

South & Central America Smart Casing Running Tool Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America smart casing running tool market is projected to experience significant growth, with an expected market size of US\$ 226.6 million by 2031, up from US\$ 170.0 million in 2024. This growth translates to a compound annual growth rate (CAGR) of 4.3% from 2025 to 2031, driven by the expansion of the region's refining and upstream oil and gas sectors.

According to the OPEC Annual Statistical Bulletin 2022, refinery capacity in South America has seen a modest increase, rising from 6,618 thousand barrels per day (kb/d) in 2018 to 6,648 kb/d in 2021. This growth is indicative of ongoing investments in midstream infrastructure, particularly in countries like Brazil, Argentina, and Colombia, which are leading the charge with large-scale refinery upgrades and integrated energy projects. In Argentina, significant upstream investments are being funneled into the Vaca Muerta shale formation, recognized as one of the largest unconventional resources globally. Major operators such as YPF, Vista Energy, Shell, and Pluspetrol are aggressively pursuing drilling initiatives, thereby increasing the demand for high-performance smart casing running tools. These tools are designed to enhance productivity while minimizing the need for on-site technicians.

Capital expenditures in major blocks, such as La Calera, are anticipated to exceed US\$ 9 billion through 2027, alongside the development of essential infrastructure like treatment facilities and crude dispatch pipelines. In Colombia, Canadian company NG Energy is advancing gas development at the Sinu-9 and Maria Conchita blocks, with plans for multiple new wells and pipeline installations. These upstream activities are expected to significantly boost the consumption of smart casing running tools through 2025 and beyond. Additionally, Suriname is making strides in offshore energy expansion, with Staatsolie, the national oil company, intensifying efforts to enhance

onshore crude production. This presents new opportunities for the smart casing running tool market, particularly in coastal blocks like Coronie and Uitkijk, which are strategically located near existing production areas.

The South & Central America smart casing running tool market can be segmented by various factors, including hardware, sensor kit type, software, sales channels, aftermarket sales, application, and technology. In 2024, the Head Assembly segment was the market leader in hardware, while the Torque and Tension Sensor segment dominated the sensor kit type category. The Inbuilt software segment also led the market, as did the Direct Sales segment in terms of sales channels. Furthermore, the Service and Rental segment was the most significant in the aftermarket sales category, and the Onshore application segment held the largest share in 2024. In terms of technology, the Fully Automated Casing Running Tool (CRT) segment was the market leader.

The increasing demand for technologies that minimize non-productive time (NPT) in drilling and casing operations is expected to create further opportunities for the smart casing running tool market. These tools facilitate real-time monitoring, automated control, and remote operation, significantly enhancing operational efficiency. By reducing human intervention and enabling proactive decision-making, smart casing running tools help quickly identify and resolve issues such as stuck pipes, improper casing placement, or downhole anomalies—situations that can lead to costly delays. Consequently, oil and gas companies can save substantial time and operational costs, translating to higher rig utilization, reduced risk, and improved safety.

The trend of reducing NPT through digital and smart technologies is becoming increasingly prominent in the oil and gas industry, as companies strive for operational excellence and competitiveness. Industries known for their demand for high operational efficiency, such as automotive and oil, are adopting digital tools that leverage machine learning, big data, and artificial intelligence to identify and eliminate hidden time losses. A notable example in the oil and gas sector is Drillit, a specialized software developed by CNT New Technologies Company, which quantifies invisible NPT-time losses that significantly impact productivity. By analyzing macro and micro operations, Drillit helps identify inefficiencies in routine activities, which can account for up to 30% of productive time.

The integration of intelligent digital platforms like Drillit with smart casing running tools enhances their potential by enabling real-time performance tracking and facilitating remote operations and automated decision-making. This synergy can significantly

reduce NPT during casing operations, similar to how Drillit optimizes drilling processes. As oilfield operators increasingly seek solutions to identify inefficiencies and streamline operations, the demand for smart casing tools is expected to grow, positioning them as a valuable investment.

By country, the South & Central America smart casing running tool market is segmented into Brazil, Argentina, and the Rest of South & Central America, with Brazil holding the largest market share in 2024. The discovery of substantial offshore oil reserves in Brazil has spurred demand for advanced casing running tools, which are essential for ensuring formation stability and drilling efficiency. However, the adoption of these modern tools has been inconsistent due to fluctuating market dynamics. For instance, in May 2025, Petrobras announced the discovery of high-quality, contaminant-free oil in the pre-salt region of the Santos Basin, highlighting the ongoing exploration activities in the region.

