

# **The Subsea Production & Processing Systems Market 2012-2022**

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## **Abstracts**

The world has finite hydrocarbon resources and conventional oil reserves are increasingly in short supply. Furthermore, conventional oil resources from the Middle East are very much under threat of disruption as embargoes on Iranian oil exports come into full effect at the end of June 2012. However, new reservoirs of oil are increasingly being discovered in deep waters and ultra deep waters across the world. These new discoveries are providing a medium term respite to declining production from conventional sources of oil and gas, and reducing risks in upstream oil production from the Middle East. Visiongain has determined that the global capital expenditure in subsea production & processing systems infrastructure in 2012 will be \$8.89bn.

Exploration and production companies are investing heavily in offshore development projects. Most offshore projects in water depths beyond 200-300 metres benefit from subsea production and processing systems to lift hydrocarbons to the surface. As a greater share of oil and gas is supplied from deeper water depths, investment in subsea production and processing systems will grow larger over the next ten years.

Subsea systems not only enable operating companies to optimise production from offshore fields, they also increase the total amount of recoverable hydrocarbons over the life of the well. For example, with pressure boosting systems, total oil recovery rates are significantly increased. Some deepwater oil and gas reservoirs would not have been fully exploited without the aid of subsea systems.

By the early 1970s the world had few commercial oil and gas facilities producing from deepwater reservoirs because challenges such as high temperature and high pressure were too restrictive. Over the years, however, more advanced multiphase pumps, subsea oil/gas/water/sand separation units and wellhead systems have evolved to

overcome the difficulties, enabling companies to produce hydrocarbons from the most challenging environments.

Subsea production and processing systems are advancing further to enable companies to produce from very sensitive and harsh environments such as the Arctic and high temperature, high pressure (HTHP) reservoirs. Subsea systems will not be affected by surface ice formations unlike floating platforms and can provide more controlled production from HTHP wells. Therefore, subsea systems minimise environmental risks associated with production from the Arctic region and in deepwater offshore areas.

## **Unique Selling Points**

Comprehensive analysis of the prospects for the subsea production & processing systems market from 2012-2022.

Analysis and forecasting informed by extensive expert consultation with industry leaders. You will be able to read full transcripts of interviews from 2 leading companies involved in the subsea production & processing systems market.

125 tables, charts and graphs that quantify, analyse and forecast the changing dynamics of the subsea production & processing systems market between 2012-2022.

Forecasts and analysis for the global subsea production & processing systems market between 2012-2022

Forecasts and analysis for 4 subsea production & processing systems submarkets from 2012-2022 with tables of significant contracts in each submarket.

Analysis for 7 regional subsea production & processing systems markets and projections for the period 2012-2022 with tables of significant contracts in each regional market.

Analysis of the forces that influence and characterise the subsea production & processing systems market

Profiles of 54 leading companies operating within the subsea production &

processing systems market.

## **Methodology**

This report has been compiled by combining information obtained from a very wide and rich mixture of primary and secondary research sources, producing a broad industry overview. Visiongain sought opinions from leading figures in the subsea production & processing systems market to underpin the analysis of market drivers and restraints. The study draws on a diverse range of official corporate and governmental announcements, media reports, policy documents, industry statements and expert opinion as a basis for discussing and predicting developments in the subsea production & processing systems market between 2012 and 2022. Visiongain considers that this methodology results in an accurate, objective mixture of analyses and forecasts.

## **Why you should buy The Subsea Production & Processing Systems Market 2012-2022**

You will receive a comprehensive analysis of the subsea production & processing systems market from 2012-2022

The analysis and forecasting has been informed by extensive expert consultation with industry leaders. Within the report, you will be able to read full transcripts of interviews from 2 leading companies involved within the subsea production & processing systems market:

FMC Technologies

Nexans

You will find 125 tables, charts, and graphs that quantify, analyse and forecast the subsea production & processing systems market from 2012-2022

You will receive forecasts and analysis of the global subsea production & processing systems market between 2012-2022

You will discover forecasts and analysis for 7 regional subsea production & processing systems markets for the period 2012-2022 with tables detailing

significant contracts in each regional market.

Europe

Latin America

Asia Pacific

Africa

North America

Eurasia

Middle East

You will be presented with further analysis of projects in 26 of the leading national subsea production & processing systems markets, as well as the rest of the world.

You will find forecasts and analysis of 4 subsea production & processing systems submarkets over the period 2012-2022 with tables detailing significant contracts in each submarket.

Subsea Production & Processing Hardware

Subsea Installation Services

Subsea Umbilical, Risers & Flowline (SURF)

Subsea Inspection & Monitoring

You will receive a SWOT analysis that examines the subsea production & processing systems market from 2012-2022

You will gain profiles of 54 leading companies operating within the subsea production & processing systems market

## **What is the structure of the report?**

Chapter 1 is the executive summary.

Chapter 2 is an introduction to the subsea production & processing systems market providing a clear overview and definition of the market and its characteristics.

Chapter 3 provides extensive analysis of the global subsea production & processing systems market with detailed global and submarket spending forecasts from 2012-2022.

