

Offshore Drilling Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Jackups, Semisubmersible, Drill Ships, and Other Types), By Depth (Shallow Water and Deepwater and Ultra-deepwater), By Region, By Competition 2019-2029

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Abstracts

Global Offshore Drilling Market was valued at USD 35.7 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 5.4% through 2029. The global offshore drilling market continues to exhibit substantial growth owing to various factors that encompass technological advancements, increasing energy demand, and the exploration of untapped reserves. Technological innovations in drilling techniques, such as advanced rig designs and improved equipment capabilities, have significantly enhanced operational efficiency and safety measures, enticing investments in offshore drilling projects. Moreover, the escalating global demand for energy, particularly from emerging economies, propels the exploration and extraction activities in offshore regions, stimulating market expansion.

The market's growth is further amplified by the discovery of new oil and gas reserves in deepwater and ultra-deepwater locations, which offer substantial opportunities for exploration and production companies. Additionally, governmental initiatives to support offshore exploration activities through favorable regulatory frameworks and incentives contribute to market development. However, the market also faces challenges such as environmental concerns, stringent regulations, and the volatility of oil prices, which impact investment decisions and operational strategies within the industry. Nevertheless, with continued technological advancements and the relentless pursuit of new energy sources, the global offshore drilling market is poised for sustained growth

and expansion in the foreseeable future.

Key Market Drivers

Technological Advancements in Offshore Drilling Equipment

Technological innovations stand as a primary driver propelling the offshore drilling market's growth. Advancements in drilling equipment, rig designs, and exploration technologies have revolutionized the industry. Ultra-deepwater drilling, for instance, has become increasingly viable due to enhanced drilling techniques and cutting-edge equipment. Innovations like advanced blowout preventers, 3D seismic imaging, and real-time monitoring systems have substantially improved safety measures and operational efficiency. These innovations allow companies to navigate more complex and challenging offshore environments, tapping into reserves previously deemed inaccessible. Moreover, the development of automation and robotics in drilling processes has not only boosted efficiency but also reduced operational risks, attracting investments and fostering market expansion.

Rising Global Energy Demand

The perpetual surge in the worldwide thirst for energy persists as a pivotal force propelling the expansion of offshore drilling endeavors. The march of emerging economies toward industrialization, coupled with burgeoning population growth, serves as a catalyst catapulting the demand for energy to unprecedented heights. This upward trajectory in energy requisites acts as a compelling impetus compelling exploration and production entities to redirect their focus toward offshore reservoirs. The allure of offshore drilling lies in its provision of an entryway to expansive and largely untapped reservoirs of oil and gas. These reserves, nestled within offshore domains, hold a distinct allure, offering substantial reservoirs that often surpass the capacities found in onshore sites. This appeal renders offshore locations an increasingly enticing prospect for energy corporations ardently endeavoring to satiate the insatiable global appetite for hydrocarbons.

Exploration of Untapped Reserves

The pursuit of untapped reservoirs nestled within offshore territories stands as a defining force steering the trajectory of market expansion. With traditional onshore reserves gradually depleting, corporations are redirecting their focus toward offshore domains, notably targeting the realms of deepwater and ultra-deepwater sites. Recent

breakthroughs in uncharted territories, coupled with strides in seismic imaging technologies and reservoir characterization methodologies, have instilled a robust sense of confidence regarding the existence of substantial untapped reservoirs. This compelling driver serves as a catalyst spurring investments in offshore drilling initiatives, fueled by the tantalizing prospect of unearthing significant caches of oil and gas. The allure of these potential deposits continues to propel relentless exploration endeavors within offshore landscapes, buoyed by the promise of substantial discoveries.

