

Europe 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 Europe horizontal directional drilling market was valued at US\$ 561.83 million in 2022 and is expected to reach US\$ 1,247.49 million by 2030; it is estimated to register a CAGR of 10.5% from 2022 to 2030.

Rising Infrastructure Development in Telecommunications and Mineral Exploration Sectors Drives Europe Horizontal Directional Drilling Market

The growing urbanization and rising government focus on infrastructure development that involve network expansion in rural areas are a few factors increasing the application of horizontal directional drilling equipment. For instance, in 2023, Grid Telecom and Exa Infrastructure collaborated to boost digital connectivity and offer infrastructure services anchored in Europe. The partnership is focusing on offering their wholesale and corporate customers diverse open-access interconnection and international reach across Europe. Additionally, in 2022, Telecom Italia (TIM) won contracts worth US\$ 86.94 million in a government tender to develop 5G networks in the rural area of Italy. With these initiatives, the number of underground cable installations for expanding telecom connections in remote locations is also growing. The onshore and offshore mineral exploration requires a high level of drilling activities, which is boosting the application of horizontal directional drilling equipment across the globe.

Governments of various countries are working on mineral exploration projects as one of the major parts of their economic development. Also, they are focused on the discovery of new mining locations, as well as the upgradation and maintenance of already existing mining sites. Thus, rising infrastructure development in the telecommunications and mineral exploration sectors fuels the horizontal directional drilling market growth.

Europe Horizontal Directional Drilling Market Overview

The growing energy demand and government initiative toward natural gas production facilities are having a positive impact on drilling activities. The upsurging requirement for drilling activities boosts the need for horizontal directional drilling equipment in different countries across Europe. In 2023, Prysmian Group initiated horizontal directional drilling activity that will grant the subsea cables to establish an energy transmission connection between Germany and the UK. The project was led by investors such as Allianz Capital Partners, Meridiam, TEPCO, Kansai Electric Power, and NeuConnect. The project is interconnecting ~725 kilometers of land and subsea cables, establishing an energy pathway between Germany and the UK. In addition, in 2023, Germany and Italy started a hydrogen pipeline construction project. The countries signed an agreement to establish a pipeline that would enable the transportation of gas and hydrogen between them. Thus, the increasing number of oil & gas transmission pipeline projects and rising investments in the development of gas pipeline infrastructure boost the demand for horizontal directional drilling equipment in the region. In 2023, Altamin, a European metals producer, put up applications for new exploration licenses at the Villar Graphite Project and Lazio Lithium Project situated in the Piedmont and Lazio of Italy. Thus, the growing focus on the mineral exploration sector acts as a driver for horizontal directional drilling equipment demand. Norway has substantial offshore oil & gas reserves in the North and Norwegian Seas. The exploration and production activities in these areas have been highly successful, contributing to the Europe horizontal directional drilling market growth.

Telecom and internet connection expansion projects in different parts of Europe are having a positive impact on the demand for horizontal directional drilling equipment. In 2023, Grid Telecom and Exa Infrastructure collaborated to boost digital connectivity and offer infrastructure services anchored in Europe. The partnership focuses on offering their wholesale and corporate customers diverse open-access interconnection and international reach across Europe. The growing development in the telecommunication sector has a positive influence on the Europe horizontal directional drilling market.

The rising development of smart utility services and infrastructure such as water and wastewater treatment facilities propel the growth of the Europe horizontal directional drilling market.

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

Europe Horizontal Directional Drilling Market Segmentation

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

Based on end use, the Europe 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 Europe 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 Europe horizontal directional drilling market is bifurcated into onshore and offshore. The onshore segment held a larger market share in 2022.

By country, the Europe horizontal directional drilling market is segmented into Germany, France, Italy, the UK, Russia, and the Rest of Europe. Germany dominated the Europe 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 Europe horizontal directional drilling market.

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