World Deepwater Market Forecast 2014-2018

Description:
Deepwater expenditure is expected to increase by 130%, compared to the preceding five-year period, totalling $260 billion (bn) from 2014 to 2018. As production from mature basins onshore and in shallow water declines, development of deepwater reserves has become increasingly vital. Robust oil prices support investment in deepwater developments - the sustained high oil prices over the past few years have increased confidence in the sector.

Africa and the Americas continue to dominate deepwater capital expenditure (Capex), with $213bn set to be spent over the next five years. Africa is forecast to experience the greatest growth among the three regions, as East African natural gas developments begin production and become more prominent in the latter years of the forecast period. Latin America will remain the largest market and North America is expected to experience the least growth.

This report has identified a temporary trough in global expenditure in 2015 primarily driven by delays to delivery of FPS units in Latin America. African projects have also experienced delays resulting in a surge in Capex from 2016 onwards.

The 12th edition of the Deepwater Market Forecast covers all key commercial themes relevant to players across the value chain in the deepwater sector:

- Supply chain - detailing the financing of deepwater developments, contractors, equipment and installations. Includes analysis of contracting strategies (e.g. frame agreements), dayrates, key players and capabilities of each sector within the deepwater market (drilling, FPS and subsea hardware).

- Key drivers - discussion of factors encouraging deepwater activity - including robust oil & gas prices, deepwater production to offset declining production from onshore and shallow water basins, E&P spend of international operators and Petrobras’ activity in Brazil.

- Regional forecasts - forecast Capex within each region, including examples of notable projects and operators within the region and countries with most activity.

- Component forecasts - drilling and completion (subsea and surface completed wells), subsea production hardware, SURF and trunklines.

The report also includes:

- Constraints - the impact of political and regulatory influences and geopolitical disputes on the deepwater market.

- Local content requirements - includes case studies of key countries.

- Focus areas - examination of deepwater provinces, including recent discoveries in East Africa.

- Procurement - factors affecting the decisions facing FPS operators, whether to lease or own vessels and details of major leasing contractors.

- List of deepwater prospects - includes information on all identified prospects coming onstream from 2014 to 2018 by operator, location, water depth, number of trees and status category.

Contents:
1 Summary and Conclusions
   - Summary
   - Conclusions

2 Drivers and Indicators
   - E&P Trends - Spending Activity
- Viability of Oil & Gas Developments
- Continued Development of Offshore Reserves
- Continued Development of Deepwater Reserves
- Oil Prices
- Gas Prices
- Importance of Brazil
- Current Influences in the Deepwater Market
- Deepwater Focus Areas

3 Field Development
- Field Lifecycle
- Drilling and Completion
- Field Development Concept Selection
- Subsea Production Hardware
- SURF and Trunklines
- Floating Production Systems (FPS)
- Vessels

4 The Supply Chain
- Financing
- Deepwater Supply Chain - Drilling and FPS
- Deepwater Supply Chain - Subsea Hardware
- Deepwater Drilling Fleet
- Rig Dayrate Analysis
- Subsea Tree Market Trends
- FPS Leasing
- Supply Issues - Local Content and Personnel

5 The Deepwater Market Forecast
- Introduction
- Forecasting and Potential Upside
- Assumptions
- Methodology
- The World Deepwater Market - By Region
- The World Deepwater Market - By Component
- Africa
- Asia
- Australasia
- Eastern Europe & FSU
- Latin America
- Middle East
- North America
- Western Europe
- Drilling and Completion: Subsea Completed Wells
- Drilling and Completion: Surface Completed Wells
- Subsea Production Hardware
- SURF
- Trunklines
- Floating Production Systems by Region
- Floating Production Systems by Type

6 Appendix
- Deepwater Prospects
- Data and Text Conventions

List of Figures and Tables:

