

# The Oil & Gas Pipelines Market Analysis 2012-2022

**Table 4.29 UAE Oil & Gas Pipelines Market Forecast 2012-2022 (\$bn, AGR %)**

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Sales \$bn</b>	<b>2.25</b>	<b>2.41</b>	<b>2.59</b>	<b>2.80</b>	<b>3.05</b>	<b>3.33</b>	<b>3.55</b>	<b>3.78</b>	<b>3.99</b>	<b>4.20</b>	<b>4.37</b>	<b>4.53</b>
AGR(%)		7.2	7.3	8.3	8.7	9.3	6.6	6.5	5.5	5.3	4.1	3.5

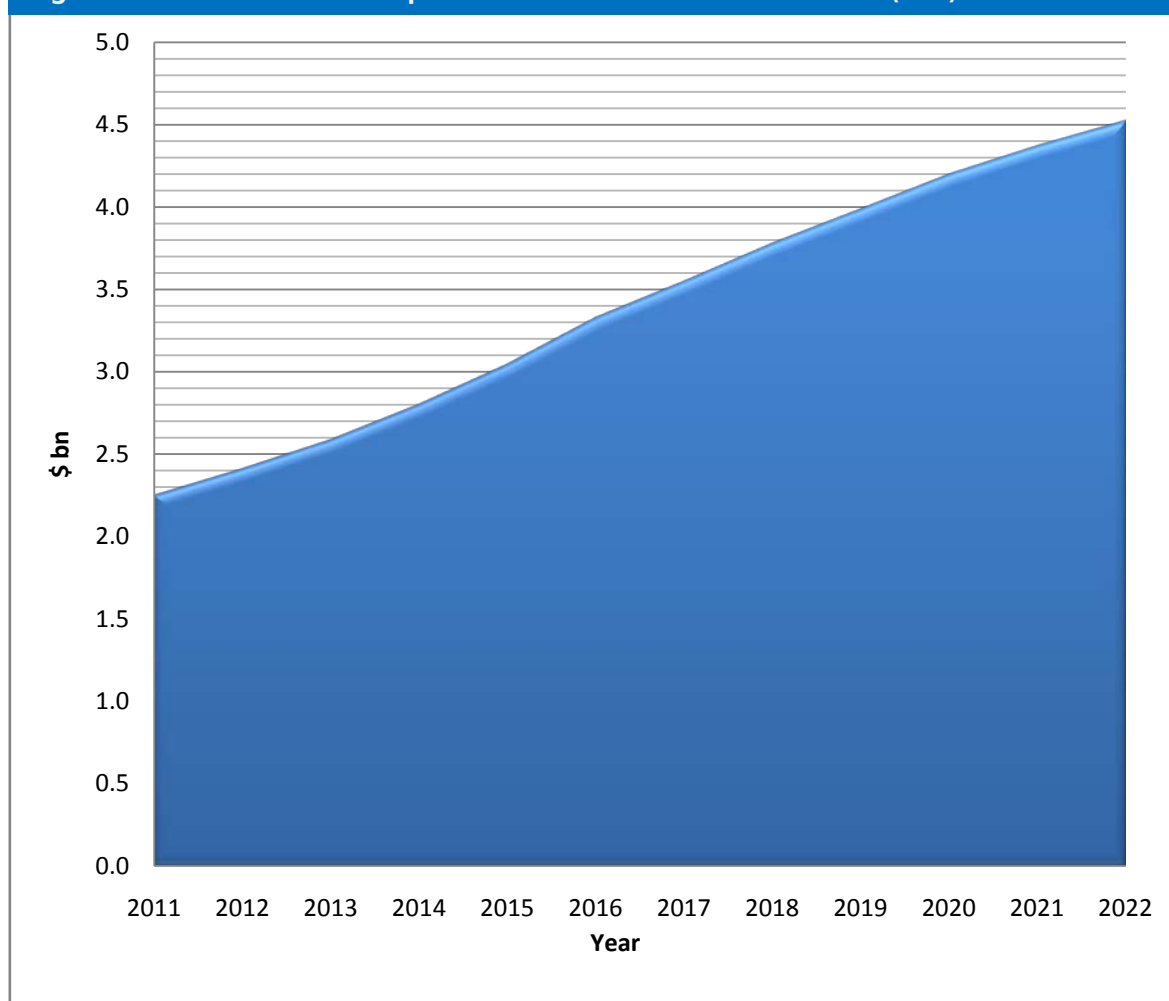
Source: *Visiongain 2012*

**Table 4.30 UAE Oil & Gas Pipelines Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022**

	2012-2022	2012-2017	2017-2022
<b>CAGR (%)</b>	<b>6.5</b>	<b>8.0</b>	<b>5.0</b>

Source: *Visiongain 2012*

**Figure 4.29 UAE Oil & Gas Pipelines Market Forecast 2012-2022 (\$bn)**



Source: *Visiongain 2012*

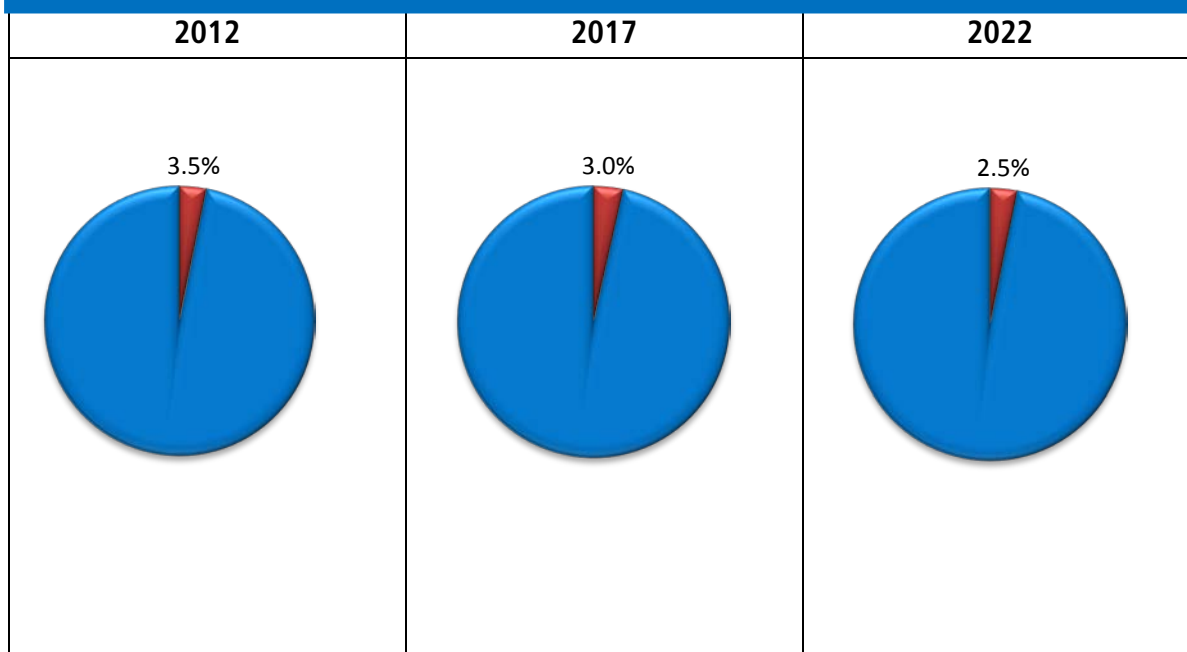
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**Table 4.31 Mexican Oil & Gas Pipelines Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)**

	<b>2012</b>	<b>2017</b>	<b>2022</b>
Market size \$bn	\$2.11bn	\$2.50bn	\$2.68bn
Global market ranking	12th	14th	17th
Global market share %	3.5%	3.0%	2.5%
	<b>2012-2022</b>		
2012-2022 CAGR %	2.4%		
2012-2022 CAGR % ranking	30th		
2012-2022 cumulative market	\$27.12bn		
<b>Market Outlook</b>	<b>positive</b>		

Source: *Visiongain 2012*

**Figure 4.31 Mexican Oil & Gas Pipelines Market Share Forecast 2012, 2017 and 2022 (% Share)**



Source: *Visiongain 2012*

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## 7. Expert Opinion

### 7.1 Det Norske Veritas Ltd (DNV)

Per Wiggo Richardsen is Head of communications in the Europe and North Africa division of DNV, a company which provides risk management services to the variety of market sectors including the oil and gas pipelines industry. Visiongain spoke to Per Wiggo Richardsen in February 2012 and is delighted to include his valuable insight.

