

The Offshore Pipelines and Control Lines Market Report to 2019 provides a comprehensive analysis of this key industry sector, focusing on the core market segments of SURF, Conventional Pipelines and Trunk/Export Lines. This report provides a global and a region by region forecast (2010-2019) 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, by operator and by type.



MARKET WATCH

Despite the uncertainties in global oil prices, Infield Systems expects to see a healthy growth in investment within the pipelines and control lines sectors over the 2015-2019 timeframe. Rebounding from a drop in expenditure during 2015, this market is expected to grow by a CAGR of 6% throughout the period, with a total of 51,797 kilometres of pipelines and 30,432 kilometres of control lines forecast to be installed globally during the timeframe. Whilst the largest investment within the pipelines sector is expected to be seen offshore Latin America, Europe is expected to account for the largest share of control line expenditure demand during the five year period to 2019.

Latin America is anticipated to see the highest levels of pipeline investment during the period of analysis. The region is projected to see a 35% increase in offshore pipeline Capex in comparison to the historic period which mainly relates to developments offshore Brazil, where SURF lines are the predominant pipeline type installed due to the deep and ultra deepwater nature of prospects. Control line Capex in Latin America is expected to increase by 70% in comparison to the historic period.

Although Europe is expected to drop to fourth place in terms of pipeline Capex, the region is still expected to see a 27% increase in expenditure. North West Europe will be the main source of demand and could account for 75% of European pipeline expenditure up to 2019. Installation activity will be largely focused on the region's two main offshore markets, Norway and the UK. Europe is expected to remain the primary driver of control line demand, with investment levels expected to rise significantly.

Africa could see the largest relative increase in pipeline Capex in comparison to the historic period, with West Africa continuing to be the mainstay of pipeline demand.

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.
- **Global Overview** provides an in-depth analysis of the global Pipelines and Control Lines market. Infield Systems presents a forecast (2010-2019) in terms of capital expenditure and kilometres installed. The two distinct markets (pipelines and control lines) are analysed by region 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 (2010-2019) in terms of capital expenditure and kilometres installed. Pipelines are analysed by country, operator, market segment, water depth, material and diameter, whilst control lines are analysed by country, operator and type. A market overview is also included which discusses the most capital intensive pipeline and control line projects for each region.

THIS REPORT

Number of Pages	348
Number of Figures	482
Number of Tables	316

WHY YOU SHOULD BUY THIS REPORT

- The report contains data developed by Infield Systems' proprietary 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 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 about the most capital intensive pipeline and control line projects for each region.

South East Asia has the potential to account for 67% of Asia's pipeline Capex over the next five years. Asia will continue to dominate pipeline installations between 2015 and 2019, with over 13,000 kilometres expected to be installed.

ONLINE DATABASE UPGRADES

Purchasers of the Global Perspectives Offshore Pipelines & Control Lines Market Report to 2019 receive 12 months access to a database of major offshore pipeline, control line and umbilical projects in the current year and four years forward, worldwide. The projects included in Pipelines Online are as follows: Trunklines of 50 km in length and over; Flowlines of 12.5km in length and over, with a diameter of 16"and greater; Umbilicals & Control Lines of 25km in length and over.

Pipelines Online is a subset of the Pipelines and Control Lines Data Sets from the Offshore Energy Database, which tracks over 62,000 pipelines and flowlines and 24,000 umbilicals, worldwide which range from one inch diameter, one metre length jumper flowlines through to the major intercontinental export lines. Upgrades to include other pipeline and control line projects are available upon request.

For each Pipeline project the following information is provided: Region, Country, Operator Name, 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: Region, 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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