

Global Onshore Drilling Rig Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Onshore Drilling Rig market size was valued at US\$ 4921 million in 2025 and is forecast to a readjusted size of US\$ 7185 million by 2032 with a CAGR of 5.5% during review period.

An onshore drilling rig is a mobile or fixed structure used to drill wells for oil or natural gas on land. These rigs use a derrick, drill string, and power systems to bore through the Earth's surface, acting as a faster, cheaper, and simpler alternative to offshore rigs.

In 2025, global production of onshore drilling rigs is projected to reach 486 units, with an average price of \$9.84 million per unit and an average gross margin of 22.8%.

From the perspective of the supply landscape, global manufacturers of onshore drilling rigs can be categorized into three groups. The first group consists of international enterprises specializing in high-end onshore rigs and automation systems—such as NOV, Drillmec, Bentec, and Herrenknecht Vertical. Their core strengths lie in advanced AC electric drive systems, automation capabilities, pipe handling technologies, expertise in extreme operating environments, and custom engineering solutions. The second group comprises large-scale Chinese manufacturers of complete oil and gas equipment packages—including Honghua, BOMCO, Jereh, Kerui, RG Petro-Machinery, and SJ Petroleum Machinery. Their competitive advantages stem from integrated manufacturing capabilities, price competitiveness, extensive experience with desert, deep-well, and mobile drilling rigs, and their ability to execute deliveries within the 'Belt and Road' markets. The third group consists of regional manufacturers of mobile rigs and oilfield equipment—such as UPET, Loadcraft, and Dragon. These companies primarily focus on mobile rigs, small-to-medium power rigs, dual-purpose

workover/drilling equipment, and catering to specific regional oil and gas markets.

Regarding the demand structure, the market for onshore drilling rigs is primarily driven by factors such as oil and gas capital expenditures, fluctuations in oil and natural gas prices, the pace of shale gas and tight oil/gas development, investments in deep and ultra-deep wells in the Middle East and China, rig fleet modernization in North America, the expansion of deep geothermal drilling projects, and the phasing out of aging mechanical drilling rigs. For 2025, the global onshore drilling rig market does not follow a simplistic 'more new wells equal more rig shipments' logic; this is because a significant portion of drilling demand is met by existing rig fleets and the assets of drilling contractors. Consequently, demand for new rigs from Original Equipment Manufacturers (OEMs) is driven primarily by the need for new drilling capacity, the replacement of aging rigs, regional market expansion, automation upgrades, and projects situated in specialized or challenging environments. Westwood, a firm that continuously tracks global onshore drilling activity, notes that this industry operates under two distinct statistical frameworks: one pertaining to equipment manufacturing and the other to actual drilling operations.

From a technological standpoint, the future trajectory for onshore drilling rigs involves a shift toward electric drive systems, automation, enhanced mobility (fast-moving capabilities), reduced reliance on manual labor, and increased capacity for deep-well drilling. While traditional mechanical rigs remain suitable for certain low-cost shallow-well applications and specific regional markets, newly constructed high-end rigs are increasingly incorporating advanced features such as AC Variable Frequency Drive (VFD) systems, automated drill feed mechanisms, top drives, automated pipe handling systems, power catwalks, iron roughnecks, rig walking systems, centralized driller's cabins, and digital monitoring and control systems. According to Drillmec's specifications, its land rigs cover a hook-load range of 60 to 907 tons and encompass various types, including conventional, swing-lift, slingshot, mobile, automatic hydraulic, and STRIKER models. Jereh's skid-mounted rigs are designed to handle drilling depths ranging from 4,000 to 9,000 meters. Meanwhile, BOMCO has unveiled a 6,000 HP automated rig specifically engineered for ultra-deep well applications—reaching depths of 10,000 meters or more—within the Chinese market.

