

Europe Smart Casing Running Tool Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe Smart Casing Running Tool Market is projected to grow significantly, reaching an estimated US\$ 389.9 million by 2031, up from US\$ 253.9 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 6.4% from 2025 to 2031.

Executive Summary and Market Analysis

The upstream oil and gas sector in Europe is at a crucial turning point, particularly as offshore developments gain prominence due to increasing energy security concerns and ambitious decarbonization goals. This evolving landscape offers substantial growth opportunities for providers of smart casing running tools, as offshore operators are in search of advanced, efficient, and sustainable solutions to facilitate a new wave of exploration and production (E&P) activities. The North Sea is central to this momentum, with up to ten regional projects anticipated to reach final investment decisions (FIDs) within the next two years. As Europe intensifies its efforts towards energy independence and climate neutrality, the offshore sector is becoming a vital driver of economic resilience and environmental progress. In this context, technologies such as smart casing running tools—characterized by automation, remote monitoring, and real-time operational control—are increasingly essential for ensuring safe, efficient, and low-emission drilling operations.

According to EICDataStream, as of June 2024, there are over 260 active and proposed upstream oil and gas projects across Europe, collectively valued at more than US\$ 132 billion, with expected commencement by 2030. A significant portion of these initiatives is concentrated in the UK and Norway, which together account for over 80% of the region's upstream project pipeline, with combined capital expenditures exceeding US\$

109 billion. However, only 24% of these projects have progressed to the construction phase, leaving a substantial 76% still in pre-construction stages. This scenario presents a considerable opportunity for manufacturers and service providers of smart casing running tools to engage early with operators, influence project design specifications, and position their technologies as integral to modern offshore casing operations. With a strong emphasis on digitalization, operational safety, and emissions reduction, the smart casing running tool market aligns well with the strategic priorities shaping Europe's upstream sector.

Strategic Insights

Market Segmentation Analysis

The Europe Smart Casing Running Tool Market can be segmented as follows:

By Hardware: The market includes components such as Remote Display, Sensor Kit, Head Assembly, Gripping Assembly, Circulator Assembly, Power Supply, and Other Accessories. The Head Assembly segment led the market in 2024.

By Sensor Kit Type: This includes Torque and Tension Sensor, Position Sensor, Data Transmission Sensor, and Others, with the Torque and Tension Sensor segment dominating in 2024.

By Software: The market is divided into Inbuilt and Optional software, with the Inbuilt segment leading in 2024.

By Sales: The market is segmented into Direct Sales and Aftermarket, with Direct Sales being the dominant channel in 2024.

By Aftermarket Sales Channel: This includes Parts and Accessories and Service and Rental, with Parts and Accessories leading in 2024.

By Application: The market is divided into Onshore and Offshore applications, with Offshore being the dominant segment in 2024.

By Technology: The market includes Fully Automated CRT, Remotely Operated CRT, and Hybrid CRT, with Fully Automated CRT leading in 2024.

Market Outlook

The ongoing digitalization and automation of oilfield operations are key drivers of the smart casing running tool market. As the oil and gas industry increasingly adopts IoT, real-time data analytics, machine learning, and remote monitoring technologies, there is a clear shift towards integrating smart tools that enhance operational visibility, efficiency, and control. Smart casing running tools, equipped with sensors and digital interfaces, seamlessly fit into this evolving digital ecosystem by enabling automated casing deployment, real-time torque and drag measurement, and remote operation—critical capabilities for reducing human error, improving decision-making, and optimizing performance in complex wells. This trend is particularly relevant in offshore and high-risk environments, where precision and minimal intervention are paramount. By leveraging digitalization, these tools can alert operators to potential issues before they escalate, enable predictive maintenance, and streamline casing operations, contributing to safer and more cost-effective well construction.

Company Profiles

Key players in the Europe Smart Casing Running Tool Market include NOV Inc, Weatherford International Plc, McCoy Global Inc., Nabors Industries Ltd, Expro Group Holdings NV, Odfjell Technology Ltd, Volant Products, Parker Drilling Company, Premiere, Inc, and Magnum Manufacturing. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to deliver innovative products and enhance their market share.

