

# **Oil & Gas Digital Rock Analysis Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Type (Conventional and Unconventional), By Region, and By Competition 2019-2029**

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## **Abstracts**

Global Oil & Gas Digital Rock Analysis Market was valued at USD 146.9 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.04% through 2029. Over the long term, factors such as an increase in the complexity of production from unconventional reservoirs to maximize production are expected to drive the market during the forecast period.

On the flip side, the high cost of producing high-resolution rock structures is expected to restrain the market. However, developing advanced imaging techniques for logging activities is expected to create significant opportunities for market studies during the forecasted period.

### **Key Market Drivers**

The global Oil & Gas Digital Rock Analysis market is propelled by a multifaceted array of drivers, shaping its trajectory and influencing the strategies of industry participants. These drivers collectively underscore the industry's commitment to technological innovation, cost efficiency, and sustainable resource extraction. One of the primary drivers steering the growth of the digital rock analysis market is the relentless pursuit of enhanced reservoir characterization. As oil and gas companies navigate increasingly complex geological formations, the need for comprehensive insights into reservoir rocks becomes paramount. Digital rock analysis provides a sophisticated toolset for scrutinizing the intricate properties of these formations, enabling a more profound

understanding of their characteristics. This, in turn, empowers decision-makers to formulate more effective exploration and production strategies.

Technological advancements stand as a cornerstone driver for the Oil & Gas Digital Rock Analysis market. The continuous evolution of digital imaging, computational capabilities, and simulation techniques enhances the precision and efficiency of rock analysis. These advancements contribute to the development of more sophisticated models, allowing for realistic simulations of reservoir behavior. The industry's reliance on cutting-edge technology positions digital rock analysis as an invaluable component in the pursuit of optimal resource extraction. Cost reduction and operational efficiency remain pivotal considerations for oil and gas companies. In this context, digital rock analysis emerges as a key enabler. By providing detailed insights into reservoir properties, this technology aids in optimizing drilling and production processes. The resultant improvements in efficiency not only enhance the economic viability of projects but also align with the industry's broader efforts to streamline operations in a cost-conscious environment.

The growing complexity of reservoirs, particularly with the rise of unconventional resources such as shale and tight formations, drives the adoption of advanced analysis tools. Digital rock analysis is uniquely positioned to unravel the intricacies of these challenging reservoirs, offering a nuanced understanding of pore structures and fluid dynamics. As the industry ventures into increasingly complex geological environments, the demand for digital rock analysis solutions is expected to rise. The emphasis on Enhanced Oil Recovery (EOR) further fuels the demand for digital rock analysis. As conventional oil reserves decline, there is a concerted effort to extract more hydrocarbons from existing fields. Digital rock analysis proves instrumental in designing and implementing effective EOR strategies by providing insights into reservoir characteristics and fluid interactions. This driver aligns with the industry's long-term sustainability goals and the efficient utilization of existing resources.

Environmental considerations and regulatory pressures exert a growing influence on the oil and gas sector. Stricter regulations and heightened environmental awareness necessitate the adoption of technologies that minimize the industry's ecological footprint. Digital rock analysis contributes to responsible resource management by optimizing extraction processes and minimizing environmental impact. This alignment with sustainability objectives positions digital rock analysis as a valuable asset for companies seeking to balance economic interests with environmental stewardship. Collaboration and partnerships form a crucial driver for the digital rock analysis market. The complexity of the challenges faced by the industry necessitates a collaborative

approach. Joint ventures and partnerships between oil and gas companies, technology providers, and research institutions foster the development and adoption of digital rock analysis solutions. This collaborative ecosystem facilitates the sharing of expertise, resources, and best practices, contributing to the continuous evolution of technology.

In the era of big data, the oil and gas industry's increasing reliance on data-driven decision-making processes amplifies the importance of digital rock analysis. Analyzing vast datasets derived from rock samples enables a more informed approach to reservoir development and production strategies. The integration of data-driven insights positions digital rock analysis as an indispensable tool in the industry's quest for operational excellence and strategic decision-making. In conclusion, the global Oil & Gas Digital Rock Analysis market is propelled by a confluence of factors that underscore the industry's commitment to technological innovation, cost efficiency, and environmental responsibility. As the industry navigates evolving challenges and explores new frontiers, digital rock analysis stands as a pivotal technology shaping the future of oil and gas exploration and production.