Governmental Support and Regulatory Frameworks

The instrumental role of supportive governmental policies and regulatory frameworks cannot be overstated in nurturing the burgeoning landscape of the offshore drilling market. Governments worldwide extend a welcoming hand to the industry, providing a gamut of incentives, tax concessions, and regulatory structures meticulously tailored to invigorate and galvanize offshore exploration and production endeavors. This concerted effort is orchestrated with multifaceted objectives—to entice substantial investments, fuel the engine of technological progress, and fortify the bedrock of energy security. Furthermore, the synergistic rapport fostered between governmental bodies and industry stakeholders manifests in collaborative ventures, birthing alliances and partnerships that serve as veritable catalysts propelling the wheels of offshore drilling projects. These symbiotic alliances not only expedite initiatives but also amplify the impetus behind offshore drilling activities, acting as accelerants fuelling the market's rapid expansion.

Market Expansion in Deepwater and Ultra-Deepwater Regions

The drive towards expanding market horizons into the realms of deepwater and ultra-deepwater locales emerges as a pivotal force propelling the offshore drilling industry. A fusion of technological strides intertwined with the unearthing of substantial reserves within these intricate terrains has unfurled novel opportunities for offshore exploration. Corporations, recognizing the potential, are channeling escalated investments into the exploration and extraction ventures within these frontiers, capitalizing on refined capabilities tailored to retrieve resources from unparalleled depths. Despite the intricate web of technical intricacies and the augmented operational costs that characterize deepwater drilling, the irresistible allure of untapped reservoirs persists as the driving impetus, fuelling the inexorable growth trajectory within these domains.

Key Market Challenges

Environmental Concerns and Regulatory Constraints

One of the foremost challenges confronting the offshore drilling market revolves around environmental concerns and stringent regulatory constraints. Offshore drilling activities inherently pose risks to marine ecosystems, wildlife, and coastal areas. Accidental oil spills, habitat disruption, and the release of pollutants into the ocean can have devastating environmental consequences. Consequently, regulatory bodies worldwide have implemented stringent guidelines and standards to mitigate these risks, necessitating adherence to strict environmental protocols throughout the drilling process. Compliance with these regulations significantly increases operational costs for exploration and production companies. Additionally, navigating complex and evolving regulatory landscapes across different jurisdictions demands substantial resources and expertise, further adding to the industry's challenges.

Volatility of Oil Prices and Market Uncertainties

The offshore drilling market is significantly impacted by the inherent volatility of oil prices and market uncertainties. Fluctuations in global oil prices directly influence investment decisions and project viability. The market's sensitivity to oil price fluctuations affects the profitability of offshore drilling projects, impacting companies' revenue streams and investment prospects. Moreover, geopolitical tensions, global economic conditions, and shifts in energy policies among major oil-producing nations contribute to market uncertainties. These uncertainties can hinder long-term planning and investment in offshore drilling ventures, making it challenging for companies to accurately forecast returns on their investments.

Technological and Operational Challenges

Continued advancement into deeper and more challenging offshore environments presents technological and operational hurdles for drilling companies. Operating in extreme conditions such as ultra-deepwater sites demands sophisticated and costly equipment and technologies. The harsh marine environment, including high-pressure conditions and harsh weather, poses significant challenges to drilling operations, impacting equipment reliability and safety measures. Moreover, the complex geology of deepwater reservoirs requires specialized drilling techniques and tools, increasing operational complexities and costs. Overcoming these technological and operational challenges requires continuous innovation, substantial investment in research and development, and the expertise to adapt to evolving conditions.

Competitive Landscape and Cost Pressures

The competitive landscape within the offshore drilling market poses a challenge for companies, particularly concerning cost pressures. The industry faces intense competition among drilling contractors, service providers, and oil majors vying for lucrative contracts and projects. Companies often engage in price competition to secure contracts, leading to compressed profit margins. Additionally, the high capital expenditures required for exploration and drilling in offshore environments contribute to cost pressures. Balancing the need to maintain competitive pricing while ensuring profitability poses a significant challenge, especially in an environment where cost-efficiency and operational excellence are crucial for success. Companies must constantly optimize operational efficiencies and explore cost-effective technologies to remain competitive in the market.