In summary, the Europe Smart Casing Running Tool Market is poised for significant growth, driven by the increasing demand for advanced technologies in the oil and gas sector, particularly in offshore operations. The integration of smart technologies is essential for improving operational efficiency and safety, making this market a critical area of focus for industry stakeholders.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. SMART CASING RUNNING TOOL MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
- 4.4 List of Vendors in the Value Chain
- 4.5 Technology Trends
 - 4.5.1 Manual vs. Automated CRTs
 - 4.5.2 Automated CRT/TRT Systems are Replacing Hydraulic Tongs in Modern Rigs
 - 4.5.2.1 Advancements in Automation
 - 4.5.2.2 Safety and Efficiency Enhancements
 - 4.5.2.3 Cost Implications
 - 4.5.2.4 Industry Adoption and Future Outlook

4.5.3 Top-Drive integration: Automated CRTs and TRTs Connection

4.5.3.1 Overview

4.5.3.2 Strategic Importance of Integration

4.5.3.2.1 Operational Efficiency

4.5.3.2.2 Safety and HSE Improvements

4.5.3.2.3 Cost Management and ROI

4.5.3.2.4 Technology Synergy and Data Integration

4.5.3.4 Market Implications and Competitive Advantage

4.5.4 Key Companies and their Product Offerings

5. EUROPE SMART CASING RUNNING TOOL MARKET - KEY MARKET DYNAMICS

5.1 Market Drivers

5.2 Market Restraints

5.3 Market Opportunities

5.4 Future Trends

5.5 Impact of Drivers and Restraints:

6. SMART CASING RUNNING TOOL MARKET - EUROPE MARKET ANALYSIS

6.1 Europe Smart Casing Running Tool Market Revenue (US\$ Million), 2024 - 2031

6.2 Europe Smart Casing Running Tool Market Forecast and Analysis

7. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY HARDWARE

7.1 Remote Display

7.1.1 Overview

7.1.2 Remote Display: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Sensor Kit

7.2.1 Overview

7.2.2 Sensor Kit: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Head Assembly

7.3.1 Overview

7.3.2 Head Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.4 Gripping Assembly

7.4.1 Overview

7.4.2 Gripping Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.5 Circulator Assembly

7.5.1 Overview

7.5.2 Circulator Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.6 Power Supply

7.6.1 Overview

7.6.2 Power Supply: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.7 Other Accessories

7.7.1 Overview

7.7.2 Other Accessories: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SENSOR KIT TYPE

8.1 Torque and Tension Sensor

8.1.1 Overview

8.1.2 Torque and Tension Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Position Sensor

8.2.1 Overview

8.2.2 Position Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Data Transmission Sensor

8.3.1 Overview

8.3.2 Data Transmission Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Others

8.4.1 Overview

8.4.2 Others: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SOFTWARE

9.1 Inbuilt

9.1.1 Overview

9.1.2 Inbuilt: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Optional

9.2.1 Overview

9.2.2 Optional: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SALES

10.1 Direct Sales

10.1.1 Overview

10.1.2 Direct Sales: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 Aftermarket

10.2.1 Overview

10.2.2 Aftermarket: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY AFTERMARKET SALES CHANNEL

11.1 Parts and Accessories

11.1.1 Overview

11.1.2 Parts and Accessories: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2 Service and Rental

11.2.1 Overview

11.2.2 Service and Rental: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY APPLICATION

12.1 Onshore

12.1.1 Overview

12.1.2 Onshore: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.2 Offshore

12.2.1 Overview

12.2.2 Offshore: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13. EUROPE SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY TECHNOLOGY

13.1 Fully Automated CRT

13.1.1 Overview

13.1.2 Fully Automated CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13.2 Remotely Operated CRT

13.2.1 Overview

13.2.2 Remotely Operated CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13.3 Hybrid CRT

13.3.1 Overview

13.3.2 Hybrid CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14. EUROPE SMART CASING RUNNING TOOL MARKET - COUNTRY ANALYSIS

14.1 Europe

14.1.1 Europe Smart Casing Running Tool Market Revenue and Forecast and Analysis - by Country

14.1.1.1 Europe Smart Casing Running Tool Market Revenue and Forecast and Analysis - by Country

14.1.2.2 Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.1.2.2.1 Germany: Europe Smart Casing Running Tool Market Share - by Hardware

