

# **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)**

<https://marketpublishers.com/r/S7C59BD3A466EN.html>

Date: August 2024

Pages: 95

Price: US\$ 3,550.00 (Single User License)

ID: S7C59BD3A466EN

## **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.

## Contents

### **1. INTRODUCTION**

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights
- 2.2 Market Attractiveness

### **3. RESEARCH METHODOLOGY**

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

### **4. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET LANDSCAPE**

- 4.1 Overview
- 4.2 Ecosystem Analysis
  - 4.2.1 List of Vendors in the Value Chain

### **5. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET - KEY MARKET DYNAMICS**

- 5.1 Market Drivers
  - 5.1.1 Increasing Application of Horizontal Directional Drilling Equipment in Sewer & Water and Oil & Gas Sectors
  - 5.1.2 Rising Infrastructure Development in Telecommunications and Mineral Exploration Sectors
- 5.2 Market Restraints
  - 5.2.1 Competition from Alternative Technologies
- 5.3 Market Opportunities
  - 5.3.1 Discovery of New Mineral Exploration Locations
- 5.4 Future Trends
  - 5.4.1 Development of Smart Cities

## 5.5 Impact of Drivers and Restraints:

## **6. HORIZONTAL DIRECTIONAL DRILLING MARKET - SOUTH & CENTRAL AMERICA MARKET ANALYSIS**

6.1 South & Central America Horizontal Directional Drilling Market Revenue (US\$ Million), 2020-2030

6.2 South & Central America Horizontal Directional Drilling Market Forecast Analysis

## **7. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET ANALYSIS - BY END USE**

### 7.1 Telecommunication

#### 7.1.1 Overview

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

### 7.2 Oil & Gas

#### 7.2.1 Overview

7.2.2 Oil & Gas: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

### 7.3 Sewer & Water

#### 7.3.1 Overview

7.3.2 Sewer & Water: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

### 7.4 Environmental Wells

#### 7.4.1 Overview

7.4.2 Environmental Wells: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

### 7.5 Utility

#### 7.5.1 Overview

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

## **8. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET ANALYSIS - BY RIG SIZE**

### 8.1 Small (Below 40000 lbs)

#### 8.1.1 Overview

8.1.2 Small (Below 40000 lbs): South & Central America Horizontal Directional Drilling

Market - Revenue and Forecast to 2030 (US\$ Million)