### Key Market Challenges

The Global Oil & Gas Digital Rock Analysis market, while experiencing significant growth, is not without its share of challenges that shape the landscape and influence the strategies of industry stakeholders. These challenges underscore the complexities inherent in the adoption and implementation of digital rock analysis technologies, posing hurdles to widespread integration and hindering the realization of its full potential. One of the key challenges faced by the industry is the high upfront costs associated with implementing digital rock analysis solutions. The acquisition of cutting-edge technologies, specialized software, and the expertise required for their deployment represents a substantial financial investment for oil and gas companies. This initial barrier to entry may dissuade some organizations, particularly smaller players with limited financial resources, from fully embracing digital rock analysis. Overcoming this challenge necessitates a strategic approach to investment decisions, where companies weigh the long-term benefits against the upfront costs.

Interoperability and standardization issues present another formidable challenge for the oil and gas digital rock analysis market. The industry encompasses a diverse range of technologies, data formats, and protocols. The lack of standardized practices hampers seamless integration and collaboration between different software and hardware solutions. Achieving interoperability is crucial for creating a cohesive digital ecosystem that enables the efficient exchange of data and insights. Industry-wide initiatives and

collaboration are essential to developing and implementing standardized frameworks that enhance interoperability. The complexity of geological formations and the heterogeneity of reservoir rocks pose significant challenges to accurate digital rock analysis. Each reservoir presents a unique set of characteristics, and the effectiveness of digital rock analysis hinges on the ability to capture this diversity. Variations in mineral composition, pore structures, and fluid behaviors require sophisticated algorithms and models that can adapt to different geological scenarios. Developing universally applicable solutions that can cater to the intricacies of diverse reservoirs remains a persistent challenge for the industry.

Data quality and accessibility are critical challenges that impede the seamless application of digital rock analysis. The reliability of insights derived from digital rock analysis is contingent upon the quality of input data. Obtaining high-quality rock samples and accurate laboratory measurements is essential for meaningful analysis. Additionally, data accessibility can be a challenge, especially when dealing with legacy data or remote exploration sites. Ensuring a consistent and reliable data stream is crucial for the efficacy of digital rock analysis tools.

Addressing the skills gap in the industry represents a significant challenge for the widespread adoption of digital rock analysis. The implementation of advanced technologies requires a workforce with specialized skills in data science, geophysics, and reservoir engineering. The shortage of professionals well-versed in these domains can hinder the effective utilization of digital rock analysis tools. Investment in training and educational programs, coupled with efforts to attract and retain talent with expertise in relevant fields, is essential to overcoming this challenge.

Cybersecurity concerns emerge as a pressing challenge in the digital age of the oil and gas industry. As digital rock analysis relies on interconnected systems and data exchange, the vulnerability to cyber threats increases. Safeguarding sensitive geological and operational data from cyberattacks becomes imperative to maintain the integrity and confidentiality of critical information. Industry players must invest in robust cybersecurity measures and stay abreast of evolving threats to ensure the secure deployment of digital rock analysis technologies. In conclusion, the Global Oil & Gas Digital Rock Analysis market faces a range of challenges that span financial, technical, and organizational domains. Successfully navigating these challenges requires a collaborative industry approach, with a focus on innovation, standardization, and skill development. Overcoming these hurdles is essential for unlocking the full potential of digital rock analysis in enhancing reservoir characterization, optimizing operations, and contributing to sustainable resource extraction in the oil and gas sector.

## Key Market Trends

The Global Oil & Gas Digital Rock Analysis market is witnessing several key trends that are reshaping the industry landscape and influencing the strategies of stakeholders. These trends reflect the industry's ongoing commitment to technological innovation, sustainability, and operational efficiency. One prominent trend in the Oil & Gas Digital Rock Analysis market is the increasing integration of artificial intelligence (AI) and machine learning (ML) algorithms into analysis tools. The complexity of reservoirs and the vast amount of data generated demand advanced computational techniques to derive meaningful insights. AI and ML empower digital rock analysis tools to process large datasets, identify patterns, and optimize decision-making processes. These technologies enhance the accuracy and efficiency of rock characterization, allowing for more precise reservoir modeling and improved predictions of fluid behavior.

The industry is experiencing a growing emphasis on real-time analysis and monitoring capabilities. Traditional laboratory-based rock analysis methods are often time-consuming, leading to delays in decision-making processes. Real-time digital rock analysis solutions enable continuous monitoring of reservoir conditions and provide timely insights for agile decision-making. This trend aligns with the industry's pursuit of operational agility and responsiveness to dynamic geological and market conditions. Digital twins are gaining prominence in the Oil & Gas Digital Rock Analysis market. A digital twin is a virtual representation of a physical asset or process, and in the context of oil and gas, it involves creating a detailed digital replica of a reservoir. Digital twins enable continuous monitoring and simulation of reservoir conditions, allowing operators to optimize production strategies and predict reservoir behavior with greater accuracy. This trend reflects a broader shift toward digitizing the entire value chain in the oil and gas sector.

