

# **North America 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 North America horizontal directional drilling market was valued at US\$ 902.96 million in 2022 and is expected to reach US\$ 2,152.14 million by 2030; it is estimated to register a CAGR of 11.5% from 2022 to 2030.

Increasing Application of Horizontal Directional Drilling Equipment in Sewer & Water and Oil & Gas Sectors Fuels North America 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 m<sup>3</sup> (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. In 2022, more than 16,000 public wastewater treatment facilities were in the US. Over 80% of the US population consumes drinking water from these facilities after proper treatment, and approximately 75% of the US population has sanitary sewerage treated in these treatment facilities. 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. As per The US Energy Information Administration (EIA), US energy consumption is anticipated to grow through 2050 owing to economic and population growth. Natural gas has the potential application in electricity generation, which boosts its demand in various industries. In addition, in 2023, Petroleos Mexicanos and an association led by Talos Energy confirmed a field development plan for the Zama offshore oil field. 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 North America horizontal directional drilling market.

## North America Horizontal Directional Drilling Market Overview

North America is one of the prime markets in terms of investments in the oil & gas industry. The US is a key natural gas and crude oil producer globally. In 2022, the country showcased the highest natural gas production capacity, followed by Canada and Mexico. Ixachi, Coulomb Phase 2, Quesqui, Nejo (IEPC), Leo, May, Koban, and Powerball are a few of the natural gas-producing fields in North America. The Ixachi plant is in Veracruz, Mexico, and it produced 618.09mmcf/d (million cubic feet per day) in 2022. The Coulomb Phase 2 field, owned by Shell, is located in the Central Planning Area, US. There were 436 oil & gas rigs in the US in 2020, which increased to 580 in 2021 and 721 in 2022. Canada accounted for 91 oil & gas rigs in 2020, which increased to 149 in 2021 and 176 in 2022. Mexico had 41 oil & gas rigs in 2020, which increased to 45 in 2021 and 47 in 2022. Increasing gas exploration and oil production activities in the region and mounting number of oil & gas rigs across different countries of North America drive the North America horizontal directional drilling market growth. The rising demand for broadband services in North America is anticipated to boost investments in the cable network. The next-generation broadband technologies such as high-speed internet packages (FTTx) and 5G are increasing the deployment of cables, which is propelling the need for horizontal directional drilling activities in the region. In 2023, AT&T will expand 5G and fiber to connect urban, rural, and tribal communities nationwide. In Lawrence County, Indiana, AT&T is building AT&T Fiber for more than 1,200 customer locations in a project worth more than US\$4.3 million. In 2023, American Pacific Mining Corp declared that one drill rig remained to test the Christmas or Red Creek Target area during the demobilization of the 2023 mountain drilling program. The CRC Target is one of 12 known VMS assignments at the Palmer Project apart from the mineral resources of the Palmer and AG deposits. The growing focus on the mineral exploration sector is anticipated to propel the growth of the North America horizontal directional drilling market.

## North America Horizontal Directional Drilling Market Revenue and Forecast to 2030 (US\$ Million)

### North America Horizontal Directional Drilling Market Segmentation

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

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

By rig size, the North America 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 North America horizontal directional drilling market is bifurcated into onshore and offshore. The onshore segment held a larger market share in 2022.

By country, the North America horizontal directional drilling market is segmented into the US, Canada, and Mexico. The US dominated the North America 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, The Charles Machine Works Inc, Tracto-Technik GmbH & Co KG, and Vermeer Corp are some of the leading companies operating in the North America horizontal directional drilling market.

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