

IHS ENERGY

Market Survey System - Drilling and Well Services

Onshore

Offshore

Capital Equipment

Drilling and Well Services

Services

Gain a broad understanding of underlying supply, demand and cost dynamics to better time the cycles of the drilling and well services industry

IHS

The Market Survey System advantage

IHS Market Survey System (MSS) is a comprehensive service providing timely market intelligence on oil and gas industry supplier markets. MSS delivers market insights for strategic planning; knowledge on capital-intensive procurement and business development; in-depth market analysis, including supply, demand, and cost/pricing outlooks for key supplier segments in the onshore oil and gas industry; and detailed information on upcoming projects and trends. A separate MSS Cost Model provided for each market segment analyzes historical and projected costs based on changes to key cost drivers.

IHS is the service provider and operator of MSS, which began as an industry initiative sponsored by a group of major oil and gas operators.

Since the inception of MSS the scope of services has expanded, creating measurable success for our members. As a result, MSS is now considered the industry standard for market intelligence on the oil and gas supplier markets.

National and international oil companies, financial institutions, manufacturers, and engineering, procurement, and construction (EPC) and other service companies benefit from being members of MSS.

In an industry challenged by supply bottlenecks, local content requirements, cost overruns, and project delays, is your company positioned to capitalize on the changing market?

MSS–IHS Drilling and Well Services reports on six major oil and gas segments



Offshore Rigs – Floating



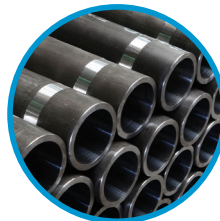
Offshore Rigs – Jackup



Drilling Fluids



Well Logging



Oil Country
Tubular Goods



Onshore Drilling Rigs

The **Floating Rig Market Report** includes detailed analysis of the market for semisubmersible rigs and drillships, including detailed demand and supply analysis as well as day rate forecasts. The report breaks down the market by region and by depth segment.

The **Jackup Rig Market Report** provides information on the history, current situation, and future of the global market for jackup drilling rigs. For analysis the fleet is sub-divided into four segments:

- Independent leg units with rated water depths less than 300 feet.
- Independent leg units with rated water depths equal to 300 feet.
- Independent leg units with rated water depths greater than 300 feet.
- Mat-supported units.

Drilling Fluids market segment covers fluids used in drilling applications. Drilling fluids, also called drilling muds, are key to drilling a well efficiently. Over the years, drilling fluids have become much more sophisticated to meet the ever-increasing drilling challenges. Key focuses of the report is looking at supply/demand balance of raw materials and engineering capacity used in the drilling fluids market segment

Well Logging covers open-hole logging services, including wireline logging and logging-while-drilling (LWD). The market segment does not include production logging, coring, mud logging or fluid samples. The report focuses on new technology, global and regional suppliers as well as any constraints seen in segment.

Oil Country Tubular Goods (OCTG) market segment includes OCTG used for the drilling and completion of oil or gas wells. OCTG includes casing, tubing, and drill pipe. Key topics covered in recent versions of the report include the impact of trade restrictions on

regional supply/demand balances and prices as well the impact of unconventional drilling.

Onshore Drilling Rigs market segment covers all land drilling rigs, including those drilling from a solid land base as well as rigs that are mobile (such as heli-transportable and truck mounted rigs) or working from islands. It also covers rigs that are hybrid in design and can alternate between workovers and drilling or coiled tubing drilling and traditional drilling.

Each market segment report delivers insight and analysis on trends that are crucial to your decision making including:

- The latest updates on key demand trends in selected segments of the oil and gas industry, both onshore and offshore.
- Historical and projected demand and capital spending in each equipment category (both worldwide and regional), including which regions have had the most investment and activity historically and which ones are expected to have the most in the future.
- Historical and projected cost trends for each of the six capital equipment segments, including quarterly tracking of more than 300 cost drivers.
- Analysis of supply capacity and an overview of equipment suppliers, including their capabilities, market share, track record, backlog, and financial situation.
- Analysis of the competitive environment and supply/demand balance in the equipment markets.

MSS also provides the same detailed analysis of various service segments in the oil and gas industry driving demand for equipment, such as oil and gas production, LNG and pipelines, both onshore and offshore.

Features of the Market Survey System

Market segment analysis

MSS covers more than 30 market segments, and new segments are being evaluated and added continuously. Reports provide an in-depth analysis of key supplier markets in the oil and gas industry, including supply and demand projections, cost modeling, and trends. The reports are updated multiple times during the year and delivered in four formats: PDF, Word, PowerPoint summary, and Excel spreadsheet for the MSS Cost Model.