8.2 Medium (40000-100000 lbs)

8.2.1 Overview

8.2.2 Medium (40000-100000 lbs): South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

8.3 Large (Above 100000 lbs)

8.3.1 Overview

8.3.2 Large (Above 100000 lbs): South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

## **9. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET ANALYSIS - BY APPLICATION**

9.1 Onshore

9.1.1 Overview

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

9.2 Offshore

9.2.1 Overview

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

## **10. SOUTH & CENTRAL AMERICA HORIZONTAL DIRECTIONAL DRILLING MARKET - COUNTRY ANALYSIS**

10.1 Overview

10.1.1 South & Central America Horizontal Directional Drilling Market Breakdown, by Key Countries, 2022 and 2030 (%)

10.1.1.1 South & Central America Horizontal Directional Drilling Market - Revenue and Forecast Analysis - by Country

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

10.1.1.2.1 Brazil: South & Central America Horizontal Directional Drilling Market Breakdown, by End Use

10.1.1.2.2 Brazil: South & Central America Horizontal Directional Drilling Market Breakdown, by Rig Size

10.1.1.2.3 Brazil: South & Central America Horizontal Directional Drilling Market Breakdown, by Application

10.1.1.3 Argentina: South & Central America Horizontal Directional Drilling Market -

## Revenue and Forecast to 2030 (US\$ Million)

10.1.1.3.1 Argentina: South & Central America Horizontal Directional Drilling Market Breakdown, by End Use

10.1.1.3.2 Argentina: South & Central America Horizontal Directional Drilling Market Breakdown, by Rig Size

10.1.1.3.3 Argentina: South & Central America Horizontal Directional Drilling Market Breakdown, by Application

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

10.1.1.4.1 Rest of South & Central America Horizontal Directional Drilling Market Breakdown, by End Use

10.1.1.4.2 Rest of South & Central America Horizontal Directional Drilling Market Breakdown, by Rig Size

10.1.1.4.3 Rest of South & Central America Horizontal Directional Drilling Market Breakdown, by Application

## 11. COMPETITIVE LANDSCAPE

11.1 Company Positioning & Concentration

## 12. INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Market Initiative

## 13. COMPANY PROFILES

13.1 American Augers Inc

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

13.1.6 Key Developments

13.2 Drillto Trenchless Co Ltd

13.2.1 Key Facts

13.2.2 Business Description

13.2.3 Products and Services

- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments
- 13.3 Tracto-Technik GmbH & Co KG
  - 13.3.1 Key Facts
  - 13.3.2 Business Description
  - 13.3.3 Products and Services
  - 13.3.4 Financial Overview
  - 13.3.5 SWOT Analysis
  - 13.3.6 Key Developments
- 13.4 Herrenknecht AG
  - 13.4.1 Key Facts
  - 13.4.2 Business Description
  - 13.4.3 Products and Services
  - 13.4.4 Financial Overview
  - 13.4.5 SWOT Analysis
  - 13.4.6 Key Developments
- 13.5 Nabors Industries Ltd
  - 13.5.1 Key Facts
  - 13.5.2 Business Description
  - 13.5.3 Products and Services
  - 13.5.4 Financial Overview
  - 13.5.5 SWOT Analysis
  - 13.5.6 Key Developments
- 13.6 Laney Directional Drilling Co
  - 13.6.1 Key Facts
  - 13.6.2 Business Description
  - 13.6.3 Products and Services
  - 13.6.4 Financial Overview
  - 13.6.5 SWOT Analysis
  - 13.6.6 Key Developments
- 13.7 Prime Drilling GmbH
  - 13.7.1 Key Facts
  - 13.7.2 Business Description
  - 13.7.3 Products and Services
  - 13.7.4 Financial Overview
  - 13.7.5 SWOT Analysis
  - 13.7.6 Key Developments
- 13.8 Epiroc AB



13.8.1 Key Facts

13.8.2 Business Description

13.8.3 Products and Services

13.8.4 Financial Overview

13.8.5 SWOT Analysis

13.8.6 Key Developments

13.9 Vermeer Corp

13.9.1 Key Facts

13.9.2 Business Description

13.9.3 Products and Services

13.9.4 Financial Overview

13.9.5 SWOT Analysis

13.9.6 Key Developments

## **14. APPENDIX**

14.1 About The Insight Partners

## List Of Tables

### LIST OF TABLES

Table 1. South & Central America Horizontal Directional Drilling Market Segmentation

Table 2. South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

Table 3. South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million) - by End Use

Table 4. South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million) - by Rig Size

Table 5. South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 6. South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Country

Table 7. Brazil: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by End Use

Table 8. Brazil: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Rig Size

Table 9. Brazil: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Application

Table 10. Argentina: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million) - by End Use

Table 11. Argentina: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Rig Size

Table 12. Argentina: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Application

Table 13. Rest of South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million) - by End Use

Table 14. Rest of South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Rig Size

Table 15. Rest of South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030(US\$ Million) - by Application

## List Of Figures

### LIST OF FIGURES

- Figure 1. South & Central America Horizontal Directional Drilling Market Segmentation, by Country
- Figure 2. Ecosystem Analysis
- Figure 3. South & Central America Horizontal Directional Drilling Market - Key Market Dynamics
- Figure 4. Impact Analysis of Drivers and Restraints
- Figure 5. South & Central America Horizontal Directional Drilling Market Revenue (US\$ Million), 2002-2030
- Figure 6. South & Central America Horizontal Directional Drilling Market Share (%) - by End Use (2022 and 2030)
- Figure 7. Telecommunication: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 8. Oil & Gas: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 9. Sewer and Water: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 10. Environmental Wells: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 11. Utility: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 12. South & Central America Horizontal Directional Drilling Market Share (%) - by Rig Size (2022 and 2030)
- Figure 13. Small (Below 40000 lbs): South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 14. Medium (40000-100000 lbs): South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 15. Large (Above 100000 lbs): South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 16. South & Central America Horizontal Directional Drilling Market Share (%) - by Application (2022 and 2030)
- Figure 17. Onshore: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 18. Offshore: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 19. South & Central America Horizontal Directional Drilling Market, by Key

Countries - Revenue (2022) (US\$ Million)

Figure 20. South & Central America Horizontal Directional Drilling Market Breakdown, by Key Countries, 2022 and 2030 (%)

Figure 21. Brazil: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 22. Argentina: South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 23. Rest of South & Central America Horizontal Directional Drilling Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 24. Company Positioning & Concentration

## I would like to order

Product name: 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)

Product link: <https://marketpublishers.com/r/S7C59BD3A466EN.html>

Price: US\$ 3,550.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S7C59BD3A466EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below  
and fax the completed form to +44 20 7900 3970