ... 92
Figure 3 - 29: Australasia Fixed Platform Installations (%) by Weight Band (Metric Tonnes) 2008-2012 ... 93
Figure 3 - 30: Australasia Fixed Platform Installations (%) by Weight Band (Metric Tonnes) 2013-2017 ... 93
Figure 3 - 31: Future Australasia Fixed Platform Developments 2013-2017 ........... 95
Figure 4 - 1: Australasia FPS Capex (US$m) by Operator 2008-2017 .......... 100
Figure 4 - 2: Australasia FPS Capex (%) by Operator 2008-2012 ........ 100
Offshore Australasia Oil and Gas Market Report to 2017

Regional Perspectives

Figure 5 - 10: Australasia Total Subsea Capex (%) by Country 2008-2012................................................................. 133
Figure 5 - 11: Australasia Total Subsea Capex (%) by Country 2013-2017 ................................................................. 133
Figure 5 - 12: Australasia Total Subsea Tree Installations by Country 2008-2017 .......................................................... 133
Figure 5 - 13: Australasia Total Subsea Tree Installations (%) by Country 2008-2012 .................................................... 134
Figure 5 - 14: Australasia Total Subsea Tree Installations (%) by Country 2013-2017 ..................................................... 134
Figure 5 - 15: Australasia Subsea Capex (US$m) by Sector 2008-2017 ............................................................... 135
Figure 5 - 16: Australasia Subsea Capex (%) by Sector 2008-2012 ................................................................. 135
Figure 5 - 17: Australasia Subsea Capex (%) by Sector 2013-2017 ................................................................. 135
Figure 5 - 18: Australasia Subsea Tree Installations by Development Type 2008-2017 ................................................ 136
Figure 5 - 19: Australasia Subsea Tree Installations (%) by Development Type 2008-2012 ........................................ 137
Figure 5 - 20: Australasia Subsea Tree Installations (%) by Development Type 2013-2017 ........................................ 137
Figure 5 - 21: Australasia Subsea Equipment Capex (US$m) by Type 2008-2017 ......................................................... 138
Figure 5 - 22: Australasia Subsea Equipment Capex (%) by Type 2008-2012 ............................................................ 138
Figure 5 - 23: Australasia Subsea Equipment Capex (%) by Type 2013-2017 ............................................................ 138
Figure 5 - 24: Australasia Subsea Equipment Installations by Type 2008-2017 ......................................................... 139
Figure 5 - 25: Australasia Subsea Equipment Installations (%) by Type 2008-2012 ...................................................... 140
Figure 5 - 26: Australasia Subsea Equipment Installations (%) by Type 2013-2017 ...................................................... 140
Figure 5 - 27: Australasia Subsea Capex (US$m) by Water Depth (m) 2008-2017 ........................................................ 141
Figure 5 - 28: Australasia Subsea Capex (%) by Water Depth (m) 2008-2012 ............................................................ 141
Figure 5 - 29: Australasia Subsea Capex (%) by Water Depth (m) 2013-2017 ............................................................ 141
Figure 5 - 30: Australasia Subsea Tree Installations by Water Depth (m) 2008-2017 ................................................... 142
Figure 5 - 31: Australasia Subsea Tree Installations (%) by Water Depth (m) 2008-2012 ............................................. 143
Figure 5 - 32: Australasia Subsea Tree Installations (%) by Water Depth (m) 2013-2017 ............................................. 143
Figure 5 - 33: Existing Australasia Oil and Gas Fields ................................................................................................. 144
Figure 5 - 34: Future Australasia Oil and Gas Fields ................................................................................................. 145
Figure 6 - 1: Australasia Pipeline Capex (US$m) by Operator 2008-2017 ................................................................. 150