Supplier and contractor profiles

More than 700+ industry suppliers are tracked by our team of analysts. For about 100, we provide profiles with valuable insight on the contractor's capabilities and performance. These reports are updated multiple times each year and delivered in three formats: Word, PDF, and a PowerPoint summary.

News and alerts

Providing timely updates, a daily news service covers contracts, structural changes, project status, developments on major assets, financials, strategic moves, and other significant stories on the suppliers/contractors and markets covered within MSS.

Customized reports

Our dedicated teams of analysts are available to conduct studies and produce customized reports based on member's requests.

MSS delivers value throughout oil and gas organizations:

- Business Development Managers
- Strategic planners and managers
- Project managers
- Supply chain managers
- Supplier quality engineers
- Project procurement managers
- Category managers
- Strategic sourcing
- Market intelligence and research managers

Product benefits

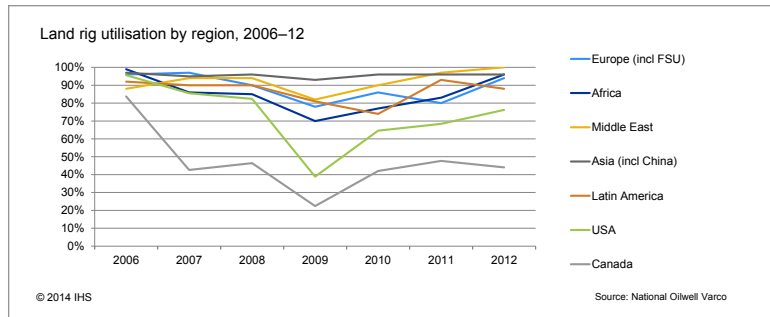
Members use MSS for the following high-impact activities:

- Strategic planning
- Business development
- Strategic sourcing/supply chain planning
- Cost planning
- Negotiations

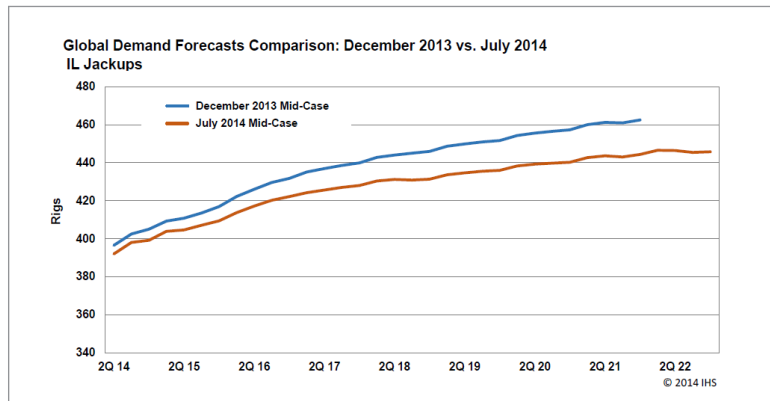


MSS enables oil and gas operators and contractors to:

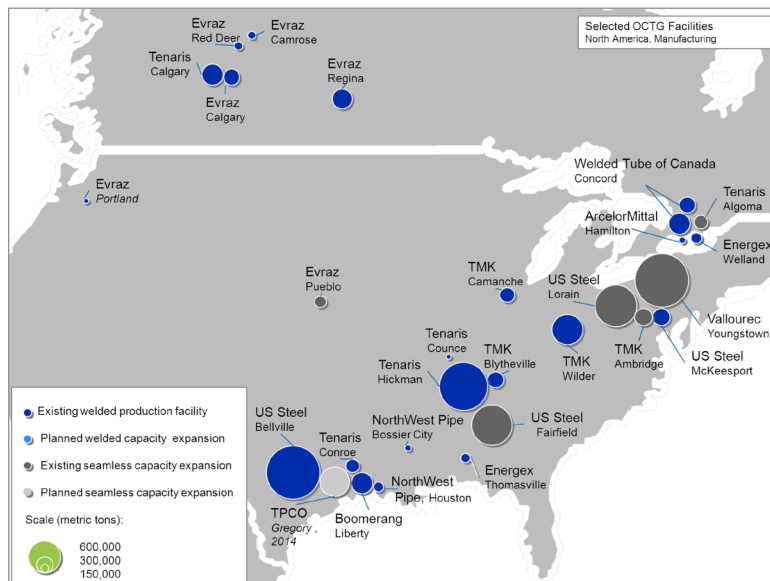
- Make better sourcing decisions and more predictable project deliveries
- Identify supply bottlenecks and opportunities
- Understand the impact of key cost drivers
- Better manage their suppliers (Supplier Relationship Management)



Operator: “As part of sourcing strategy for my category, I need to identify the supply - demand balance”



Operator: “When is the best time to tender for my new project?”

