STUDY GOAL AND OBJECTIVES
This report provides the industry executives with strategically significant competitor information, analysis, and insight on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES
◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
◆ To complement the organizations’ internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

METHODOLOGY
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES
The primary information sources include NBS(National Bureau of Statistics of China), China Customs, and Wind etc.
Abstract

Offshore rig can be divided into 8 categories, i.e., drill barge, drillship, inland barge, jack-up, platform rig, semisub, submersible and tender. As of Dec.15, 2011, there had been 48 drill barges, 73 drillships, 74 inland barges, 491 jack-ups, 250 platform rigs, 210 semisubs, 5 submersibles and 40 tenders.

Drillship, jack-up and semisub are the most common. As of Dec.15, 2011, there had been 54 drillships under construction, with the unit price of USD550 million - 650 million; 67 jack-ups under construction, with the unit price of USD140 million -230 million; 16 semisubs under construction, with a large price range. The rigs in harsh waters (such as South China Sea, Gulf of Mexico, North Sea) are expensive, for instance, China's "Offshore Oil 981" costs USD950 million; while a rig working in peaceful waters (such as the waters in West Africa) just values USD150 million.

Undoubtedly, drillships take a lion’s share, 55%, in the offshore rig market. Drillships are mainly used in the waters with the depth of more than 3,000 feet. Currently, most of the drillships under construction have the rated water depth of 10,000-12,000 feet, and their maximum drilling depth is generally 35,000-40,000 feet. The drillship Sedco No.445 designed by Earl & Wright in 1971, built by Japan's Mitsui and managed by Sedco is the world's first drillship, with the largest rated water depth of 7,200 feet. As yet, the drillship is still at work, but it is rendered to detect seabed mineral resources, rather than drilling.
Most of drillships before 2000 were built when the oil crisis occurred. At present, only about 20 drillships of them are still working, most of which were built by Japanese and European manufacturers. After 2000, the human being endeavors to explore oil and gas resources in deep waters, which generates soaring demand for drillships. South Korean builders almost monopolize the market; Samsung Heavy Industries is building 20 drillships, DSME 10 units and Hyundai Heavy Industries 11 units. Brazil's EAS is building 7 drillships. EAS is a joint venture co-funded by Samsung Heavy Industries, Queiroz Galvao and Camargo Correa. Dalian Subsidiary of South Korea's STX is building 2 drillships now.

The drillship built by COSCO Shipyard for Dalian Deepwater Developer is China's first drillship, with the maximum drilling depth of 30,000 feet. CSSC's Shanghai Shipyard is building 2 drillships now, with the designed rated water depth of merely 3,000 feet.

The operation of drilling rigs is risky. The Gulf of Mexico oil spill made BP have to pay tens of billions of dollars. For the operation of drilling rigs, the requirements on operators are very high; particularly in harsh seas and deep waters, and the requirements on the qualification of the staff are strict. This is why most of drilling rigs are not operated by oil giants, but by veteran operators. High risks and threshold bring high returns. The operating margin of drilling rig operators is almost never less than 30%, even 40% or more is common. These operators do not care about the short-term ups and downs of oil prices, and they are making long-term (5-10 years) plans. Even in the economic downturn, they dare to conduct large scale investment.
Number of Drillships under Construction by Operators, Dec 2011
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