

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

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Abstracts

The North America Smart Casing Running Tool Market is projected to grow significantly, reaching approximately US\$ 998.8 million by 2031, up from US\$ 601.7 million in 2024. This growth represents a compound annual growth rate (CAGR) of 7.6% from 2025 to 2031.

Executive Summary and Market Analysis

The oil and gas sector in North America is undergoing a notable transformation, with a growing focus on automation, safety, and efficiency in drilling and completion processes. Smart casing running tools, which incorporate automation, remote monitoring, and real-time data capabilities into traditional casing handling equipment, are becoming increasingly vital in modern rig operations. North America remains a leader in global oil and gas production, largely due to its effective exploitation of unconventional resources, particularly shale oil and gas. Key regions such as the Permian Basin (Texas and New Mexico), Eagle Ford (South Texas), and Bakken (North Dakota and Montana) are characterized by complex horizontal and extended-reach wells, which pose unique technical challenges. As operators drill deeper and extend laterally to maximize reservoir contact, the complexity of casing running operations has escalated, driving demand for advanced, intelligent downhole tools.

Major exploration and production (E&P) companies are actively pursuing oil production across various North American regions. For example, in April 2025, Chevron Corporation announced the commencement of oil and natural gas production from the Ballymore subsea tieback in the deep-water Gulf of America. This project is part of Chevron's strategy to achieve a production target of 300,000 net barrels per day of oil equivalent from the Gulf by 2026. The Ballymore project is expected to yield up to

75,000 gross barrels of oil per day through three wells connected to the existing Chevron-operated Blind Faith facility. As E&P companies strive for enhanced performance and reduced risk, smart casing running tools are emerging as strategic assets that improve execution efficiency while supporting digital transformation and environmental, social, and governance (ESG) objectives. This trend is anticipated to accelerate as these tools become more affordable, interoperable, and intelligent.

Market Segmentation Analysis

The North America 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 was the market leader 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 leading in 2024.

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

By Sales: The market is categorized into Direct Sales and Aftermarket, with Direct Sales being the leading segment in 2024.

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

By Application: The market is segmented into Onshore and Offshore applications, with Onshore 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 growth of the smart casing running tool market is significantly influenced by the

increase in global drilling activity, driven by rising energy demand and expanding exploration in both conventional and unconventional reservoirs. As more wells are drilled, particularly in complex environments such as deepwater and shale formations, the need for efficient, precise, and reliable casing operations becomes critical. Smart casing running tools are designed to meet this demand by offering automated, data-driven capabilities that minimize manual intervention, reduce operational failures, and enhance safety. These tools facilitate faster and more accurate casing deployment, even in high-pressure/high-temperature (HPHT) and deviated wellbores, helping operators reduce non-productive time (NPT) and optimize rig performance.

The push for increased efficiency in drilling operations, especially in high-value and technically challenging projects in regions like the US Permian Basin, Brazil's offshore fields, and West Africa, is further accelerating the adoption of smart casing running tools. Their ability to provide real-time monitoring, torque and drag optimization, and remote control makes them essential in modern drilling operations, where speed, safety, and precision are paramount.

Country Insights

The North America Smart Casing Running Tool Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The rise of unconventional drilling techniques, particularly in large offshore oil and gas reservoirs, has introduced greater operational challenges in casing running. Horizontal and extended-reach wells require specialized tools capable of handling increased friction, torque, and pressure. The Gulf of Mexico continues to play a crucial role in US oil production, accounting for about 15% of total domestic oil production and 2% of natural gas production in 2023. The region is home to significant oil fields, and offshore production remains vital for the US energy sector.

Company Profiles

Key players in the North America 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 enhance their market presence and offer innovative products to consumers.

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