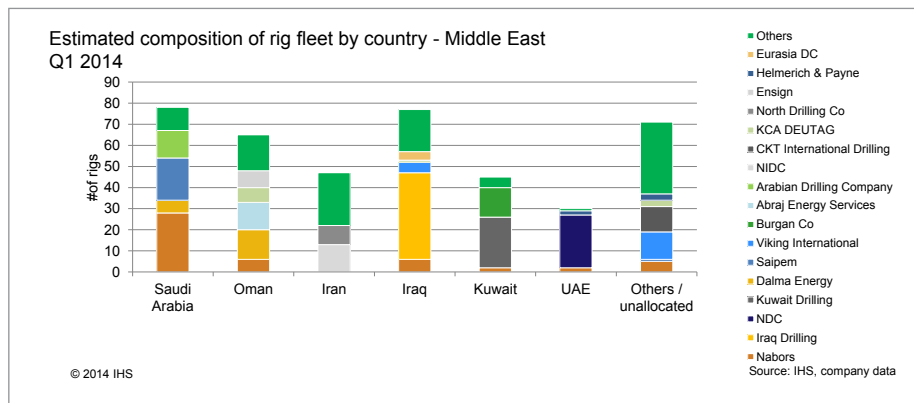


Operator: “Who has the capacity to take on my contracts?”

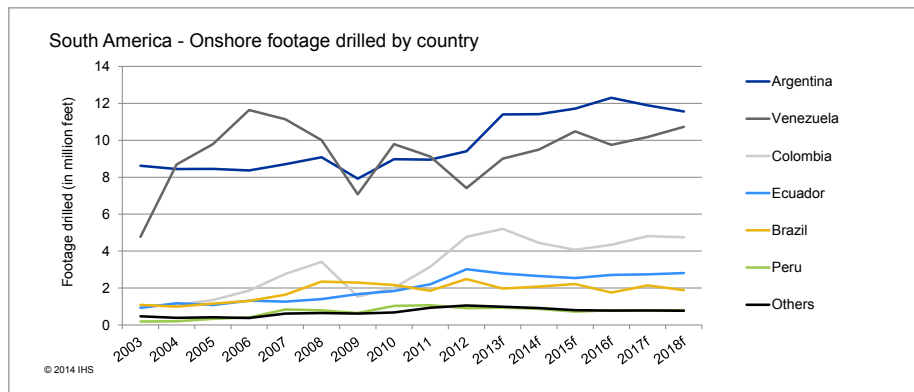
MSS enables suppliers and contractors to

- Identify upcoming projects and future growth markets
- Track performance and projects of key competitors
- Understand future demand requirements and the current supply base
- Foresee opportunities and constraints in the supply chain

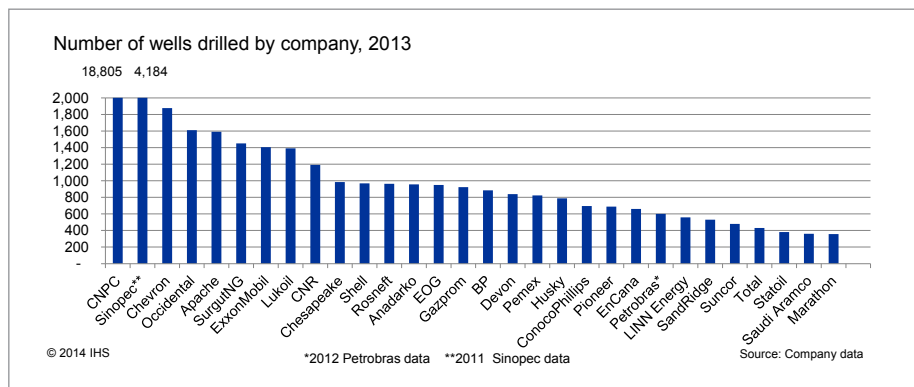
Supplier/Contractor: “I would like to enter a market. Where will the growth take place? Who will be my main competitors, and how fragmented is the market?”



