

# **Hydraulic Workover Unit Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Service (Workover, Snubbing), By Capacity (Below 150 Tonnes, 151-200 Tonnes, Above 200 Tonnes), By Installation (Skid-Mounted, Trailer-Mounted), By Application (Onshore, Offshore), By Region, Competition 2018-2028.**

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## **Abstracts**

Global Hydraulic Workover Unit Market was valued at USD 7.58 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.8% through 2028. The COVID-19 pandemic initiated by the spread of the novel coronavirus has had a damaging impact on the global industrial landscape. This industry faced significant losses and have had to reduce operations due to the imposition of rigorous lockdowns to contain the spread of the COVID-19 virus. Consequently, the outbreak of the virus has transformed the demand for HWUs. As the hydraulic workover unit industry is majorly dependent on oil and gas activities, the decline in oil prices in a long time has significantly impacted the investment in the instrument. The imposition of lockdowns in various countries and the shutting down businesses except for essential services with minimal workforce affected the energy demand. This factor has directly impacted work in the well interventions sector.

### **Key Market Drivers**

#### **Increasing Focus on Brownfields to Bolster Market Growth**

A mature oil and gas field is past peak production. These oilfields account for a majority of the world's crude oil production. With enhanced technological approaches like

enhanced oil recovery (EOR), the recovery of mature oil fields has seen a tremendous increase. Increasing recovery from mature fields has necessitated prolonging the well and improving production using well interventions and workover. With the deterioration in oil reserves, companies have increased their focus on inventing equipment required to access remaining reserves on mature wells. The prime focus is to improve recovery and prolong life. But the amplified water cut with constrained topside facilities, growing flow assurance problems, rising operating costs, and integrity issues because of the maturing facilities have made brownfield operationally and economically impractical. The increasing requirement for workover services is anticipated to bolster the market growth.

### Increasing Energy Requirement to Propel Demand

The growing population explosion and urbanization has resulted in a spike in energy requirement from the various end-user sector. As renewable energy is still in an early adoption stage of its product life cycle, the majority of power generation is handled by hydrocarbons. Due to inadequate development of other energy sources, the growing global oil and gas demand enhances well drilling and maintenance. The increase in crude oil and shale gas production capacities and an increasing number of brownfields is expected to enhance the well workover and intervention demand, fueling the market growth.

### Amplified Investment In Offshore Oil and Gas Developments to Enhance HWU Demand

In July 2019, Kuwait signed a USD 600 billion offshore exploration contract with Halliburton. The contract aimed to drill six exploration wells in the next two to three years, which is anticipated to increase around 100,000 b/d in the forecast period. The United Arab Emirates invested approximately 31,000 square kilometers of acreage for offshore oil gas production, majorly in the Abu Dhabi and Ras Al Khaima regions. In January 2020, Russia announced a significant investment of around USD 300 billion for new offshore oil and gas projects. The world is likely to derive massive oil and gas from offshore production. The more arduous production conditions in offshore locations increase the investment in more complex and newer technologies like hydraulic workover units. The onerous requirement for offshore with ease of operations is the primary market driver during the projected period.

### Growing Demand for Efficient Technology to Drive Market Growth

There is a substantial increase in demand for developing a safe, versatile, and cost-

effective tool for workover and well intervention operations due to the increasing number of mature oil fields. This factor bolsters the demand for HWUs globally. This equipment can be efficiently used with low setup times and are more cost-effective. Earlier workover rigs were used for similar operations, which took a lot of time and effort to be set up and used. Further, the wells had to be killed before operations, However, with newer technologies, HWUs with snubbing capabilities have made snubbing capabilities possible with newer technologies. In 2021, MEIL, India started manufacturing a new type of HWUs with indigenous know-how, especially for the local market. The increasing demand for more effortless functioning, avoiding well-killing, secure and cost-effective well intervention units is an important trend for the hydraulic workover unit market.

### Key Market Challenges

#### Increasing Consumer Obligation Towards Renewable Energy to Restrain Market Growth

The primary factor restraining the hydraulic workover unit market growth is the consumer shift towards clean fuels. The increasing requirement of the renewable energy sector will undoubtedly decrease the investment being made in the oil and gas energy sector, which will harm the well intervention sector. The increasing proportion of power generation using renewable energy can hinder the principal investments being made for oil and gas. Also, the necessity to reduce carbon emissions has powered the acceptance of renewable energy, with government incentives being granted worldwide. Further, the developing competence of renewables for power generation with durable benefits can result in increased adoption over conventional fuels. **Volatility in Oil Prices:** The hydraulic workover unit market is sensitive to fluctuations in oil prices. Low oil prices can lead to reduced investment in oil and gas projects, impacting the demand for hydraulic workover services.

#### Environmental and Regulatory Constraints

Increasing environmental concerns and stricter regulations can pose challenges to oil and gas operations, affecting the growth of the hydraulic workover unit market. Compliance with environmental standards may require additional investments and operational adjustments.

