

Oil and Gas Analytics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Service (Professional, Cloud, Integration), By Deployment Mode (On-premises, Cloud), By Application (Upstream (Exploration and Drilling, Field Surveillance and Monitoring, Production Planning and Forecasting, Equipment Maintenance Management, Asset Performance, Workforce Management), Midstream (Pipeline SCADA, Fleet, Storage Optimization), Downstream (Commodity Trading, Demand Forecasting, Pricing, Refining)), By Region, and By Competition 2019-2029

<https://marketpublishers.com/r/O371DE9724E5EN.html>

Date: January 2024

Pages: 185

Price: US\$ 4,900.00 (Single User License)

ID: O371DE9724E5EN

Abstracts

Global Oil and Gas Analytics Market was valued at USD 12.38 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 23.44% through 2029. The oil and gas industry is undergoing a digital transformation, embracing Industry 4.0 principles to enhance operational efficiency and decision-making. Advanced analytics solutions enable companies to harness the power of real-time data, optimizing exploration and production processes, minimizing downtime, and improving overall asset performance. Predictive maintenance has emerged as a critical trend within the oil and gas sector. Analytics tools analyze equipment performance data to predict potential failures before they occur, allowing for proactive maintenance and minimizing downtime. This approach not only reduces operational costs but also enhances safety and reliability. With the increasing volume and variety of data

generated in the oil and gas industry, integrating and visualizing this data becomes crucial. Analytics platforms that facilitate seamless data integration and provide intuitive visualizations empower decision-makers with actionable insights, enabling them to make informed choices in real time. In the upstream segment, advanced reservoir characterization through analytics is gaining prominence. By analyzing geological and geophysical data, companies can optimize reservoir management, improve drilling efficiency, and maximize hydrocarbon recovery.

Key Market Drivers

The Global oil and gas analytics market is predicted to proliferate during the forecast period due to the rise in demand for analytics, rapid growth in digitalization and increasing adoption of advanced technologies by enterprises to meet the need for growing oil & gas business. The process of identifying, evaluating, and presenting significant trends in data is known as analytics. The application of analytics in the oilfields allows for the identification of patterns among hundreds of variables that are constantly changing by utilising many of the same statistical techniques used in other sectors. It gives businesses the opportunity to understand data spread across several positions while enhancing performance, dependability, and scalability. Additionally, oil and gas analytics helps increasing the emphasis on process digitalization. Businesses are increasingly utilising oil and gas analytics solutions to control traffic and monitor the performance, increased production and oil recovery rates, better operations, innovation in exploration. Numerous innovations carried out in cloud computing, machine learning and artificial intelligence are expected to enhance the specifications of analytics. This, in turn, is expected to drive market growth during the forecast period. Furthermore, the market size, measured by revenue, of the US Oil Drilling & Gas Extraction industry is USD 737.3 billion in 2023. According to studies, the United States presently generates 90% of its domestic natural gas supply and 75% of its crude oil supply. By the year 2021, it was turning out about eleven million barrels of crude oil daily and roughly 100 billion cubic feet of petrol daily.

In the last few years, the market for oil and gas analytics has experienced rapid expansion. Unconventional oil and gas production is increasing as a result of technological development and rising oil demand. Organizations are additionally growing more in dire require unstructured data management simplification, and consumers are becoming more interested in businesses that tend to be flexible and responsive. This can be related to the increasing demand of people and companies for cloud-based solutions and visibility support within the company as distant servers hosted on servers has grown greater in recent years. Additionally, increased demand

for predictive analytics and real-time visualisation analytics will expected cause a significant demand in the future. Furthermore, as companies enable crucial applications through dependable and high-performance connections, oil and gas analytics are becoming more popular. Moreover, also give a competitive advantage when it comes to latency problems, enhancing application performance, and boosting workplace safety in difficult circumstances. Oil and gas analytics allow businesses to provide prompt services at lower rates.