Key Market Trends

Shift Towards Sustainable Offshore Operations

A notable trend in the offshore drilling market is the increasing emphasis on sustainability and environmentally conscious practices. Amid growing concerns about climate change and environmental impacts, there's a notable shift towards integrating sustainable practices into offshore drilling operations. Companies are leveraging advanced technologies and innovative techniques to minimize environmental footprints, reduce emissions, and mitigate risks to marine ecosystems. This trend encompasses the adoption of cleaner energy sources, such as renewable energy solutions for offshore platforms, including wind and solar power. Moreover, there's a heightened focus on employing eco-friendly drilling fluids and implementing stringent waste management protocols to minimize environmental impact, aligning with global sustainability goals and meeting regulatory requirements.

Digitalization and Adoption of Advanced Technologies

The offshore drilling industry is experiencing a rapid transformation driven by digitalization and the adoption of cutting-edge technologies. Companies are increasingly leveraging data analytics, artificial intelligence, and automation to optimize drilling operations, enhance safety measures, and improve overall efficiency. Real-time monitoring systems, predictive maintenance algorithms, and digital twin simulations are revolutionizing offshore drilling, enabling better decision-making and precise operational control. Furthermore, the integration of Internet of Things (IoT) devices and sensor

technologies on rigs and equipment enables remote monitoring and data-driven insights, empowering companies to optimize performance and reduce downtime significantly.

Focus on Cost Optimization and Operational Efficiency

In a challenging market environment marked by fluctuating oil prices and cost pressures, there's a prevailing trend among offshore drilling companies to prioritize cost optimization and operational efficiency. Companies are adopting strategies aimed at streamlining operations, reducing capital expenditures, and optimizing drilling processes to enhance overall efficiency. This includes implementing innovative contracting models, standardizing equipment, and exploring collaborative partnerships to share resources and reduce costs. Additionally, there's a concerted effort to enhance rig utilization rates and minimize downtime through improved maintenance practices and advanced technology deployment, enabling companies to achieve better cost-effectiveness in their operations.

Expansion into New Offshore Regions and Frontiers

The offshore drilling market is witnessing a trend of expanding exploration and production activities into new offshore regions and frontiers. As traditional reserves mature, companies are venturing into previously untapped areas, including frontier basins and regions with complex geological structures. This trend involves exploring deeper waters and challenging environments such as Arctic and remote offshore locations, where technological advancements and improved capabilities enable access to potentially lucrative reserves. Additionally, technological innovations in seismic imaging and reservoir characterization contribute to identifying and unlocking resources in these new frontiers, presenting significant opportunities for market expansion.

Rise of Integrated Service Offerings and Diversification

Another notable trend in the offshore drilling market is the evolution of integrated service offerings and diversification strategies among industry players. Companies are increasingly shifting towards offering comprehensive solutions beyond traditional drilling services. Integrated service models encompass drilling, engineering, procurement, and construction services, providing clients with end-to-end solutions for offshore projects. Moreover, there's a trend of diversification into alternative energy segments, including offshore wind and renewable energy projects, enabling companies to capitalize on the growing demand for clean energy while leveraging their offshore expertise and

infrastructure. This trend reflects a strategic approach to adapt to changing market dynamics and diversify revenue streams beyond conventional oil and gas drilling activities.

Segmental Insights

Type Insights

The various types in the offshore drilling market—Jackups, Semisubmersibles, Drill Ships, and other specialized types—the Jackups segment emerged as the dominant force and is anticipated to sustain its supremacy through the forecast period. Jackup rigs, known for their versatility and cost-efficiency, claimed the leading position due to several factors. These rigs are widely utilized across diverse offshore environments, including shallow waters, and are favored for their ability to be towed to different locations swiftly. The Jackup segment's dominance stems from its adaptability to varying water depths, making it suitable for a wide range of offshore drilling projects. Additionally, technological advancements have enhanced the capabilities of Jackup rigs, enabling them to operate in deeper waters and harsher environmental conditions, further solidifying their market position. Their relatively lower operational costs compared to other types, such as Semisubmersibles and Drill Ships, contribute significantly to their continued dominance in the market. Moreover, the ongoing global shift towards sustainable practices and eco-friendly operations has also favored Jackup rigs due to their potential for incorporating renewable energy solutions and adhering to stringent environmental regulations. With ongoing innovations aimed at improving their efficiency, safety features, and adaptability to evolving market demands, the Jackups segment is poised to maintain its dominant position in the global offshore drilling market throughout the forecast period, sustaining its appeal among industry stakeholders and operators seeking cost-effective and versatile solutions for offshore drilling operations.