Chapter 4 forecasts and analyses 7 regional, subsea production & processing systems markets. Further market analysis is provided for 26 leading countries, including contract details in each region.

Chapter 5 provides SWOT analysis of the subsea production & processing systems market for 2012-2022, identifying the major strengths, weaknesses, opportunities and threats.

Chapter 6 explains some of the major technologies used in the subsea production & processing systems market and trends in the market.

Chapter 7 features 2 original interviews with industry experts from FMC Technologies and Nexans who offer an insider's perspective on the subsea production & processing systems market.

Chapter 8 lays out profiles of the leading 54 companies operating in the subsea production & processing systems market.

Chapter 9 provides a summary of the report, outlining the main conclusions of the analyses.

Chapter 10 provides a glossary

## **You can order this report today**

Anybody with an interest in the subsea production & processing systems market should gain valuable information and insight from this new study by visiongain, which analyses one of the most exciting markets in the offshore oil & gas sector. The subsea production & processing systems industry offers substantial business and investment opportunities, and is becoming an increasingly important component of the offshore production in several key regional markets.

This visiongain report will be valuable both to those already involved in the subsea production & processing systems market and those wishing to enter the market in the future. Gain an understanding of how to tap into the potential of this market by ordering *The Subsea Production & Processing Systems Market 2012-2022*.

Visiongain is a trading partner with the US Federal Government

CCR Ref number: KD4R6

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## **COMPANIES LISTED**

2H Offshore  
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ABB  
Acergy  
Acteon Group  
AGR Group  
Aker Caspian  
Aker Solutions  
Alstom  
AMEC  
Anadarko Petroleum Corporation  
Apache Corporation  
Apache Energy Limited

Aquatic Intermoor  
ATP Oil & Gas  
Aveon Offshore Ltd.  
Azienda Generale Italiana Petroli (AGIP)  
Baker Hughes  
Bayfield Energy  
Benestad  
Bennex  
BG Group  
BHP Billiton Petroleum  
Bibby Offshore Limited  
Bjorge Naxys AS  
Borders & Southern Petroleum Plc.  
Bornemann Pumps  
BP  
BP Exploration & Production  
British Gas  
Brunei Shell Petroleum Co. Sdn. Bhd.  
Bureau Veritas  
Burullus Gas company  
Cairn Energy  
Cairn India  
Cal Dive International, Inc.  
Calder Ltd.  
Cameron International Corporation  
Cecon  
Centrica  
Centrilift  
CGG Veritas  
Chevron  
Chevron Australia Ltd  
China National Offshore Oil Company (CNOOC)  
China Offshore Oil Engineering Corporation (COOEC)  
Claxton  
Conductor Installation Services  
ConocoPhillips  
ConocoPhillips Scandinavia AS  
Constructora Subacuatica Diavaz  
Converteam

Cortland  
Curtiss-Wright Corporation  
Dana Petroleum Plc.  
Deep Down Inc.  
Deep Ocean Group  
Delek Energy  
Delmar Systems Inc.  
Desire Petroleum Plc.  
Det Norske Veritas  
Diamould  
DOF Subsea  
Dolphin Energy  
Dominion E&P  
Draka Corporation  
Duco  
Duxvalves  
Egyptian Natural Gas Holding Company (EGAS)  
Elf Exploration UK Ltd.  
Elf Petroleum Nigeria Limited  
EMAS AMC Services  
Emerson Process Management  
Eni  
Eni Norge AS  
Expro Group  
Exxon Mobil  
ExxonMobil Development Norway  
ExxonMobil Exploration & Production Norway AS (EENAS)  
Ezra Holdings Ltd.  
Falkland Oil & Gas  
Flowserve Corporation  
Fluor  
FMC Technologies  
Framo Engineering  
Fugro  
Gazprom  
GDF Suez  
GE Oil & Gas  
GEMS Survey Ltd.  
General Electric (GE)

Ghana National Petroleum Corporation (GNPC)  
Global Offshore Pty Ltd.  
Global Process Systems  
GX Technology  
Halliburton  
Hardy Exploration and Production (India) Inc.  
Hardy Oil and Gas  
Hayward Tyler  
Heerema Marine Contractors (HMC)  
Helix Energy Solutions Group Inc.  
Helix Well Containment Group (HWCG)  
Hess Corporation  
Hess Denmark ApS  
Hess Energy  
Honeywell UOP  
Husky Energy  
IKM Gruppen  
Imenco AS  
Inpex  
INTEC Energy  
INTEC Engineering GmbH  
INTECSEA  
Ithaca Energy  
JDR Cable Systems Ltd.  
KazMunaiGaz  
KazMunayTeniz  
Kebabangan Petroleum Operating Company  
KGNT Holding  
Kongsberg Oil & Gas Technologies (KOGT)  
Kosmos Ghana HC (Kosmos Energy)  
Koso Kent Introl Ltd.  
Kreuz Holdings Ltd  
Leistritz Corporation  
LEWA Pumps + Systems  
Lukoil  
Lundin Norway  
Maersk Oil  
Magnum Subsea Systems  
Magnus Subsea Systems