Rise in Demand for Analytics in Oil & Gas Industry

The current surge of digital innovation, remote work, and cloud usage has increased the demand for oil and gas analytics with security, which has caused businesses to reevaluate their infrastructure and network architecture. Analytics such as big data analytics and advance analytics are becoming increasingly popular among organizations that are eager to embrace digital transformation. Companies are now looking forward to a data-driven strategy through a connected environment as the digital oilfield expands its roots. Oil and gas firms are increasingly looking for real-time actionable information for equipment performance improvement and future operational failure prediction, which is why oilfield analytics is gaining strength. As the requirement for connection increases, oil and gas analytics are assisting businesses in making financial savings and allowing a more flexible infrastructure by automating more and more network functions.

Moreover, real-time visualization, analyzing large data sets, high accuracy in drilling methods and efficient performance of machines can be gained with the adoption of big data analytics during the oil extraction process. Furthermore, the analytics helps reduce unstructured data, accelerate innovation, reduce risks, minimize the downtime, and reduce additional expense by makes it possible to immediately identify a security assault, manage the machinery breakdown or failure. Therefore, the rise in demand for analytics in the oil & gas industry is expected to grow the adoption of oil and gas analytics in the US market.

US Growing Oilfield Projects

In 2018, the United States overtook other countries as the world's largest producer of crude oil, and it held that position in 2019 and 2020. In 2020, it produced 15% of the world's crude oil. For instance, according to BP PLC, the Herschel Expansion project in the Gulf of Mexico was launched in February 2022. The creation of a new subsea production system is the project's first phase. The first well is anticipated to boost

platform annual gross output by an estimated 10,600 barrels of oil equivalent per day at its peak.

Additionally, in December 2021, ConocoPhillips began oil production at its GMT-2 oil project in the National Petroleum Reserve-Alaska. At its peak, the project is anticipated to produce 30,000 b/d. The project's development expenses totaled USD 1.4 million. The upstream segment is therefore expected to experience significant expansion during the projection period because of the considerations. Owing to these factors the demand for oil & gas analytics is growing rapidly, due to which the market is expected to register a high CAGR in the forecast period.

Adoption of Cloud-Based Solutions in oil & Gas industry

Companies are incorporating cloud-based solutions into their infrastructure at an increasing pace due to the expanding benefits. A reliable cloud connection is being made available to the network due to technology. To satisfy the requirements, oil and gas analytics help to simplify secure site-to-cloud communications. The extensive use of cloud services connected via the Internet has increased analytical possibilities. Effective branch networking is becoming increasingly necessary as cloud services accessible over the internet gain popularity. Enterprises are constrained to rely more on cloud analytics than on private MPLS to deliver scalable cloud computing and the internet to support their cloud-based applications.

Additionally, more people are using the internet, which is leading to a growth in demand for cloud-based services. Due to the utilization of cloud-based services, which also facilitate faster network management, high application performance, improve bandwidth and network availability, and lower overhead costs, the oil and gas analytics sector has more possibilities. As a result, the rise of the US oil and gas analytics market during the projection period is being attributed to an increase in cloud-based solutions.

Key Market Challenges

Data Complexity and Integration:

The oil and gas industry generates massive volumes of data from various sources, including exploration, production, refining, and distribution. Integrating diverse datasets and ensuring their accuracy and consistency pose significant challenges. Inconsistent data quality can lead to flawed analytics outcomes, impacting decision-making processes.

Legacy Infrastructure:

Many companies in the oil and gas sector still rely on legacy systems and infrastructure that were not designed to handle the complexities of modern analytics. The integration of advanced analytics solutions with existing systems poses compatibility and scalability challenges, hindering the seamless implementation of data-driven insights.

Cybersecurity Threats:

With the increasing digitization of processes and the interconnectedness of systems, the oil and gas industry is more susceptible to cybersecurity threats. Protecting sensitive data and ensuring the security of critical infrastructure has become a paramount concern, requiring robust cybersecurity measures to mitigate potential risks.

Talent Shortage:

The rapid evolution of analytics technologies requires a skilled workforce capable of harnessing the full potential of these tools. However, the oil and gas industry is facing a shortage of data scientists, analysts, and professionals with expertise in advanced analytics. Bridging this talent gap is essential for the successful implementation of analytics solutions.

