The World Floating Production Market Forecast 2014-2018

Description: The NEW World Floating Production Market Report forecasts that between 2014 and 2018 $99 billion (bn) will be spent on floating production systems (FPS) – an increase of 138% over the preceding five-year period. The long-term growth in the sector is underpinned by the continued exploitation of deep waters, marginal fields and fast-track/short term deployments. Deepwater FPS deployments are expected to total $68bn in value and account for over two-thirds of the total spend.

FPSOs form the largest segment of the market (80%) both in terms of units installed and forecast capital expenditure (Capex) over the 2014-2018 period. Latin America accounts for 29% of the 139 installations forecast and 38% of the projected Capex.

The FPS sector recovery following the 2008/2009 downturn continues steadily. A total of 54 units were ordered in 2011-2013 compared to 23 units ordered during 2008-2009. There has been little growth in the annual value of installed units over the last four years; however, 2014 is expected to show a significant increase in the value of units deployed.

The industry is, however, still coming to terms with a number of demand-side and supply-side issues. The failure of Brazilian operator OGX in 2013 and the slow-down in overall upstream expenditure in 2014 will impact the market in the near-term. Likewise the industry's record in terms of project execution has been poor, with most projects delivered late and significantly over-budget. Some industry players are now suggesting a new approach is required.

Now in its 12th edition, this highly regarded and established report has been tracking and analysing the industry for over a decade. The market analysis, commentary and understanding are strengthened by extensive insight gained from strategy and consultancy work undertaken for major companies throughout the industry.

- Capex – from 2009 to 2018, segmented by components including hull, topside modules and mooring systems.

- FPS type – FPSOs, FPSSs, TLPs and Spars.

- Regional analysis – Africa, Asia, Australasia, Latin America, Middle East, North America and Western Europe.

- Operator analysis – Capex for the leading FPS operators historic, forecast and by region.

- Deepwater – by FPS type and region.

- Order year analysis – Capex by order year.

- The FPS Supply Chain – detailed analysis of the FPS supply chain, outlining the EPC firms, shipyards, lease contractors, topside fabricators and their respective capabilities.

- Leasing & Financing – the issues and future outlook for financing of the sector; analysis of major leasing contractors, their assets, profitability (EBIT margins) and a review of prospective vessel redeployments.

- List of prospective FPS units – includes information on all identified prospects coming onstream from 2014 to 2018 by operator, field, water depth, type, status, country and prospective year.

Why purchase the Floating Production Market Forecast?

- Unique and proprietary data – updated year-round from published sources and insight gained from industry consultation.

- Methodology – analysis is based on DW's in-house Oil & Gas database which details around 700 FPS projects. The data feeds into the market model to generate forecasts of floating production systems in each region of the world. Expenditure is allocated both to year of order and year of installation.
- Market forecasts – comprehensive examination, analysis and 10-year coverage of floating production capital expenditure.

- Concise report layout – consistent with DW's commitment to delivering value for our clients, all our market forecasts have a concise layout consisting of industry background and supporting materials condensed to enable quick review with ‘speed-read’ summaries of key points throughout.

- An essential report – for financial institutions, equipment manufacturers, offshore engineering, construction, operations & maintenance companies and contractors, oil & gas companies, lease contractors, shipbuilders and agencies & government departments wanting to make more informed investment decisions.

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