Man Turbo  
Managed Pressure Operations  
Marine and Remote Sensing Solutions Ltd.  
Marine Well Containment Company (MWCC)  
McDermott International Inc.  
MENCK GmbH  
Mermaid Marine Australia Ltd.  
Mermaid Maritime  
Metocean Services International (MSI)  
Mirage  
Mogas Industries  
Mubadala Development Company  
Murphy Oil Corporation  
Murphy Sabah Oil Company  
National Oilwell Varco  
National Petroleum Corporation of Namibia  
NCS Surveying  
Newfield Exploration  
Nexans  
Nexen Petroleum UK Ltd.  
Nigeria Agip Oil Company  
Nigerian National Petroleum Corporation (NNPC)  
Noble Energy inc.  
Nordisk Høyttryk AS  
Noreco  
North Caspian Operation Company (NCOC)  
Ocean Installer  
Ocean Scientific International Ltd.  
Oceaneering International Inc.  
ODI Teledyne  
Office Nationale de Recherches et d' Exploitations Pétrolières (ONAREP)  
Oil and Natural Gas Corporation (ONGC)  
Oman Pearls Ltd.  
OMV  
Origin Energy Resources  
Pearl Energy  
Pearl Oil  
Petro AS  
PetroCedeéo

Petr?leo Brasileiro (Petrobras)  
Petr?leo Brasileiro (Petrobras) E&P Services  
Petr?leos de Venezuela S.A. (PDVSA)  
Petr?leos Mexicanos (Pemex)  
Petroleum Geo-Services  
Petronas  
Petronas Carigali Sdn. Bhd.  
Petrotrin  
PetroVietnam  
Planet Ocean Ltd.  
PreSens  
Proserv  
Pulse  
Qatar Petroleum  
Radoil Inc  
Ravva Oil  
Reinertsen  
Reliance Industries  
Repsol  
Rockhopper  
Rolls-Royce  
Rosneft  
Roxar  
Royal Dutch Shell  
S. B. Submarine Systems Co., Ltd.  
Sabre Oil and Gas  
Saipem  
San Leon Energy  
SapuraClough Offshore  
Scanmudring-Rotech Subsea  
Scanrope Marine AS  
Schlumberger  
Seanic Ocean Systems  
Seatronics  
Shell China Exploration and Production Company Limited  
Shell E&P Offshore Ventures  
Shell Nigeria Exploration and Production Company (SNEPCo)  
Shell UK  
Siemens



Sino-American Energy Corporation

SNC-Lavalin

Sociedade Nacional de Combustiveis de Angola (Sonangol)

Soci  t   Mauritanienne de Hydrocarbures (SMH) (National Oil Company of Mauritania)

Soci  t   Nationale des P  troles du Congo (National Petroleum Company of the Congo, (SNPC))

SOCO International Plc.

Soil Machine Dynamics (SMD)

Solartron

Sonardyne International Ltd.

Sonatrach

Specialist Energy Group Plc.

SPT Group

State Oil Company of Azerbaijan Republic (SOCAR)

Statoil

Stork Technical Services

Stress Subsea Inc.

Subsea 7

Subsea Technologies Ltd.

Subtech

Sulzer Pumps

Suncor Energy

Sundyne Corporation

Svenska Petroleum Exploration

Swiber Offshore Construction Services

Talisman

TEAM

Technip

Teledyne Analytical Instruments

Teledyne Marine

Teledyne Technologies Inc.

Tenaris

Texaco

TNK Vietnam

Total E&P Norge AS

Total Exploration & Production

Total S.A.

Tracerco

Transvac

Trelleborg Offshore  
TrollHetta AS  
Tronic  
Tullow Oil Plc  
Turkmenneft  
Twister BV  
Unique Maritime Group  
Valiant Causeway Limited  
Valiant Petroleum  
Vetco Gray  
Videocon Petroleum  
Viper Subsea  
Weatherford  
Weatherford Petroleum Consultants AS  
Wellstream International Ltd.  
Wood Group  
Woodside Energy  
Worldwide Oilfield Machine Inc.  
WorleyParsons  
WorleyParsons Group  
YPF  
Zetechtics

## **GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT**

American Bureau of Shipping (ABS)  
American Petroleum Institute (API)  
Bureau of Ocean Energy Management (BOEM)  
Bureau of Safety and Environmental Enforcement (BSEE)  
Department of Energy & Climate Change (DECC)  
Department of Interior  
Energy Information Administration (EIA)  
Federal Reserve  
Federal Reserve Bank of St. Louis  
Independent Petroleum Association of America (IPAA)  
Joint Industry Subsea Well Control & Containment Task Force (JITF)  
National Energy Board  
National Ocean Industries Association (NOIA)

Oil & Gas UK

Oil Spill Prevention & Response Advisory Group (OSPRAG)

Organisation of Petroleum Exporting Countries (OPEC)

Petroleum Engineering and Technology Association of Nigeria (PETAN)

United States Geological Survey (USGS)

United States Oil and Gas Association (USOGA)

US Bureau of Labor Statistics

US Environmental Protection Agency

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