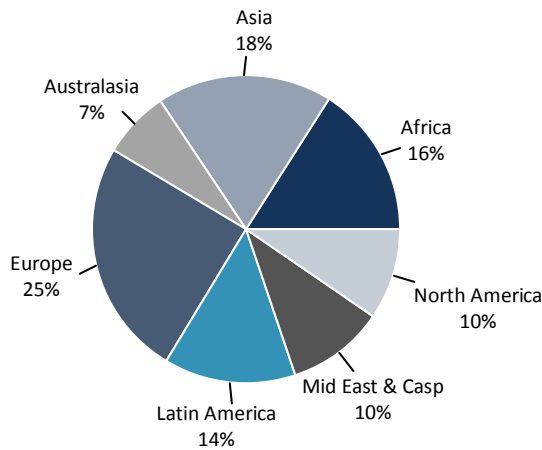


Infield Systems has recently published the latest edition of the **Global Perspectives Offshore Pipelines & Control Lines Market Report**. This highly respected report provides a comprehensive analysis of this key industry sector up to 2017 and focuses on the core market segments of SURF, Conventional Pipelines and Trunk/Export Lines. The **Offshore Pipelines and Control Lines Market Report to 2017** provides both a global and a region by region forecast (2008-2017) in terms of capital expenditure and kilometres installed. Pipelines are analysed by operator, country, market segment, water depth, material and diameter, whilst control lines are analysed by country and type. A market overview is also included along with a breakdown of the most capital intensive pipeline and control line projects for each region.

Total global pipeline and control line Capex is expected to increase by 59.8% over the next five years compared to the period 2008-2012. Growth is expected throughout the forecast period and is predicted to peak in 2015.



Global Pipeline Capex (%) by Region 2013-2017

Source: Infield Systems' Pipelines & Control Lines Market Report to 2017

Europe is set to account for the largest share of total Pipeline Capex (25%) and Infield Systems expects two distinct trends to emerge in the region during the forecast period. Firstly, growth in trunk/export line demand is expected from a series of long distance export pipelines in Eastern Europe (South Stream and North Stream expansion). Whilst compelling in the short term, the vast lengths of pipe associated with these projects tends to mask perhaps a more pertinent long term shift in the region towards SURF infrastructure. Through the development of remote fields both the UK and Norway are set to characterise the majority of this demand.

Activity in Asia is driven by both shallow and deepwater environments, and consequently demand is polarized and split between both SURF and conventional activity. Infield Systems expects this dynamic to continue, with shallow water, conventional activity expected to account for the bulk of demand (from the likes of Thailand, Malaysia and Indonesia). Deepwater activity in the region is set to continue to evolve however, and Infield Systems expects the development of floating platforms and related subsea infrastructure to further drive this segment of the market.

The traditional markets of West and North Africa are the primary drivers of African demand and are characterised by conventional pipeline systems in shallow waters. Following Angolan deepwater investment in particular, SURF activity has increased in the region. Infield Systems expects this trend towards deepwater deployment of SURF in West Africa to continue, and for it to present significant opportunities for the supply chain during the forecast period. Although this expected demand is set to be driven predominantly by

the likes of Angola and Ghana in the short to medium term, the key theme is the re-emergence of activity in Nigerian waters.

The Latin American market is polarised between the conventional Mexican market and the extensive Brazilian sector. Each country is dominated by the presence of an NOC; in the case of Mexico, Pemex is seeking to increase production from the Bay of Campeche; whilst in Brazil, Petrobras seeks to develop its series of discoveries within the pre salt Santos and Campos basins. Opportunities are diverse across SURF, conventional and trunk line infrastructure and as such, the development of the region will be key to overall industry appetite.

A key driver of historical development in the Middle East and Caspian has been strong growth in gas demand from the Persian Gulf and the wider Middle East. Gas projects in Qatar, Iran, Israel, Saudi Arabia and Egypt represent the majority of demand and are set to drive pipeline Capex in the region. Key projects include the Shah Deniz (Phase 2) project in Azerbaijan, the Kashagan project in Kazakhstan and the Leviathan project in Israel. Although these large projects involve levels of conventional, SURF and trunk line activity, the region as a whole is characterised by conventional pipeline associated with shallow water fixed infrastructure.

North America is the most mature region for offshore exploration and production; however, in recent years it has experienced a great deal of volatility. The existing mature asset base, consisting of conventional infrastructure on shallow water developments, has been deeply affected by the rise in prominence of onshore shale gas production. However, Infield Systems expects opportunities to remain in the region, in particular from the expected increase in deepwater work, the majority of which is expected to emanate from fields that are being developed using tie-backs, rather than with the trunk/export line infrastructure that characterises other regions.

The large West Australian gas fields, such as Wheatstone, Ichthys and Gorgon define the majority of Australasian pipeline and control line demand. The current market is primarily shallow water based; however, the implementation of secondary and tertiary stage developments is set to see the deepwater segment of the market grow. However, doubts still remain over the timings of these projects as cost overruns and potential shifts in projects are a concern.