The market is witnessing an increased focus on sustainability and environmental responsibility, leading to the development of eco-friendly digital rock analysis solutions. As the industry faces heightened scrutiny and evolving regulatory frameworks, there is a growing need for technologies that align with sustainable practices. Digital rock analysis contributes to responsible resource management by optimizing extraction processes, reducing environmental impact, and supporting energy transition efforts. Collaboration and partnerships between technology providers, oil and gas companies, and research institutions are on the rise. The complexity of digital rock analysis technologies necessitates a collaborative approach to drive innovation and address industry challenges collectively. Joint ventures and partnerships facilitate the sharing of



expertise, resources, and best practices, contributing to the development of more robust and versatile digital rock analysis solutions.

Another notable trend is the increasing use of 3D visualization techniques in digital rock analysis. Visualizing reservoir characteristics in three dimensions enhances the interpretation of complex geological features, pore structures, and fluid movements. This trend is particularly valuable in conveying insights to stakeholders and decision-makers, fostering a better understanding of reservoir dynamics and aiding in the development of effective exploration and production strategies.

The market is also witnessing a rise in cloud-based solutions for digital rock analysis. Cloud computing offers scalability, flexibility, and accessibility, allowing companies to store and analyze vast amounts of data without the need for extensive on-premises infrastructure. Cloud-based solutions facilitate collaboration, data sharing, and remote access, contributing to more efficient and collaborative workflows in the oil and gas industry. In conclusion, the Global Oil & Gas Digital Rock Analysis market is undergoing a transformative phase marked by the integration of advanced technologies, a focus on real-time capabilities, and a commitment to sustainability. These trends reflect the industry's adaptability to technological innovations and its continuous efforts to optimize operations, enhance decision-making processes, and address evolving environmental and regulatory considerations.

## Segmental Insights

### Type Insights

Conventional segment will dominate the market in the forecast period. Oil and gas digital rock analysis integrates various scientific disciplines, including advanced microscopy, physics, geology, geochemistry, petrophysics, and petroleum engineering. Its primary objective is to comprehensively understand the microscopic structure of reservoir rocks at the pore scale. Exploration and production (E&P) operators can mitigate risks, enhance hydrocarbon production, and optimize well recovery by employing this approach. The advancements offered by digital rock analysis compared to traditional methods are anticipated to drive its growth in the market.

Conventional reservoirs have been the focus of oil and gas exploration and production for decades. As a result, there is a wealth of existing data and knowledge about conventional reservoirs. Digital rock analysis can enhance the understanding of conventional reservoirs, optimize production strategies, and improve recovery rates.

Moreover, many conventional reservoirs are mature, meaning they have been producing for an extended period. With the help of digital rock analysis, operators can gain insights into reservoir behavior, assess remaining reserves, and optimize field development and management strategies to maximize production from these mature fields.

According to the United States Energy Information Administration, Short-Term Energy Outlook, June 2023, global crude oil production is set to increase by close to 3% annual growth by 2024. Furthermore, global crude oil production increased by 4.48% in 2022 compared to the previous year, recording 100,024 mb/d. Increasing exploration and production activities consequently increase the demand for digital rock analysis.

## Regional Insights

North America emerged as the dominating region in 2023, holding the largest market share. Historically, North America, particularly the United States, has been a leader in adopting advanced technologies in the oil and gas industry.

North America has a strong presence of technology providers, research institutions, and universities that contribute to digital rock analysis technique advancements. These advancements help drive innovation, improve imaging technologies, and enhance regional data analysis methods. Moreover, North America has significant oil and gas reserves and a well-established industry. The region's exploration and production activities in conventional and unconventional reservoirs create a strong demand for advanced reservoir characterization techniques like digital rock analysis. According to the United States Department of Energy, natural gas production in the United States increased by more than 4% between 2021 and 2022. In 2022 total natural gas production in the country was 43,384,575 million cubic feet compared to 41,666,118 million cubic feet in 2021, signifying the region's well-established oil and gas industry.

Additionally, North America has been at the forefront of the shale revolution, particularly in the United States, with shale gas development and tight oil resources. Digital rock analysis is crucial in understanding the complex pore structures and fluid behavior in these unconventional reservoirs, making it valuable for optimizing production and recovery in these regions. Therefore, per the above points, the North American region is expected to dominate the Oil and Gas Digital Rock Analysis Market during the forecasted period.

## Key Market Players

Schlumberger Limited

Halliburton Company

Thermo Fisher Scientific Inc.

Intertek Group PLC

Core Laboratories N.V.

Zeiss International

FREDsense Technologies Corp.

