

Iraq Drilling and Oilfield Services Industry Outlook to 2018 - Rising Crude Oil Production and Oil Revenue to Spur Growth

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Abstracts

The report titled 'Iraq Drilling and Oilfield Services Industry Outlook to 2018 – Rising Crude Oil Production and Oil Revenue to Spur Growth' presents a comprehensive analysis of the drilling and oilfield services industry, including market size of the drilling industry in Iraq by value in both southern and northern regions of Iraq. Additionally, the market size of the drilling industry in Iraq has also been identified on the basis of number of completed wells, producing wells and active rigs. The market size of oilfield services industry has been determined by value in both the southern and northern regions of Iraq along with the market segmentation by different types of services such as reservoir and seismic services, engineering and fabrication services, operations and others. The report also entails a detailed description on the recent trends and developments in the market, government regulations and competitive scenario of major operators and major service providers in the industry along with providing market share of major companies in the overall market.

Iraq drilling industry plays a very important role in building the nation's economy since 95.0% of the government's income is derived from Iraq's oil revenue. The drilling industry in Iraq has evolved significantly from a highly centralized economy with small investments from the private sector to a market driven economy. The Iraqi drilling industry has showcased double digit growth reaching to USD ~ million in 2013 at a CAGR of 57.6% since 2008. The southern region of Iraq has a concentration of super-giant fields such as Rumaila and Zubair and the size of drilling industry in this region grew from USD ~ million in 2008 to USD ~ million in 2013, at a CAGR of ~% from 2008-2013. Additionally, the Iraqi Kurdistan drilling industry over the years has showcased growth from USD ~ million in 2008 to USD ~ million in 2013, thus reaching at a CAGR of ~% during the period.

The market for oilfield services recorded at a CAGR of 34.0% over the period of 2008-2013. During the year 2009, the oilfield services industry grew by USD ~ million, thereby indicating a 28.5% growth over the previous year. In 2013, the engineering, fabrication and installation services registered massive revenue contribution of ~% worth USD ~ million, which was followed by the operations segment with a revenue contribution of ~% in 2013.

Schlumberger, Halliburton, Baker Hughes, Weatherford also known as 'Big Four' are the major diversified oilfield services companies which offer wide variety of oilfield services ranging from seismic survey to well abandonment. These companies namely; Schlumberger, Halliburton, Baker Hughes and Weatherford together dominated approximately ~% of the total market share in the Iraqi oilfield services industry in 2013.

Royal Dutch Shell was the market leader in the southern Iraq drilling industry by commanding an approximate share of ~% in the overall market revenue in 2013. CNPC stood as the second largest player in the southern Iraq drilling industry. The company captured market share of ~% in the total southern Iraq drilling market revenue as of 2013. Additionally, Gazprom, Eni, TPAO were some of the other major players in the southern region of Iraq drilling industry.

The future of the Iraq drilling and oilfield services industry is expected to be favorable on account of increased crude oil production, huge FDI inflows, improved oil export revenue coupled with increased drilling and exploration activities in the country. Petroleum discoveries in recent years, recovery potential of the reserves; critical number of acreages awarded to oil companies and access to drilling rigs fleet in medium term due to newbuilds will be the key factors that are expected to play a significant role in the growth of drilling and exploration activities. The overall drilling industry in Iraq is anticipated to expand from USD ~ million in 2013 to USD ~ million by growing at a stupendous CAGR of 72.3% over the period of 2013-2018. On the other hand, the oilfield services industry is anticipated to increase from USD ~ million in 2013 to USD ~ million in 2018 at a CAGR of 38.3%.

KEY TOPICS COVERED IN THE REPORT

The market size of the drilling industry in the southern and northern regions of Iraq in terms of value in the last six years (2008 – 2013)

The market size of overall drilling industry in Iraq in terms of number of

completed wells, producing wells and active rigs in the last six years (2008 – 2013)

The market size of oilfield services industry in the southern and northern region of Iraq by value in the last six years (2008-2013)

Iraq oilfield services industry segmentation by type of services including reservoir & seismic, exploration & production drilling, engineering, fabrication & installation, operation and decommissioning services.

Market share of major operators and service providers and company profiles of the major brands and players operating in the drilling and oilfield services industry in Iraq

Trends, developments and government regulations in drilling and oilfield services industry in Iraq

Future projections and macro economic factors of the drilling and oilfield services industry in Iraq

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