

South & Central 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 South & Central America horizontal directional drilling market was valued at US\$ 196.29 million in 2022 and is expected to reach US\$ 403.85 million by 2030; it is estimated to register a CAGR of 9.4% from 2022 to 2030.

Rising Infrastructure Development in Telecommunications and Mineral Exploration Sectors Fuels South & Central America 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 2024, TIM, a Brazilian mobile provider, and Nokia collaborated to create a private 5G network at the port of Santos. Also, in 2023, Jacto, a Brazilian maker of agricultural equipment, signed a contract with Nokia to establish a private 5G network in a new plant. 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.

South & Central America Horizontal Directional Drilling Market Overview

The application of natural gas is projected to be boosted by the energy sector, driven by mounting electricity demand and a growing need for fuel switching. The rising energy demand in South America is attributed to population growth and industrialization, which fuels the need for increased gas production. As a result, the gas industry in South America attracts significant investments from domestic and foreign companies. Partnerships between national oil companies and international collaborators drive the oil & gas industry's growth. In July 2022, Gramercy Funds Management and Atmos Global Energy, two US-based investment groups, joined forces with a Venezuelan company, Inelectra Group, to find out oil and gas exploration and production projects in the US-sanctioned South American nation. Thus, the rising investments in the oil & gas industry in South & Central America support the growth of the South & Central America horizontal directional drilling market. The development of new offshore oil and gas rigs is also tending to boost the market growth in the coming years. In August 2023, Exxon announced its plans to develop its sixth offshore oil project worth US\$ 12,93 billion in Guyana. Such developments have been catalyzing the demand for horizontal directional drilling equipment in South & Central America.

In 2024, the Government of India signed an agreement with Argentina for the exploration of lithium in the South American nation, which is important for the transformation toward an 'environment-friendly' future. In 2024, Alvo Minerals acquired the Ipora REE exploration project in central Brazil. The growing mining exploration activities boost the application of horizontal directional drilling equipment in South & Central America.

South & Central America Horizontal Directional Drilling Market Revenue and Forecast to 2030 (US\$ Million)

South & Central America Horizontal Directional Drilling Market Segmentation

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

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

By country, the South & Central America horizontal directional drilling market is segmented into Brazil, Argentina, and the Rest of South & Central America. The Rest of South & Central America dominated the South & Central 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, Tracto-Technik GmbH & Co KG, and Vermeer Corp are some of the leading companies operating in the South & Central America horizontal directional drilling market.

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