Petricore Norway AS

#### Report Scope:

In this report, the Global Oil & Gas Digital Rock Analysis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Oil & Gas Digital Rock Analysis Market, By Type:

Conventional

Unconventional

#### Oil & Gas Digital Rock Analysis Market, By Region:

North America

United States

Canada

Mexico



Europe

France

United Kingdom

Italy

Germany

Spain

Netherlands

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Thailand

Malaysia

South America

Brazil

Argentina

Colombia

Chile

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Oil & Gas Digital Rock Analysis Market.

## Available Customizations:

Global Oil & Gas Digital Rock Analysis 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 OIL & GAS DIGITAL ROCK ANALYSIS MARKET**

### **5. VOICE OF CUSTOMER**

### **6. GLOBAL OIL & GAS DIGITAL ROCK ANALYSIS MARKET OVERVIEW**

## **7. GLOBAL OIL & GAS DIGITAL ROCK ANALYSIS MARKET OUTLOOK**

### **7.1. Market Size & Forecast**

#### **7.1.1. By Value**

### **7.2. Market Share & Forecast**

#### **7.2.1. By Type (Conventional, Unconventional)**

#### **7.2.2. By Region**

### **7.3. By Company (2023)**

### **7.4. Market Map**

## **8. NORTH AMERICA OIL & GAS DIGITAL ROCK ANALYSIS 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 Country**

### **8.3. North America: Country Analysis**

#### **8.3.1. United States Oil & Gas Digital Rock Analysis 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**

#### **8.3.2. Canada Oil & Gas Digital Rock Analysis 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**

#### **8.3.3. Mexico Oil & Gas Digital Rock Analysis 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**

## **9. EUROPE OIL & GAS DIGITAL ROCK ANALYSIS 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 Country

### 9.3. Europe: Country Analysis

9.3.1. Germany Oil & Gas Digital Rock Analysis 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

9.3.2. France Oil & Gas Digital Rock Analysis 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

9.3.3. United Kingdom Oil & Gas Digital Rock Analysis 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

9.3.4. Italy Oil & Gas Digital Rock Analysis 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

9.3.5. Spain Oil & Gas Digital Rock Analysis 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

9.3.6. Netherlands Oil & Gas Digital Rock Analysis 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

9.3.7. Belgium Oil & Gas Digital Rock Analysis Market Outlook

9.3.7.1. Market Size & Forecast

9.3.7.1.1. By Value

9.3.7.2. Market Share & Forecast

9.3.7.2.1. By Type

## **10. SOUTH AMERICA OIL & GAS DIGITAL ROCK ANALYSIS 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 Country

### 10.3. South America: Country Analysis

#### 10.3.1. Brazil Oil & Gas Digital Rock Analysis 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

#### 10.3.2. Colombia Oil & Gas Digital Rock Analysis 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

#### 10.3.3. Argentina Oil & Gas Digital Rock Analysis 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

#### 10.3.4. Chile Oil & Gas Digital Rock Analysis 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

## **11. MIDDLE EAST & AFRICA OIL & GAS DIGITAL ROCK ANALYSIS 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 Country

### 11.3. Middle East & Africa: Country Analysis

#### 11.3.1. Saudi Arabia Oil & Gas Digital Rock Analysis 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
- 11.3.2. UAE Oil & Gas Digital Rock Analysis 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
- 11.3.3. South Africa Oil & Gas Digital Rock Analysis 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
- 11.3.4. Turkey Oil & Gas Digital Rock Analysis 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

## **12. ASIA PACIFIC OIL & GAS DIGITAL ROCK ANALYSIS 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 Country
- 12.3. Asia-Pacific: Country Analysis
  - 12.3.1. China Oil & Gas Digital Rock Analysis 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
  - 12.3.2. India Oil & Gas Digital Rock Analysis 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
  - 12.3.3. Japan Oil & Gas Digital Rock Analysis 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
- 12.3.4. South Korea Oil & Gas Digital Rock Analysis 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
- 12.3.5. Australia Oil & Gas Digital Rock Analysis 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
- 12.3.6. Thailand Oil & Gas Digital Rock Analysis 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
- 12.3.7. Malaysia Oil & Gas Digital Rock Analysis 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

## **13. MARKET DYNAMICS**

- 13.1. Drivers
- 13.2. Challenges

## **14. MARKET TRENDS AND DEVELOPMENTS**

## **15. COMPANY PROFILES**

- 15.1. Schlumberger Limited
  - 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. Halliburton Company
  - 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. Thermo Fisher Scientific Inc.
  - 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. Intertek Group PLC
  - 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. Core Laboratories N.V.
  - 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. Zeiss International
  - 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. FREDsense Technologies Corp.
  - 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. Petricore Norway AS

- 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

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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