Depth Insights

The Deepwater and Ultra-deepwater segment emerged as the dominant force in the Global Offshore Drilling Market and is anticipated to maintain its dominance through the forecast period. This segment's prominence is attributed to several factors driving the exploration and production activities in deeper offshore regions. Deepwater and Ultra-deepwater drilling have gained traction due to technological advancements that have significantly enhanced the industry's capabilities to access and extract resources from these challenging environments. The appeal lies in the substantial reserves present in these deeper waters, offering the potential for sizable discoveries that can meet the

escalating global energy demand. Moreover, advancements in drilling technologies, including improved rig designs, sophisticated exploration techniques, and subsea equipment, have bolstered the feasibility and efficiency of operations in Deepwater and Ultra-deepwater regions. Despite the higher operational complexities and costs associated with these depths, the allure of untapped reserves and the continuous evolution of technologies to mitigate challenges make this segment a dominant and attractive area for offshore drilling. As the industry continues to invest in innovation and efficiency measures specifically tailored for deepwater exploration and production, the Deepwater and Ultra-deepwater segment is expected to maintain its lead in the global offshore drilling market, catering to the growing demand for energy resources from these substantial offshore reserves.

Regional Insights

Middle East and Africa (MEA) region emerged as the dominant force in the Global Offshore Drilling Market and is anticipated to sustain its dominance through the forecast period. The prominence of the MENA (Middle East and North Africa) region in offshore drilling activities stems from various factors that underscore its significance in the global energy landscape. Rich in offshore reserves, particularly within the Persian Gulf, the MENA region holds substantial oil and gas reserves, making it a focal point for exploration and production activities. This abundance has attracted significant investments from both domestic and international oil companies, further enhancing the region's standing in the offshore drilling market. Moreover, the MENA region benefits from geopolitical stability, favorable regulatory frameworks, and well-established infrastructure, which collectively bolster its position as a key player in offshore drilling. These factors create an enabling environment for exploration and production activities, fostering continued growth and development in the sector. Additionally, technological advancements in drilling techniques and equipment have played a crucial role in enabling efficient extraction from offshore fields in the region. This continuous innovation enhances operational efficiency and contributes to the region's competitiveness in the global offshore drilling market. The MENA region's strategic position as a major supplier of oil and gas to global markets further reinforces its dominance in offshore drilling. Efforts to diversify its energy portfolio and optimize production from offshore reserves underscore its commitment to maintaining its leadership position in the sector. Continued investments in exploration and production endeavors, coupled with advancements in drilling technologies tailored to the region's specific geological conditions, further solidify the MENA region's standing as a dominant force in offshore drilling. As such, the region is poised to maintain its prominence in the global offshore drilling market throughout the forecast period, contributing significantly to

the global energy supply.

Key Market Players

Transocean Ltd.

Seadrill Limited

Noble Corporation

Diamond Offshore Drilling, Inc.

EnscoRowan (now Valaris plc)

Pacific Drilling Company LLC

Shelf Drilling Holdings Ltd

Maersk Drilling Holdings A/S

Borr Drilling Limited

Vantage Drilling International

Report Scope:

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

Offshore Drilling Market, By Type:

Jackups

Semisubmersible

Drill Ships

Other Types

Offshore Drilling Market, By Depth:

Shallow Water

Deepwater

Ultra-deepwater

Offshore Drilling Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Offshore Drilling Market.