About This Report

Number of Pages:	384
Number of Figures:	476
Number of Tables:	289

Report Contents

- **Executive Summary** provides an overview of the Pipeline and Control Line market highlighting the main points of the report and identifying the most important countries, operators and market characteristics within each region.
- **Macro 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.
- **Global Overview** provides an in-depth analysis of the global Pipelines and Control Lines market. Infield Systems presents a forecast (2008-2017) in terms of capital expenditure and kilometres installed. The two distinct markets (pipelines and control lines) are analysed by region, market segment and operator and then a more detailed breakdown is provided once each is broken down into

its constituent parts (SURF, Conventional, Trunk/Export, Flexible, Rigid, Control Lines and Umbilical Lines).

- **Regional Overview** contains detailed analysis for each of the following regions: Africa, Asia, Australasia, Europe, Latin America, the Middle East and Caspian and North America. For each section, Infield Systems presents a forecast (2008-2017) in terms of capital expenditure and kilometres installed. Pipelines are analysed by operator, country, market segment, water depth, material and diameter, whilst control lines are analysed by country and type. A market overview is also included along with a breakdown of the most capital intensive pipeline and control line projects for each region.

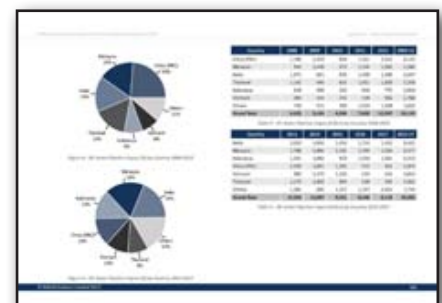
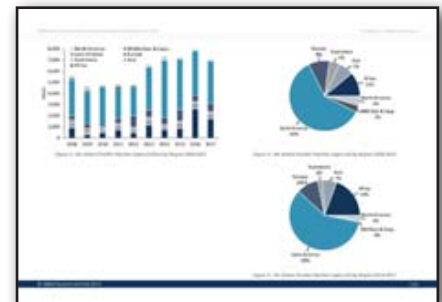
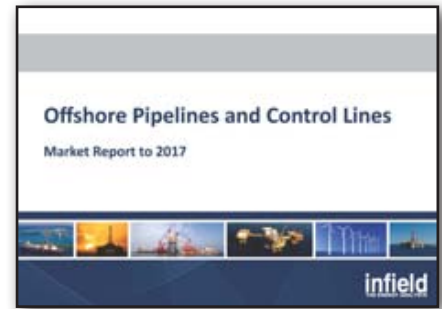
Why You Should Buy This Report

- The report contains data developed by Infield Systems' market modeling 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 report provides a comprehensive analysis of the pipelines and control lines market on a country-by-country basis, in terms of both forecast Capex as well as the total length - in kilometres - expected to be installed.
- The report provides a detailed sector analysis, sub-dividing the control line and pipeline markets in terms of: market segment, water depth and diameter groups, which provides a clear insight into the precise drivers of market demand across the globe as well as the types of installations contractors may expect to see during the forecast period.
- The report provides information on the most prominent operators in the market as well as a breakdown of the most capital intensive pipeline and control line projects for each region.

Global & Regional Perspectives Market Reports

Infield Systems publishes a range of market reports covering various aspects and regions of the oil, gas, renewable energy and associated marine industries. Utilising comprehensive in-house project databases, industry models and research capacity these reports are widely used by industry analysts and professionals:

- Deep & Ultra-deepwater
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- Pipelines & Control Lines
- Fixed Platforms
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- Specialist Vessels & Accommodation
- Subsea Well Intervention
- Remotely Operated Vehicles
- Africa
- Arctic
- Asia
- Europe
- Australasia
- Latin America
- Middle East & Caspian
- North America



EXECUTIVE SUMMARY

MACRO MARKET OVERVIEW

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 - Brazil
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- Australasia (same as Africa)
- Europe (same as Africa)
- Latin America (same as Africa)
- Middle East & Caspian (same as Africa)
- North America (same as Africa)

APPENDICES & NOTES

- Defined Regions/Countries
- Glossary, Acronyms & Abbreviations
 - Glossary
 - Product/Service Definitions
 - Abbreviations & Standards of Measurement

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- Pipeline Route
- Project Status
- Pipeline Diameter (inches)
- Pipeline Length (metres)
- Buried, Surface or Trenched
- Product
- Date/Year Pipeline Laid
- Pipeline Maximum Water Depth (metres)
- Pipeline Type (Steel, Flexible, Stainless Steel)
- Pipeline Tube Type (Steel, Flexible, Stainless Steel)
- Pipeline Weight Coat
- Pipeline Lay Vessel Type

For each Control & Umbilical Line project the following information is provided:

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- Country
- Operator Name, Address and Contact Details
- Control Line Route
- Project Status
- Control Line Length (metres)
- Buried, Surface or Trench Lay
- Date/Year Control Line Laid
- Control Line Maximum Water Depth (metres)
- Control Line Type
- Control Line Line Type

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