Cost Pressures and ROI Concerns:

While analytics solutions offer the promise of improved efficiency and cost savings, the initial investment and ongoing maintenance costs can be substantial. Oil and gas companies, especially in times of volatile oil prices, are cautious about investing in analytics without a clear demonstration of return on investment (ROI). Convincing stakeholders of the long-term benefits remains a significant challenge.

Regulatory Compliance:

The oil and gas industry operates in a highly regulated environment, with stringent compliance requirements. Implementing analytics solutions while adhering to these regulations adds complexity to the deployment process. Ensuring that analytics systems comply with data protection, environmental, and safety regulations is a critical challenge for companies in the sector.

Complex Geopolitical Landscape:

The oil and gas industry is deeply influenced by geopolitical events, trade tensions, and regulatory changes. Unpredictable geopolitical shifts can impact market dynamics, affecting investment decisions, supply chain management, and overall business strategies. Analytics systems must be adaptable to navigate these uncertainties.

Strategies for Resilience:

Investment in Data Quality and Integration:

Addressing data complexity requires a comprehensive approach. Companies should invest in data quality management tools and establish robust data integration processes. Implementing data governance frameworks ensures that data remains accurate, consistent, and reliable across the organization.

Modernization of Infrastructure:

To overcome challenges associated with legacy infrastructure, oil and gas companies need to prioritize the modernization of their IT systems. Adopting cloud-based solutions, upgrading software, and implementing scalable architectures enable seamless integration with advanced analytics tools, fostering a more agile and efficient ecosystem.

Enhanced Cybersecurity Measures:

Mitigating cybersecurity threats requires a proactive and multi-layered approach. Oil and gas companies should invest in state-of-the-art cybersecurity solutions, conduct regular risk assessments, and implement robust protocols for data protection. Employee training on cybersecurity best practices is also crucial to create a security-aware workforce.

Strategic Talent Development:

To address the talent shortage, companies should invest in training programs and partnerships with educational institutions to nurture a skilled workforce. Additionally, collaborating with analytics service providers and leveraging external expertise can fill immediate skill gaps while building internal capabilities over time.

Demonstrating ROI and Cost Management:

Demonstrating the return on investment is essential for gaining stakeholder confidence. Companies should conduct thorough pilot programs, showcasing the tangible benefits of analytics in specific use cases. Cost management strategies, such as phased implementations and resource optimization, can also alleviate concerns related to the financial implications of analytics adoption.

Adherence to Regulatory Compliance:

Companies should proactively align their analytics initiatives with regulatory requirements. This involves working closely with regulatory bodies, incorporating compliance checks into analytics processes, and regularly updating systems to accommodate evolving regulations. Transparency in compliance practices builds trust among stakeholders and regulatory authorities.

Scenario Planning for Geopolitical Uncertainties:

Given the unpredictable nature of geopolitical events, companies must integrate scenario planning into their analytics frameworks. Analyzing potential geopolitical impacts on supply chains, market dynamics, and investment decisions enables organizations to develop contingency plans, ensuring resilience in the face of geopolitical uncertainties.

The global oil and gas analytics market, while experiencing rapid growth and innovation, is not without its challenges. From data complexity to talent shortages and geopolitical uncertainties, the industry must navigate these obstacles to fully realize the potential of analytics. Strategic investments in data quality, infrastructure modernization, cybersecurity, talent development, and regulatory compliance are crucial for building resilience in the face of challenges. As the industry continues its digital transformation, addressing these hurdles will be key to unlocking the transformative power of analytics and ensuring a sustainable future for the global oil and gas sector.

Key Market Trends

The COVID-19 pandemic had a detrimental effect on the U.S. economy in recent years. Most of the industries experienced disruptions due to strict government lockdown measures that led to operational shutdowns. The pandemic enforced retailers to

cease their business operations for a certain period where, refineries operated at reduced capacity and declined its sales performance. However, the United States oil & gas analytics market has since rebounded, with full-capacity operations worldwide creating an ideal environment for oil and gas companies to invest in digitalization.