Supplier/contractor: “Should I invest in new production capacity?”



Supplier/Contractor: “Who might be my biggest buyer, and where should I focus my sales effort?”



MSS enables **financial institutions** to

- Identify growth markets
- Identify market structures, growth rates, market shares, and potentials of consolidation
- Assess the financial viability of new projects
- Analyze suppliers' and contractors' potential based on order book developments

MSS delivers value throughout financial organizations:

- Corporate finance
- Advisors
- Portfolio managers
- Investment directors
- Financial analysts
- Financial advisors
- Investment managers

Representative Supplier/Contractor profiles

- Aker Solutions
- Alfa Laval
- Allseas
- AMEC
- Air Products
- ArcelorMittal
- Baker Hughes
- Bechtel
- Black & Veatch
- Bourbon
- Bristow
- Cal Dive
- Cameron
- CB&I
- CCC
- CGGVeritas
- CHC Helicopter
- China Oilfield Services (COSL)
- Chiyoda
- CNPC–China Petroleum Pipeline Bureau
- China Offshore Engineering Company (COOEC)
- China State Shipbuilding Corporation (CSSC)–
- Shanghai Yard
- Daewoo E&C
- China Shipbuilding Industry Corporation (CSIC Offshore)– Dailan Shipbuilding
- Doris Engineering
- Dresser-Rand
- Dril-Quip
- Daewoo Shipbuilding and Marine Engineering (DSME)
- ENSCO
- Entrepose Contracting
- Europipe
- Fluor
- FMC Technologies
- Foster Wheeler
- GE Oil & Gas
- Halliburton
- Heerema Group
- Helix
- Hyundai Heavy Industries (Hyundai HI)
- IHI Corporation
- J Ray McDermott
- Jacobs Engineering
- JGC
- KBR
- Keppel Offshore & Marine
- Kiewit
- Kvaerner
- Larsen & Toubro
- Linde Engineering
- Maersk Oil and Gas Contractors
- MANTurbo
- Marubeni-Itochu
- Mitsui Engineering
- Malaysia Marine and Heavy Engineering (MMHE)
- Modec
- Mustang Engineering
- Nabors
- National Oilwell Varco
- Nippon Steel
- NKT Flexibles
- Noble
- NPCC
- Oceaneering
- Panalpina
- Petrofac
- Prysmian
- Punj Lloyd
- Rolls-Royce
- Saipem
- Samsung HI
- SBM Offshore
- Schlumberger
- Sea Trucks Group
- Seadrill
- SembCorp Marine
- Siemens
- SNC-Lavalin
- Solar Turbines
- Subsea 7
- Sumitomo MI
- Tata Steel Europe (Corus)
- Techint E&C
- Tecnicas Reunidas
- Technip
- Tenaris
- Toyo Engineering
- Transocean
- URS Corporation
- Vallourec
- Weatherford
- Welspun
- Wilbros
- Wood Group
- WorleyParsons

ABOUT IHS ENERGY

IHS Energy, part of IHS (NYSE: IHS), is the industry's authoritative provider of information, analytics, and insight to help clients to understand the interconnected, dynamic forces that shape energy markets and asset performance. Our experts and analytical tools enable clients to continuously improve their strategy and operations across the entire energy value chain covering oil & gas, coal, power, and renewables.

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Drilling and Well services - specific segments

- Offshore rigs - Floaters
- Offshore rigs - Jackups
- Onshore drilling rigs
- Well Logging
- Drilling Fluids
- OCTG

Further MSS coverage

- Construction labor
- Engineering services
- Floating LNG (FLNG)
- Floating production, storage, and offloading (FPSO/FSO) units
- Floaters—tension leg platforms (TLPs), spar, semisubmersibles
- Gas compressors
- Gas turbines
- Heat exchangers
- Industry trends Report
- Upstream Spend Report
- Inspection, maintenance, and repair (platforms)
- Jacket fabrication
- Line pipe
- LNG liquefaction facilities
- LNG regasification terminals
- Oil sands
- Offshore accommodation
- Offshore heavy lift
- Offshore helicopter services
- Offshore installation (diving support vessels [DSVs]/remotely operated vehicle support vessels [ROSVs])
- Offshore pipelay
- Onshore pipelay
- Onshore production facilities
- Subsea equipment
- Topsides fabrication
- Umbilicals and flexible pipe