#### 7.1.1 DNV's Role in the Pipelines Industry

**Visiongain:** Could you briefly introduce Det Norske Veritas Ltd (DNV) and describe your role in the oil & gas pipelines industry?

**Per Wiggo Richardsen:** DNV is a global provider of knowledge for managing risk. Today, safe and responsible business conduct is both a license to operate and a competitive advantage. Our core competence is to identify, assess, and advise on risk management, and so turn risks into rewards for our customers. From our leading position in certification, classification, verification, and training, we develop and apply standards and best practices. This helps our customers to safely and responsibly improve their business performance.

Our technology expertise, industry knowledge, and risk management approach, has been used to successfully manage numerous high-profile projects around the world. DNV is an independent organisation with dedicated risk professionals in more than 100 countries. Our purpose is to safeguard life, property and the environment. DNV serves a range of industries, with a special focus on the maritime and energy sectors. Since 1864, DNV has balanced the needs of business and society based on our independence and integrity. Today, we have a global presence with a network of 300 offices in 100 countries, with headquarters in Oslo, Norway.

Taking into consideration the energy sector, DNV possesses a broad experience in deep and ultra deep water developments, pipeline transports, natural gas/LNG, refining and petrochemicals, carbon capture and storage and wind power. DNV provides energy companies with risk management across the entire energy value chain. For example, 65% of the world's offshore pipelines are designed and installed to the DNV's pipeline standards.

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## 8.1 Leading NOCs Involved in the Oil & Gas Pipelines Market

### 8.1.1 Abu Dhabi National Oil Company (ADNOC)

Abu Dhabi National Oil Company (ADNOC) was founded in 1971 and its activities include exploration and production of oil and gas, refining, transportation and manufacture of petrochemicals. ADNOC has 15 subsidiaries working in different oil and gas sectors. ADNOC produces more than 2.7 million barrels of oil per day.

The Abu Dhabi National Oil Company is continually growing using state-of-the-art seismic analysis in its search for further reserves, expanding its production, extraction, capacity and improving efficiency in existing field reserves. The Abu Dhabi National Oil Company operates as a fully integrated company, utilising its subsidiaries to handle every aspect of oil and gas exploration, production, refining, processing marketing, supply and transportation as well as the manufacture of petroleum products.

ADNOC controls more than 800km of pipelines which connect ADNOC's main oil and gas producing fields. For example, the Takreer inter-refinery pipeline project aims to transport products between Ruwais, UAN and the ADNOC Distribution depot at Mussafah. In addition, recently a significant investment was directed toward the commissioning of the new Bab- Umm Al Nar crude oil pipeline, and the central oil pipeline from Total ABK to Das Island.

### 8.1.2 Gazprom

As of 2011, Gazprom held the world's largest natural gas reserves being at 35 trillion cubic metres, while production stood at 513.2 billion cubic metres of gas a year. Gazprom's 161,700km long-gas pipeline infrastructure delivers resources to domestic and foreign demand centres. The company is also one of the leading exporters of natural gas, having exported more than 150 billion cubic metres of natural gas a year outside the former Soviet Union. Gazprom is aiming to diversify the Russian export routes and increase energy security in Europe and with that goal it has initiated two large natural gas pipeline projects-Nord and South Stream. Nord Stream will have a capacity of 27.5 billion cubic metres and its first stage was brought on stream at the end of 2011.

### 8.1.3 National Iranian Oil Company

The National Iranian Oil Company is one of the largest oil companies in the world. The National Iranian Oil Company has revenues annually of approximately \$52bn from exports, the level which is however likely to be negatively influenced by the sanctions.