Oil and Gas Activities Trends

The oil & gas industry has witnessed a significant transformation toward digitization over the past few years, where analytics has gained a clear recognition. Cost reduction, workforce productivity, operational optimization and better decision-making are some of the key results offered by advanced analytical solutions. The companies are generating massive amounts of data through investments in big data platforms, IoT devices, and sensors that are required to be analyzed to draw meaningful insights. Moreover, increasing awareness about digital oilfields and the transformation of exploration, drilling, and transportation operations will propel U.S oil & gas analytics market. Furthermore, the continued oil production growth is being simultaneously reinforced with several other factors sustaining the investment potential in the oil & gas industry

Segmental Insights

Deployment Mode Insights

The cloud analytics services captured a dominant market share of more than 30% in 2022. The utilization of these services in the oil and gas industry assists companies in gathering and interpreting insights that support to make investment decisions and reducing costs. The industry's complex ecosystem, unstructured operations, and inefficient use of resources have influenced toward the oil & gas analytics market development. The cloud deployment model allows the industry to leverage analytical services without setting up digital infrastructure, resulting in cost-efficient operations. The U.S. held a 24% of the global oil & gas analytics industry share in 2022. Ongoing investments in digitalization tools in line with deployment of highly efficient technology systems by several companies will bolster the product penetration in the market. Increasing espousal of analytical solutions to boost cost-effectiveness and labor productivity coupled with rising capital expenditure in the O&G industry will positively influence the market growth.

The hosted segment held a striking market value of over USD 800 billion in 2022. The utilization of big data has led to better management of assets, operations, manufacturing, and worker safety. In recent years, the industry has experienced a

notable shift toward the adoption of hosted services for collecting real-time data at a reduced cost, thereby enhancing production efficiency. Key players in oil & gas analytics market are investing heavily in research and development to increase digitalization in their operations, which is expected to lead to production methods and optimal exploration. The industry is often confronted with supply-demand imbalances due to the absence of proper analytical tools to aid demand forecasting. The oil & gas analytics industry is anticipated to witness a favorable growth as companies strive to achieve reduced maintenance and operational expenses. The sector has witnessed a rise in the utilization of analytical services owing to strict government regulations and mandates that emphasize safety during upstream, midstream, and downstream operations. Additionally, escalating private and public investments in digitalization and analytical tools to enhancing workforce efficiency and reducing costs will further sway the industry scenario

Regional Insights

North America to dominate market share during the forecast period. Overall, the Oil and Gas Analytics market is poised for continued expansion in the coming years due to the increasing demand for sustainable and innovative products, as well as the widespread adoption of technology. By 2030, the global Oil and Gas Analytics market size is projected to reach multimillion figures, displaying an unexpected compound annual growth rate between 2023 and 2030 when compared to the figures observed in 2023.

Key Market Players

SAP SE

Microsoft Corporation

Hitachi America, Ltd.

Oracle Corporation

Cognizant Technology Solutions U.S.

Capgemini

Accenture plc

Cisco System, Inc.

Tibco software

IBM (International Business Machines Corporation)

Report Scope:

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

Oil and Gas Analytics Market, By Service:

Professional

Cloud

Integration

Oil and Gas Analytics Market, By Deployment Mode:

On-premises

Cloud

Oil and Gas Analytics Market, By Application:

Upstream

Exploration and Drilling

Field Surveillance and Monitoring

Production Planning and Forecasting

Equipment Maintenance Management

Asset Performance

Workforce Management

Midstream

Pipeline SCADA

Fleet

Storage Optimization

Downstream

Commodity Trading

Demand Forecasting

Pricing

Refining

Oil and Gas Analytics 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 present in the Global Oil and Gas Analytics Market.

Available Customizations:

Global Oil and Gas Analytics 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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 - 15.5.2. Key Revenue and Financials (If Available)
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel
 - 15.5.5. Key Product/Services
- 15.6. Capgemini
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16. STRATEGIC RECOMMENDATIONS

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