Available Customizations:

Global Offshore Drilling 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL OFFSHORE DRILLING MARKET

5. VOICE OF CUSTOMER

6. GLOBAL OFFSHORE DRILLING MARKET OVERVIEW

7. GLOBAL OFFSHORE DRILLING MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast

- 7.2.1. By Type (Jackups, Semisubmersible, Drill Ships, and Other Types)
- 7.2.2. By Depth (Shallow Water and Deepwater and Ultra-deepwater)
- 7.2.3. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.3. By Company (2023)
- 7.4. Market Map

8. NORTH AMERICA OFFSHORE DRILLING MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Depth
 - 8.2.3. By Country
- 8.3. North America: Country Analysis
 - 8.3.1. United States Offshore Drilling Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By Depth
 - 8.3.2. Canada Offshore Drilling Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By Depth
 - 8.3.3. Mexico Offshore Drilling Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By Depth

9. EUROPE OFFSHORE DRILLING MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Depth

9.2.3. By Country

9.3. Europe: Country Analysis

9.3.1. Germany Offshore Drilling Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Type

9.3.1.2.2. By Depth

9.3.2. France Offshore Drilling Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Type

9.3.2.2.2. By Depth

9.3.3. United Kingdom Offshore Drilling Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Type

9.3.3.2.2. By Depth

9.3.4. Italy Offshore Drilling Market Outlook

9.3.4.1. Market Size & Forecast

9.3.4.1.1. By Value

9.3.4.2. Market Share & Forecast

9.3.4.2.1. By Type

9.3.4.2.2. By Depth

9.3.5. Spain Offshore Drilling Market Outlook

9.3.5.1. Market Size & Forecast

9.3.5.1.1. By Value

9.3.5.2. Market Share & Forecast

9.3.5.2.1. By Type

9.3.5.2.2. By Depth

9.3.6. Belgium Offshore Drilling Market Outlook

9.3.6.1. Market Size & Forecast

9.3.6.1.1. By Value

9.3.6.2. Market Share & Forecast

9.3.6.2.1. By Type

9.3.6.2.2. By Depth

10. SOUTH AMERICA OFFSHORE DRILLING MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Depth

10.2.3. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Offshore Drilling Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Type

10.3.1.2.2. By Depth

10.3.2. Colombia Offshore Drilling Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Type

10.3.2.2.2. By Depth

10.3.3. Argentina Offshore Drilling Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Type

10.3.3.2.2. By Depth

10.3.4. Chile Offshore Drilling Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

10.3.4.2.1. By Type

10.3.4.2.2. By Depth

10.3.5. Peru Offshore Drilling Market Outlook

10.3.5.1. Market Size & Forecast

10.3.5.1.1. By Value

- 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Type
 - 10.3.5.2.2. By Depth

11. MIDDLE EAST & AFRICA OFFSHORE DRILLING MARKET OUTLOOK

- 11.1. Market Size & Forecast
 - 11.1.1. By Value
- 11.2. Market Share & Forecast
 - 11.2.1. By Type
 - 11.2.2. By Depth
 - 11.2.3. By Country
- 11.3. Middle East & Africa: Country Analysis
 - 11.3.1. Saudi Arabia Offshore Drilling Market Outlook
 - 11.3.1.1. Market Size & Forecast
 - 11.3.1.1.1. By Value
 - 11.3.1.2. Market Share & Forecast
 - 11.3.1.2.1. By Type
 - 11.3.1.2.2. By Depth
 - 11.3.2. UAE Offshore Drilling Market Outlook
 - 11.3.2.1. Market Size & Forecast
 - 11.3.2.1.1. By Value
 - 11.3.2.2. Market Share & Forecast
 - 11.3.2.2.1. By Type
 - 11.3.2.2.2. By Depth
 - 11.3.3. South Africa Offshore Drilling Market Outlook
 - 11.3.3.1. Market Size & Forecast
 - 11.3.3.1.1. By Value
 - 11.3.3.2. Market Share & Forecast
 - 11.3.3.2.1. By Type
 - 11.3.3.2.2. By Depth
 - 11.3.4. Turkey Offshore Drilling Market Outlook
 - 11.3.4.1. Market Size & Forecast
 - 11.3.4.1.1. By Value
 - 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Type
 - 11.3.4.2.2. By Depth
 - 11.3.5. Israel Offshore Drilling Market Outlook
 - 11.3.5.1. Market Size & Forecast