Figure 6 - 2: Australasia Pipeline Capex (%) by Operator 2008-2012 ................................................................. 151
Figure 6 - 3: Australasia Pipeline Capex (%) by Operator 2013-2017 ................................................................. 151
Figure 6 - 4: Australasia Pipeline Installations (km) by Operator 2008-2017 ............................................................... 152
Figure 6 - 5: Australasia Pipeline Installations (%) by Operator 2008-2012 ............................................................... 152
Figure 6 - 6: Australasia Pipeline Installations (%) by Operator 2013-2017 ............................................................... 152
Figure 6 - 7: Australasia Pipeline Capex (US$m) by Country 2008-2017 ................................................................. 156
Figure 6 - 8: Australasia Pipeline Capex (%) by Country 2008-2012 ................................................................. 157
Figure 6 - 9: Australasia Pipeline Capex (%) by Country 2013-2017 ................................................................. 157
Figure 6 - 10: Australasia Pipeline Installations (km) by Country 2008-2017 ............................................................ 157
Figure 6 - 11: Australasia Pipeline Installations (%) by Country 2008-2012 ............................................................ 158
Figure 6 - 12: Australasia Pipeline Installations (%) by Country 2013-2017 ............................................................ 158
Figure 6 - 13: Australasia Pipeline Capex (US$m) by Type 2008-2017 ................................................................. 159
Figure 6 - 14: Australasia Pipeline Capex (%) by Type 2008-2012 ................................................................. 160
Figure 8 - 19: Australasian IRM Demand (%) by Country 2013-2017 ................................................................. 218
Figure 8 - 20: Australasian Construction Support Demand (Vessel Days) by Country 2008-2017 .............................. 219
Figure 8 - 21: Australasian Construction Support Demand (%) by Country 2008-2012 ........................................ 220
Figure 8 - 22: Australasian Construction Support Demand (%) by Country 2013-2017 ........................................ 220
Figure 8 - 23: Australasian Combined Multifunctional Demand (Vessel Days) by Country 2008-2017 ...................... 221
Figure 8 - 24: Australasian Combined Multifunctional Demand (%) by Country 2008-2012 .................................... 222
Figure 8 - 25: Australasian Combined Multifunctional Demand (%) by Country 2013-2017 ................................. 222
Figure 8 - 26: Australasian Combined Multifunctional Demand (Vessel Days) by Water Depth 2008-2017 ............. 223
Figure 8 - 27: Australasian Combined Multifunctional Demand (%) by Water Depth 2008-2012 ......................... 223
Figure 8 - 28: Australasian Combined Multifunctional Demand (%) by Water Depth 2013-2017 ......................... 223
Figure 8 - 29: Cumulative Australasian Multifunctional Vessel Supply (Units) by Operator 2008-2017 .................. 225
Figure 8 - 30: Australasian Multifunctional Vessel Contracts (%) by Vessel Operator 2008-2017 ......................... 226
Figure 8 - 31: Australasian Multifunctional Vessel Contracts (%) by Country 2008-2017 ................................. 226
Figure 8 - 32: Australasian Accommodation Demand (Vessel Days) by Country 2008-2017 ............................ 227
Figure 8 - 33: Australasian Accommodation Demand (%) by Country 2008-2012 ............................................. 228
Figure 8 - 34: Australasian Accommodation Demand (%) by Country 2013-2017 ............................................. 228
Figure 8 - 35: Australasian Accommodation Demand (Vessel Days) by Water Depth 2008-2017 ...................... 228
Figure 8 - 36: Australasian Accommodation Demand (%) by Water Depth 2008-2012 ..................................... 229
Figure 8 - 37: Australasian Accommodation Demand (%) by Water Depth 2013-2017 ................................. 229
Figure 8 - 38: Cumulative Australasian Accommodation Vessel Supply (Units) by Operator 2008-2017 ............. 230
LIST OF TABLES