Figure 1: Global Deepwater Capex by Region 2009-2018
Figure 2: Viability of Oil and Gas Development ($/bbl)
Figure 3: Oil & Gas Production vs E&P Spend
Figure 4: Global Oil Supply Mix - Onshore/Offshore Split 1965-2020
Figure 5: Global Oil Supply Mix - Onshore/Offshore Split 1965-2020
Figure 6: WTI Oil Price
Figure 7: Natural Gas Price
Figure 8: Brazilian Offshore Basins
Figure 9: Deepwater Focus Areas
Figure 10: Completion Offshore Strategy and Deepwater Field Development Concept Selection
Figure 11: Typical Lending Cycles in the Offshore Sector
Figure 12: Deepwater Supply Chain - Drilling and FPS
Figure 13: Deepwater Supply Chain - Subsea Hardware
Figure 14: Rig Managers of Existing Deepwater Rigs
Figure 15: Rig Managers of Deepwater Rigs Under Construction
Figure 16: Deepwater Rigs Currently On Order by Shipyard
Figure 17: Dayrates of Semi-submersibles, Drillship and Jackup Drilling Rigs
Figure 18: Average Dayrates of Deepwater Drilling Rigs
Figure 19: Visible Subsea Production Hardware Orders
Figure 20: Market Share of Subsea Production Hardware Suppliers
Figure 21: Leasing Contractors of Existing and Under Construction Deepwater Vessels
Figure 22: Tree Installed - Low, Medium and High case
Figure 23: Trees Installed by Category
Figure 24: Global - Deepwater Capex by Region
Figure 25: Global - Deepwater Capex by Component
Figure 26: Africa - Deepwater Capex by Component
Figure 27: Asia - Deepwater Capex by Component
Figure 28: Australasia - Deepwater Capex by Component
Figure 29: Eastern Europe & FSU - Deepwater Capex by Component
Figure 30: Latin America - Deepwater Capex by Component
Figure 31: Middle East - Deepwater Capex by Component
Figure 32: North America - Deepwater Capex by Component
Figure 33: Western Europe - Deepwater Capex by Component
Figure 34: Drilling and Completion: Subsea Wells - Deepwater Capex by Region
Figure 35: Subsea Drilling - Historic vs. Forecast Capex
Figure 36: Drilling and Completion: Surface Wells - Deepwater Capex by Region
Figure 37: Surface Drilling - Historic vs. Forecast Capex
Figure 38: Subsea Production Hardware - Deepwater Capex by Region
Figure 39: Subsea Production Hardware - Historic vs. Forecast Capex
Figure 40: SURF - Deepwater Capex by Region
Figure 41: SURF - Historic vs. Forecast Capex
Figure 42: Trunklines - Deepwater Capex by Region
Figure 43: Trunklines - Historic vs. Forecast Capex
Figure 44: Floating Production Systems - Deepwater Capex by Region
Figure 45: Floating Production Systems - Historic vs. Forecast Capex
Figure 46: Floating Production Systems - Deepwater Capex by Type
Figure 47: Floating Production Systems - Historic vs. Forecast Capex

Table 1: International E&P Expenditure ($million)
Table 2: International E&P Expenditure (Consolidated) ($million)
Table 3: Majors' Oil Production
Table 4: Global - Deepwater Capex by Region
Table 5: Global - Deepwater Capex by Component
Table 6: Africa - Deepwater Capex by Component
Table 7: Asia - Deepwater Capex by Component
Table 8: Australasia - Deepwater Capex by Component
Table 9: Eastern Europe & FSU - Deepwater Capex by Component
Table 10: Latin America - Deepwater Capex by Component
Table 11: Middle East - Deepwater Capex by Component
Table 12: North America - Deepwater Capex by Component
Table 13: Western Europe - Deepwater Capex by Component
Table 14: Drilling and Completion: Subsea Wells - Deepwater Capex by Region
Table 15: Drilling and Completion: Subsea Wells - Units by Component Type
Table 16: Drilling and Completion: Surface Wells - Deepwater Capex by Region
Table 17: Drilling and Completion: Surface Wells - Units by Component Type
Table 18: Subsea Production Hardware - Deepwater Capex by Region
Table 19: Subsea Production Hardware - Units by Component Type
Table 20: SURF - Deepwater Capex by Region
Table 21: SURF - km by Component Type
Table 22: Trunklines - Deepwater Capex by Region
Table 23: Trunklines - km by Region
Table 24: Floating Production Systems - Deepwater Capex by Region
Table 25: Floating Production Systems - Units by Region
Table 26: Floating Production Systems - Deepwater Capex by Type
Table 27: Floating Production Systems - Units by Type

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