**Global Economic Conditions:** Economic uncertainties and downturns can lead to a decrease in capital expenditure by oil and gas companies, affecting their willingness to invest in hydraulic workover services. Advancements in alternative technologies or

methods for well intervention and maintenance could pose a challenge to the traditional hydraulic workover approach. The hydraulic workover unit market, like any other industry, can be affected by disruptions in the supply chain, which may impact the availability of key components and equipment.

## Key Market Trends

### Increasing demand for hydraulic workover units for offshore oil & gas operations

Increasing demand for hydraulic workover units for offshore oil & gas operations is expected to boost the growth of the global hydraulic workover unit market during the forecast period. Shale natural gas resources are a part of shale formations. They contain significant accumulations of natural gas and oil. According to the EIA (Energy Information Administration) predictions, natural gas production will reach 554 BcF/d by 2040. The largest component of the market growth is natural gas production from shale resources. It will grow to 168 BcF/d by 2040. Participating regional countries like the US, Canada, China, and Argentina have commercial shale gas production. Moreover, other countries such as Mexico and Algeria will encourage the development schedules of shale resources with the help of technological funding for improvements. Hydrocarbon's mature fields are responsible for its past peak production. Mature oilfields have more than 70% of the world's oil and gas production. The constant recovery of mature oil fields is increasing. 80% of these estimated reserves are found in countries like the Middle East, North America, Asia Pacific, and Latin America. Also, there has been an easy recovery from mature fields that involves extending the life of the well and improving production. For the same, various methods such as artificial lifts, intervention, and snubbing are used. Mature oil fields are a part of conventional, unconventional, or deepwater reservoirs. It depends on its permeability and the reservoir's flow regime. Major oil & gas companies are shifting their attention toward technological advancements to cater to the decline in reserves with the help of inventing tools and techniques.

## Segmental Insights

### Application Insights

Due to the high oil production from the onshore segment and the larger number of onshore oil rigs, the segment dominates the market. Moreover, most of the onshore oil rigs are mature and drive significant demand for the market. The offshore segment is increasing faster due to the rising shift towards offshore and increasing complexity of

operations that demands easy to set up equipment like the HWUs.

### Capacity Insights

The concentrated portion of the equipment manufactured is skid-mounted due to its ease of setup and utilization in onshore and offshore activities. The trailer mounted HWUs are more portable and require less space but can be used only in onshore applications. Due to rising demand from the offshore segment, the skid-mounted segment is growing at a high CAGR.

### Regional Insights

The North American region holds a significant share in the market due to the high adoption of workover and snubbing services, coupled with demand for ease and efficiency of operations and technological advancement. Also, the rising proportion of mature oilfields in the region drives the market. Additionally, the government norms to reduce emissions led to companies finding it unviable to increase exploration and an increased necessity to prolong existing oil wells and drive the region's market. Middle East & Africa is the second-most dominant market due to the increased proportion of mature oil wells in the region. The GCC countries contribute to a majority of the demand for the equipment in the region. China dominates the market in the Asia Pacific. The rapid industrialization and urbanization, which has led to increased energy demand, is a significant driver for the market. The offshore development, coupled with maturing offshore sites in Europe, drives the region's demand for HWUs.

The hydraulic workover unit market in North America is estimated to account for the highest share, where per capita energy consumption, exploration and production of oil & gas, and advancements in upstream operations drive the growth of the regional market. According to the US Energy Information Administration (EIA), in 2018, approximately 6.44 million BPD of crude oil was produced from tight oil resources in the US. The increase in the extraction and production of oil and gas boosts the demand for hydraulic workover units for performing routine well maintenance for land, inland waters, and offshore installations. These developments lead to an increase in the demand for a cost-efficient method to repair, resulting in the installation of hydraulic workover units. Such factors are expected to drive the growth of the hydraulic workover unit market in North America.

### Key Market Players

Baker Hughes

Halliburton

National Oilwell Varco

Velesto Energy Berhad

Canadian Energy Equipment Manufacturing FZE

Schlumberger

Precision Drilling Corporation

Archer

CUDD Energy Services

#### Report Scope:

In this report, the Global Hydraulic Workover Unit Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Global Hydraulic Workover Unit Market, By Service:

Workover

Snubbing

#### Global Hydraulic Workover Unit Market, By Capacity:

Below 150 Tonnes

151-200 Tonnes

Above 200 Tonnes

### Global Hydraulic Workover Unit Market, By Application:

Onshore

Offshore

### Global Hydraulic Workover Unit Market, By Installation:

Skid-Mounted

Trailer-Mounted

### Global Hydraulic Workover Unit Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Hydraulic Workover Unit Market.

## Available Customizations:

Global Hydraulic Workover Unit Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information



Detailed analysis and profiling of additional market players (up to five).

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