Table 1 - 1: Australasia Capex (US$m) by Country 2008-2012 ................................................................. 32
Table 1 - 2: Australasia Capex (US$m) by Country 2013-2017 ................................................................. 32
Table 1 - 3: Australasia Capex (US$m) by Operator 2008-2012 .............................................................. 34
Table 1 - 4: Australasia Capex (US$m) by Operator 2013-2017 .............................................................. 34
Table 1 - 5: Australasia Capex (US$m) by Sector 2008-2012 ................................................................. 36
Table 1 - 6: Australasia Capex (US$m) by Sector 2013-2017 ................................................................. 36
Table 2 - 1: Global Economic Indicators ......................................................................................... 41
Table 3 - 1: Australasia Fixed Platform Capex (US$m) by Operator 2008-2012 ...................... 75
Table 3 - 2: Australasia Fixed Platform Capex (US$m) by Operator 2013-2017 ...................... 75
Table 3 - 3: Australasia Fixed Platform Installations (No.s) by Operator 2008-2012 .............. 76
Table 3 - 4: Australasia Fixed Platform Installations (No.s) by Operator 2013-2017 .............. 76
Table 3 - 5: Australasia Fixed Platform Capex (US$m) by Country 2008-2012 ..................... 80
Table 3 - 6: Australasia Fixed Platform Capex (US$m) by Country 2013-2017 ..................... 80
Table 3 - 7: Australasia Fixed Platform Installations (No.s) by Country 2008-2012 .............. 81
Table 3 - 8: Australasia Fixed Platform Installations (No.s) by Country 2013-2017 .............. 81
Table 3 - 9: Australasia Fixed Platform Capex (US$m) by Type 2008-2012 ............................ 84
Table 3 - 10: Australasia Fixed Platform Capex (US$m) by Type 2013-2017 .......................... 84
Table 3 - 11: Australasia Fixed Platform Installations (No.s) by Type 2008-2012 ................ 85
Table 3 - 12: Australasia Fixed Platform Installations (No.s) by Type 2013-2017 ................ 85
Table 3 - 13: Australasia Fixed Platform Capex (US$m) by Water Depth (m) 2008-2012 ...... 88
Table 3 - 14: Australasia Fixed Platform Capex (US$m) by Water Depth (m) 2013-2017 ...... 88
Table 3 - 15: Australasia Fixed Platform Installations (No.s) by Water Depth (m) 2008-2012 ... 89
Table 3 - 16: Australasia Fixed Platform Installations (No.s) by Water Depth (m) 2013-2017 ... 89
Table 3 - 17: Australasia Fixed Platform Capex (US$m) by Weight Band (Metric Tonnes) 2008-2012 ... 92
Table 3 - 18: Australasia Fixed Platform Capex (US$m) by Weight Band (Metric Tonnes) 2013-2017 ... 92
Table 3 - 19: Australasia Fixed Platform Installations (No.s) by Weight Band (Metric Tonnes) 2008-2012 ... 93
Table 3 - 20: Australasia Fixed Platform Installations (No.s) by Weight Band (Metric Tonnes) 2013-2017 ... 93
Table 4 - 1: Australasia FPS Capex (US$m) by Operator 2008-2012 ................................................. 101
Table 4 - 2: Australasia FPS Capex (US$m) by Operator 2013-2017 ................................................. 101
Table 4 - 3: Australasia FPS Installations (Nos.) by Operator 2008-2012 ...................................... 103
Table 4 - 4: Australasia FPS Installations (Nos.) by Operator 2013-2017 ...................................... 103
Table 4 - 5: Australasia FPS Capex (US$m) by Country 2008-2012 .................................................... 106
Table 4 - 6: Australasia FPS Capex (US$m) by Country 2013-2017 .................................................... 106
Table 4 - 7: Australasia FPS Installations (Nos.) by Country 2008-2012 ............................................ 108
Table 4 - 8: Australasia FPS Installations (Nos.) by Country 2013-2017 ............................................ 108
Table 4 - 9: Australasia FPS Capex (US$m) by Type 2008-2012 ......................................................... 110
Table 4 - 10: Australasia FPS Capex (US$m) by Type 2013-2017 ...................................................... 110
Table 4 - 11: Australasia FPS Installations (Nos.) by Type 2008-2012 .............................................. 112

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

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