In terms of the competitive landscape, the land rig manufacturing industry does not compete solely on low pricing; rather, success hinges on a combination of 'drilling depth capability + reliability + relocation efficiency + automation + after-sales support.' North American shale plays prioritize rapid relocation, walking/cluster drilling operations,

automation, and high mechanical utilization rates. The Middle East and Central Asia emphasize reliability under high-temperature desert conditions, deep-well capabilities, and long-term contract stability. China focuses on deep-earth engineering, shale gas development, the localization of equipment to replace imports, and ultra-deep well capabilities. Certain European markets, conversely, are more closely tied to geothermal energy projects as well as low-noise, low-emission urban drilling operations. Data from Herrenknecht Vertical indicates that its rigs are suitable for both oil/gas and geothermal wells, reaching depths of up to 8,000 meters; similarly, Westwood has reported the deployment of its B18 rig in a geothermal well project in France. These examples demonstrate that deep geothermal drilling is emerging as a new frontier for growth among select land rig manufacturers.

Regarding industry prospects, the land rig sector belongs to a category of capital-intensive equipment industries characterized by strong cyclical and infrequent procurement cycles; consequently, its growth trajectory is unlikely to be as smooth or linear as that of consumables or outsourced services. In the short term, rig orders are significantly influenced by fluctuations in oil and natural gas prices, E&P (exploration and production) capital expenditures, and geopolitical developments. Medium-to-long-term opportunities stem from increased production efforts in the Middle East, ultra-deep well and shale gas development in China, the replacement of aging rig fleets in North America, deep geothermal drilling projects, safety-focused automation retrofits, and the adoption of low-emission electric drive systems. Key risks include delays in drilling capital expenditures triggered by declining oil prices, rising idle rates among existing rig fleets, volatility in orders for new rigs, the growing in-house modification capabilities of drilling contractors, and the potential disruption to global pricing structures caused by the influx of low-cost equipment from China. Over the long term, manufacturers possessing deep/ultra-deep well engineering expertise, a global service network, advanced automation control systems, modular delivery capabilities, and robust after-sales support will be best positioned to sustain their competitive advantages.

This report is a detailed and comprehensive analysis for global Onshore Drilling Rig market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Onshore Drilling Rig market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Onshore Drilling Rig market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Onshore Drilling Rig market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Onshore Drilling Rig market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Onshore Drilling Rig

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Onshore Drilling Rig market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NOV Inc., Drillmec S.p.A., Bentec GmbH Drilling & Oilfield Systems, Herrenknecht Vertical GmbH, UPET S.A., Loadcraft Industries, Ltd., Dragon Products, LLC, Honghua Group Limited, Baoji Oilfield Machinery Co., Ltd., Jereh Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Onshore Drilling Rig market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Skid-mounted Land Rig

Truck-mounted Drilling Rig

Trailer-mounted Drilling Rig

Walking Land Rig

Pad Drilling Rig

Market segment by Rated Power

Below 750HP

750–1,000HP

1,001–1,500HP

1,501–2,000HP

2,001–3,000HP

Above 3,000HP

Market segment by Drilling Depth Capacity

Below 3,000m

3,000–4,500m

4,501–6,000m

6,001–8,000m

8,001–10,000m

Above 10,000m

Market segment by Application

Conventional Oil Drilling

Conventional Gas Drilling

Shale Gas Drilling

Tight Oil and Gas Drilling

Coalbed Methane Drilling

Other

Major players covered

NOV Inc.

Drillmec S.p.A.

Bentec GmbH Drilling & Oilfield Systems

Herrenknecht Vertical GmbH

UPET S.A.

Loadcraft Industries, Ltd.

Dragon Products, LLC

Honghua Group Limited

Baoji Oilfield Machinery Co., Ltd.

Jereh Group

Shandong Kerui Petroleum & Gas Equipment Co., Ltd.

RG Petro-Machinery (Group) Co., Ltd.

SJ Petroleum Machinery Co.

China Petroleum Technology & Development Corporation

Jereh Petroleum Equipment & Technologies Co., Ltd.

KERUI Petroleum & Gas

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Onshore Drilling Rig product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Onshore Drilling Rig, with price, sales quantity, revenue, and global market share of Onshore Drilling Rig from 2021 to 2026.

Chapter 3, the Onshore Drilling Rig competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Onshore Drilling Rig breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Onshore Drilling Rig market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Onshore Drilling Rig.

Chapter 14 and 15, to describe Onshore Drilling Rig sales channel, distributors, customers, research findings and conclusion.

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