

Asia Pacific Horizontal Directional Drilling Market Forecast to 2030 - Regional Analysis - by End Use (Telecommunications, Oil & Gas, Sewer & Water, Environmental Wells, and Utility), Rig Size [Small (Less than 40,000 lbs.), Medium (40,000-100,000 lbs), and Large (More than 100,000 lbs.)], and Application (Onshore and Offshore)

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Abstracts

The Asia Pacific horizontal directional drilling market was valued at US\$ 625.87 million in 2022 and is expected to reach US\$ 1,354.72 million by 2030; it is estimated to register a CAGR of 10.1% from 2022 to 2030.

Development of Smart Cities Boosts Asia Pacific Horizontal Directional Drilling Market

Installing sewage pipelines, expansion of broadband services in remote or rural areas, and installing electricity transmission lines involve drilling activities, which require horizontal directional drilling equipment. Adequate water supply, proper sanitation, including waste management, assured electricity supply, and efficient urban mobility are a few of the necessities of the smart city. Developing new infrastructures such as universities, schools, housing, and IT data centers requires a high level of drilling activities for the installation of underground pipelines and cables, which is anticipated to boost the application of horizontal directional drilling equipment in the coming years. For instance, in 2023, Kerala Water Authority and the city corporation initiated a project on utilizing Japanese decentralized wastewater treatment plants known as "Johkasou" in the city. The construction of metro facilities, new airports, or expansion of the railway network is also anticipated to fuel the demand for horizontal directional drilling equipment. In 2022, the Government of India announced its plans to build 220 airports

by the end of 2025. In 2023, the government also approved US\$ 3.93 billion for seven transformative railway projects to boost connectivity. Thus, the development of smart cities is anticipated to bring new trends in the horizontal directional drilling market.

Asia Pacific Horizontal Directional Drilling Market Overview

The Asia Pacific horizontal directional drilling market is segmented into India, China, Australia, Japan, South Korea, New Zealand, and the Rest of Asia Pacific. Asia Pacific is a substantial consumer of oil and natural gas. Rapid industrialization and population growth have driven the demand for energy. Asia Pacific is home to substantial oil & gas reserves. Countries such as China, India, Australia, Malaysia, and Indonesia have significant domestic oil & gas production. Several key market players in these countries are concentrating on enhanced oil recovery (EOR) projects to fulfill the growing consumption of oil. In April 2022, China National Offshore Oil Corporation, one of the leading national oil companies in China, announced the country's first offshore large-scale super heavy oil recovery oilfield into operation. The successful operation of this heavy oil thermal recovery development model is expected to help expand the reserves for heavy oil resources in the Bohai Bay basin. As a result, the number of EOR projects is rising in this region, which is anticipated to bolster the demand for horizontal directional drilling equipment in the coming years. In addition, the exploration of novel offshore oil & gas fields and the construction of new offshore oil & gas fields across different countries of the region are the significant factors driving the demand for horizontal directional drilling equipment across Asia Pacific. For instance, in July 2023, Petronas, a Malaysian government company, stated that it had constructed six new locations for offshore oil & gas facilities. In July 2022, the government of the Philippines announced that it would redevelop its 30-year-old Cadlao Oil Field, which will allow it to boost the country's offshore oil production in the coming years. Such developments are driving the growth of the Asia Pacific horizontal directional drilling market.

The growing development of telecom projects to expand network and broadband services across various parts of different countries such as India, China, and Australia are boosting the drilling activities in these nations, which is having a positive impact on the Asia Pacific horizontal directional drilling market. Also, growing mineral explorations in Japan and South Korea are boosting the number of drilling projects, which is increasing the application of horizontal directional drilling equipment in Asia Pacific.

Moreover, sewage and wastewater treatment facilities and smart city development projects in China, India, and Australia are a few of the major application areas of horizontal directional drilling equipment, which is propelling the growth of the Asia

Pacific horizontal directional drilling market.

Asia Pacific Horizontal Directional Drilling Market Revenue and Forecast to 2030 (US\$ Million)

Asia Pacific Horizontal Directional Drilling Market Segmentation

The Asia Pacific horizontal directional drilling market is categorized into end use, rig size, application, and country.

Based on end use, the Asia Pacific horizontal directional drilling market is segmented telecommunications, oil & gas, sewer & water, environmental wells, and utility. The oil & gas segment held the largest market share in 2022.

By rig size, the Asia Pacific horizontal directional drilling market is segmented into small (below 40,000 Lbs), medium (40,000 - 100,000 Lbs), and large (above 100,000 Lbs). The large (above 100,000 Lbs) segment held the largest market share in 2022.

Based on application, the Asia Pacific horizontal directional drilling market is bifurcated into onshore and offshore. The onshore segment held a larger market share in 2022.

By country, the Asia Pacific horizontal directional drilling market is segmented into Australia, China, India, Japan, South Korea, New Zealand, and the Rest of Asia Pacific. China dominated the Asia Pacific horizontal directional drilling market share in 2022.

American Augers Inc, Drillto Trenchless Co Ltd, Epiroc AB, Herrenknecht AG, Laney Directional Drilling Co, Nabors Industries Ltd, Prime Drilling GmbH, Tracto-Technik GmbH & Co KG, and Vermeer Corp are some of the leading companies operating in the Asia Pacific horizontal directional drilling market.

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