- 11.3.5.1.1. By Value
- 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Type
 - 11.3.5.2.2. By Depth

12. ASIA PACIFIC OFFSHORE DRILLING MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Type
 - 12.2.2. By Depth
 - 12.2.3. By Country
- 12.3. Asia-Pacific: Country Analysis
 - 12.3.1. China Offshore Drilling Market Outlook
 - 12.3.1.1. Market Size & Forecast
 - 12.3.1.1.1. By Value
 - 12.3.1.2. Market Share & Forecast
 - 12.3.1.2.1. By Type
 - 12.3.1.2.2. By Depth
 - 12.3.2. India Offshore Drilling Market Outlook
 - 12.3.2.1. Market Size & Forecast
 - 12.3.2.1.1. By Value
 - 12.3.2.2. Market Share & Forecast
 - 12.3.2.2.1. By Type
 - 12.3.2.2.2. By Depth
 - 12.3.3. Japan Offshore Drilling Market Outlook
 - 12.3.3.1. Market Size & Forecast
 - 12.3.3.1.1. By Value
 - 12.3.3.2. Market Share & Forecast
 - 12.3.3.2.1. By Type
 - 12.3.3.2.2. By Depth
 - 12.3.4. South Korea Offshore Drilling Market Outlook
 - 12.3.4.1. Market Size & Forecast
 - 12.3.4.1.1. By Value
 - 12.3.4.2. Market Share & Forecast
 - 12.3.4.2.1. By Type
 - 12.3.4.2.2. By Depth
 - 12.3.5. Australia Offshore Drilling Market Outlook

- 12.3.5.1. Market Size & Forecast
 - 12.3.5.1.1. By Value
- 12.3.5.2. Market Share & Forecast
 - 12.3.5.2.1. By Type
 - 12.3.5.2.2. By Depth
- 12.3.6. Indonesia Offshore Drilling Market Outlook
 - 12.3.6.1. Market Size & Forecast
 - 12.3.6.1.1. By Value
 - 12.3.6.2. Market Share & Forecast
 - 12.3.6.2.1. By Type
 - 12.3.6.2.2. By Depth
- 12.3.7. Vietnam Offshore Drilling Market Outlook
 - 12.3.7.1. Market Size & Forecast
 - 12.3.7.1.1. By Value
 - 12.3.7.2. Market Share & Forecast
 - 12.3.7.2.1. By Type
 - 12.3.7.2.2. By Depth

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Transocean Ltd.
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel/Key Contact Person
 - 15.1.5. Key Product/Services Offered
- 15.2. Seadrill Limited
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments
 - 15.2.4. Key Personnel/Key Contact Person
 - 15.2.5. Key Product/Services Offered

- 15.3. Noble Corporation
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. Diamond Offshore Drilling, Inc.
 - 15.4.1. Business Overview
 - 15.4.2. Key Revenue and Financials
 - 15.4.3. Recent Developments
 - 15.4.4. Key Personnel/Key Contact Person
 - 15.4.5. Key Product/Services Offered
- 15.5. Enscorowan (now Valaris plc)
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. Pacific Drilling
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. Shelf Drilling
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. Maersk Drilling
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Borr Drilling Limited
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials

15.9.3. Recent Developments

15.9.4. Key Personnel/Key Contact Person

15.9.5. Key Product/Services Offered

15.10. Vantage Drilling International

15.10.1. Business Overview

15.10.2. Key Revenue and Financials

15.10.3. Recent Developments

15.10.4. Key Personnel/Key Contact Person

15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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