

Middle East & Africa 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 Middle East & Africa horizontal directional drilling market was valued at US\$ 515.74 million in 2022 and is expected to reach US\$ 1,262.26 million by 2030; it is estimated to register a CAGR of 11.8% from 2022 to 2030.

Increasing Application of Horizontal Directional Drilling Equipment in Sewer & Water and Oil & Gas Sectors Bolsters Middle East & Africa Horizontal Directional Drilling Market

The volume of sewage is rising with population growth. The majority of wastewater is generated by households and industries. Every year, ~380 billion m³ (cubic meters) of municipal wastewater is produced globally. As a result, the demand for proper infrastructure development in the sewer & water sector is increasing due to the growing population and rising urbanization. Governments of several countries are focusing on installing proper wastewater and sewage treatment facilities to protect the environment from pollution. For instance, in 2024, Egypt's Minister of International Cooperation inked a US\$ 53.6 million (50 million) funding agreement with the French Development Agency (AFD), in addition to a further grant of US\$ 1.6 million (1.5 million). The partnership seeks to facilitate the completion of the Al Gabal Al Asfar Wastewater Treatment Plant's third phase. According to Hassan Allam Holding, the 1,800,000 m³/day wastewater

treatment plant in Cairo is the biggest in the MENA region. The growing emphasis on proper sewer and water infrastructure is boosting drilling activities, which is increasing the application of horizontal directional drilling equipment worldwide.

Moreover, there is a surge in energy demand due to the growing global population. According to Exxon Mobil Corporation's report, the global energy demand is expected to reach 660 quadrillion Btu in 2050, up around 15% from 2021 due to population growth and increased affluence. Natural gas has the potential application in electricity generation, which boosts its demand in various industries. For instance, in 2022, an agreement was made between Kuwait and Saudi Arabia regarding the joint development plan for the offshore gas resource known as Dorra. In 2023, in order to conduct offshore exploration in the Mediterranean Sea and the Nile Delta, Egypt intends to invest US\$ 1.8 billion in the drilling of additional gas wells. Chevron, Eni, ExxonMobil, Shell, and BP are among the multinational corporations involved in the offshore exploration program. From now until July 2025, the program intends to drill 35 exploration gas wells.

Furthermore, the growing offshore drilling activities for crude oil and gas exploration are boosting the demand for horizontal directional drilling equipment. For instance, in November 2023, Shell Egypt announced that it had successfully completed the drilling of the first well in its three-well exploration campaign, Mina West, located in the Northeast El-Amriya block in the Mediterranean Sea. Thus, an increase in offshore oil & gas exploration activities bolsters the expansion of gas pipeline infrastructure, which is propelling the application of horizontal directional drilling equipment. Thus, the rising infrastructure development in the sewer & water and oil & gas sectors drives the horizontal directional drilling market.

Middle East & Africa Horizontal Directional Drilling Market Overview

As per the IEA, the Middle East & Africa generate ~95% of their electricity from oil & gas. More than 290 billion cubic meters of gas, or more than one-third of the region's gas production, are consumed by thermal plants. The Middle East has a high potential for natural gas production, owing to the major gas fields in the Arabian Iranian basin. The Permian Khuff formation signifies a crucial gas-bearing horizon. The abundance of natural gas and growing demand for natural gas in different end use applications are increasing the growth of the oil & gas pipeline infrastructure in the region, which is expanding the scope of drilling activities and leading to a positive impact on the Middle East & Africa horizontal directional drilling market. Offshore oil drilling activities are also boosting the demand for horizontal directional drilling equipment in the region. For

instance, in January 2023, Masirah Oil, a subsidiary of Singapore-headquartered independent Rex International, announced that it had completed an offshore drilling campaign in Oman's Block 50. In October 2023, KCA Deutag, a leading drilling, engineering, and technology partner, announced its first locally made rig in Oman during a ceremony of Petroleum Development Oman (PDO). Similarly, in November 2023, Shell Egypt announced that it had completed the drilling of the first well in its three-well exploration campaign, Mina West, located in the Northeast El-Amriya block in the Mediterranean Sea. Thus, such factors are boosting the growth of offshore oil & gas drilling activities, contributing to the Middle East & Africa horizontal directional drilling market expansion.

Middle East & Africa Horizontal Directional Drilling Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa Horizontal Directional Drilling Market Segmentation

The Middle East & Africa horizontal directional drilling market is categorized into end use, rig size, application, and country.

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

By country, the Middle East & Africa horizontal directional drilling market is segmented into South Africa, Saudi Arabia, the UAE, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa 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 Middle East & Africa horizontal directional drilling market.

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