14.1.2.2.2 Germany: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.1.2.2.3 Germany: Europe Smart Casing Running Tool Market Share - by Software

14.1.2.2.4 Germany: Europe Smart Casing Running Tool Market Share - by Sales

14.1.2.2.5 Germany: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.1.2.2.6 Germany: Europe Smart Casing Running Tool Market Share - by Application

14.1.2.2.7 Germany: Europe Smart Casing Running Tool Market Share - by Technology

14.2.3.3 France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.2.3.3.1 France: Europe Smart Casing Running Tool Market Share - by Hardware

14.2.3.3.2 France: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.2.3.3.3 France: Europe Smart Casing Running Tool Market Share - by Software

14.2.3.3.4 France: Europe Smart Casing Running Tool Market Share - by Sales

14.2.3.3.5 France: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.2.3.3.6 France: Europe Smart Casing Running Tool Market Share - by Application

14.2.3.3.7 France: Europe Smart Casing Running Tool Market Share - by Technology

14.3.4.4 Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.3.4.4.1 Italy: Europe Smart Casing Running Tool Market Share - by Hardware

14.3.4.4.2 Italy: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.3.4.4.3 Italy: Europe Smart Casing Running Tool Market Share - by Software

14.3.4.4.4 Italy: Europe Smart Casing Running Tool Market Share - by Sales

14.3.4.4.5 Italy: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.3.4.4.6 Italy: Europe Smart Casing Running Tool Market Share - by Application

14.3.4.4.7 Italy: Europe Smart Casing Running Tool Market Share - by Technology

14.4.5.5 United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.4.5.5.1 United Kingdom: Europe Smart Casing Running Tool Market Share - by Hardware

14.4.5.5.2 United Kingdom: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.4.5.5.3 United Kingdom: Europe Smart Casing Running Tool Market Share - by Software

14.4.5.5.4 United Kingdom: Europe Smart Casing Running Tool Market Share - by

Sales

14.4.5.5.5 United Kingdom: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.4.5.5.6 United Kingdom: Europe Smart Casing Running Tool Market Share - by Application

14.4.5.5.7 United Kingdom: Europe Smart Casing Running Tool Market Share - by Technology

14.5.6.6 Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.5.6.6.1 Russia: Europe Smart Casing Running Tool Market Share - by Hardware

14.5.6.6.2 Russia: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.5.6.6.3 Russia: Europe Smart Casing Running Tool Market Share - by Software

14.5.6.6.4 Russia: Europe Smart Casing Running Tool Market Share - by Sales

14.5.6.6.5 Russia: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.5.6.6.6 Russia: Europe Smart Casing Running Tool Market Share - by Application

14.5.6.6.7 Russia: Europe Smart Casing Running Tool Market Share - by Technology

14.6.7.7 Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.6.7.7.1 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Hardware

14.6.7.7.2 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Sensor Kit Type

14.6.7.7.3 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Software

14.6.7.7.4 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Sales

14.6.7.7.5 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.6.7.7.6 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Application

14.6.7.7.7 Rest of Europe: Europe Smart Casing Running Tool Market Share - by Technology

15 COMPETITIVE LANDSCAPE

- 15.1 Heat Map Analysis by Key Players
- 15.2 Company Positioning & Concentration

16 INDUSTRY LANDSCAPE

- 16.1 Overview
- 16.2 New Product Development
- 16.3 Merger and Acquisition
- 16.4 Other Strategic Developments

17 COMPANY PROFILES

- 17.1 NOV Inc
 - 17.1.1 Key Facts
 - 17.1.2 Business Description
 - 17.1.3 Products and Services
 - 17.1.4 Financial Overview
 - 17.1.5 SWOT Analysis
 - 17.1.6 Key Developments
- 17.2 Weatherford International Plc
 - 17.2.1 Key Facts
 - 17.2.2 Business Description
 - 17.2.3 Products and Services
 - 17.2.4 Financial Overview
 - 17.2.5 SWOT Analysis
 - 17.2.6 Key Developments
- 17.3 McCoy Global Inc.
 - 17.3.1 Key Facts
 - 17.3.2 Business Description
 - 17.3.3 Products and Services
 - 17.3.4 Financial Overview
 - 17.3.5 SWOT Analysis
 - 17.3.6 Key Developments
- 17.4 Nabors Industries Ltd
 - 17.4.1 Key Facts
 - 17.4.2 Business Description
 - 17.4.3 Products and Services
 - 17.4.4 Financial Overview
 - 17.4.5 SWOT Analysis

- 17.4.6 Key Developments
- 17.5 Expro Group Holdings NV
 - 17.5.1 Key Facts
 - 17.5.2 Business Description
 - 17.5.3 Products and Services
 - 17.5.4 Financial Overview
 - 17.5.5 SWOT Analysis
 - 17.5.6 Key Developments
- 17.6 Odfjell Technology Ltd
 - 17.6.1 Key Facts
 - 17.6.2 Business Description
 - 17.6.3 Products and Services
 - 17.6.4 Financial Overview
 - 17.6.5 SWOT Analysis
 - 17.6.6 Key Developments
- 17.7 Volant Products
 - 17.7.1 Key Facts
 - 17.7.2 Business Description
 - 17.7.3 Products and Services
 - 17.7.4 Financial Overview
 - 17.7.5 SWOT Analysis
 - 17.7.6 Key Developments
- 17.8 Parker Drilling Company
 - 17.8.1 Key Facts
 - 17.8.2 Business Description
 - 17.8.3 Products and Services
 - 17.8.4 Financial Overview
 - 17.8.5 SWOT Analysis
 - 17.8.6 Key Developments
- 17.9 Premiere, Inc
 - 17.9.1 Key Facts
 - 17.9.2 Business Description
 - 17.9.3 Products and Services
 - 17.9.4 Financial Overview
 - 17.9.5 SWOT Analysis
 - 17.9.6 Key Developments
- 17.10 Magnum Manufacturing
 - 17.10.1 Key Facts
 - 17.10.2 Business Description

17.10.3 Products and Services

17.10.4 Financial Overview

17.10.5 SWOT Analysis

17.10.6 Key Developments

18. APPENDIX

18.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Europe Smart Casing Running Tool Market Segmentation

Table 2. List of Vendors

Table 3. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 5. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 6. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 7. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 8. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 9. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 10. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 11. Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 12. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 13. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 14. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 15. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 16. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 17. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 18. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 19. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 20. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 21. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 22. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 23. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 24. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 25. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 26. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 27. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 28. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 29. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 30. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 31. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 32. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 33. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 34. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 35. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 36. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 37. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 38. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and

Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 39. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 40. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 41. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 42. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 43. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 44. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 45. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 46. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 47. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 48. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 49. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 50. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 51. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 52. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 53. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 54. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Europe Smart Casing Running Tool Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Smart Casing Running Tool Market

Figure 4. Europe Smart Casing Running Tool Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Europe Smart Casing Running Tool Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Europe Smart Casing Running Tool Market Share (%) - by Hardware, 2024 and 2031

Figure 8. Remote Display: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Sensor Kit: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Head Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Gripping Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Circulator Assembly: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Power Supply: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Other Accessories: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Europe Smart Casing Running Tool Market Share (%) - by Sensor Kit Type, 2024 and 2031

Figure 16. Torque and Tension Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Position Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Data Transmission Sensor: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Others: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Europe Smart Casing Running Tool Market Share (%) - by Software, 2024

and 2031

Figure 21. Inbuilt: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Optional: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Europe Smart Casing Running Tool Market Share (%) - by Sales, 2024 and 2031

Figure 24. Direct Sales: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Aftermarket: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Europe Smart Casing Running Tool Market Share (%) - by Aftermarket Sales Channel, 2024 and 2031

Figure 27. Parts and Accessories: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Service and Rental: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 29. Europe Smart Casing Running Tool Market Share (%) - by Application, 2024 and 2031

Figure 30. Onshore: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 31. Offshore: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 32. Europe Smart Casing Running Tool Market Share (%) - by Technology, 2024 and 2031

Figure 33. Fully Automated CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 34. Remotely Operated CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 35. Hybrid CRT: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 36. Europe Smart Casing Running Tool Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 37. Germany: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 38. France: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 39. Italy: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 40. United Kingdom: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 41. Russia: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 42. Rest of Europe: Europe Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 43. Company Positioning & Concentration

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