Key players in the South & Central 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, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. SMART CASING RUNNING TOOL MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
- 4.4 List of Vendors in the Value Chain
- 4.5 Technology Trends
 - 4.5.1 Manual vs. Automated CRTs
 - 4.5.2 Automated CRT/TRT Systems are Replacing Hydraulic Tongs in Modern Rigs
 - 4.5.2.1 Advancements in Automation
 - 4.5.2.2 Safety and Efficiency Enhancements
 - 4.5.2.3 Cost Implications
 - 4.5.2.4 Industry Adoption and Future Outlook

4.5.3 Top-Drive integration: Automated CRTs and TRTs Connection

4.5.3.1 Overview

4.5.3.2 Strategic Importance of Integration

4.5.3.2.1 Operational Efficiency

4.5.3.2.2 Safety and HSE Improvements

4.5.3.2.3 Cost Management and ROI

4.5.3.2.4 Technology Synergy and Data Integration

4.5.3.3 Case Studies

4.5.3.3.1 Nabors' Automated Casing Drive System (ACDS) Deployment in Colombia

4.5.3.4 Market Implications and Competitive Advantage

4.5.4 Key Companies and their Product Offerings

5. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET - KEY MARKET DYNAMICS

5.1 Market Drivers

5.2 Market Restraints

5.3 Market Opportunities

5.4 Future Trends

5.5 Impact of Drivers and Restraints:

6. SMART CASING RUNNING TOOL MARKET - SOUTH & CENTRAL AMERICA MARKET ANALYSIS

6.1 South & Central America Smart Casing Running Tool Market Revenue (US\$ Million), 2024 - 2031

6.2 South & Central America Smart Casing Running Tool Market Forecast and Analysis

7. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY HARDWARE

7.1 Remote Display

7.1.1 Overview

7.1.2 Remote Display: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Sensor Kit

7.2.1 Overview

7.2.2 Sensor Kit: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Head Assembly

7.3.1 Overview

7.3.2 Head Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.4 Gripping Assembly

7.4.1 Overview

7.4.2 Gripping Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.5 Circulator Assembly

7.5.1 Overview

7.5.2 Circulator Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.6 Power Supply

7.6.1 Overview

7.6.2 Power Supply: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.7 Other Accessories

7.7.1 Overview

7.7.2 Other Accessories: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SENSOR KIT TYPE

8.1 Torque and Tension Sensor

8.1.1 Overview

8.1.2 Torque and Tension Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Position Sensor

8.2.1 Overview

8.2.2 Position Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Data Transmission Sensor

8.3.1 Overview

8.3.2 Data Transmission Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Others

8.4.1 Overview

8.4.2 Others: South & Central America Smart Casing Running Tool Market - Revenue

and Forecast, 2021 - 2031 (US\$ Million)

9. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SOFTWARE

9.1 Inbuilt

9.1.1 Overview

9.1.2 Inbuilt: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Optional

9.2.1 Overview

9.2.2 Optional: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY SALES

10.1 Direct Sales

10.1.1 Overview

10.1.2 Direct Sales: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 Aftermarket

10.2.1 Overview

10.2.2 Aftermarket: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY AFTERMARKET SALES CHANNEL

11.1 Parts and Accessories

11.1.1 Overview

11.1.2 Parts and Accessories: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2 Service and Rental

11.2.1 Overview

11.2.2 Service and Rental: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET

South & Central America Smart Casing Running Tool Market Size and Forecast (2021 - 2031)

REVENUE ANALYSIS - BY APPLICATION

12.1 Onshore

12.1.1 Overview

12.1.2 Onshore: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.2 Offshore

12.2.1 Overview

12.2.2 Offshore: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET REVENUE ANALYSIS - BY TECHNOLOGY

13.1 Fully Automated CRT

13.1.1 Overview

13.1.2 Fully Automated CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13.2 Remotely Operated CRT

13.2.1 Overview

13.2.2 Remotely Operated CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

13.3 Hybrid CRT

13.3.1 Overview

13.3.2 Hybrid CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14. SOUTH & CENTRAL AMERICA SMART CASING RUNNING TOOL MARKET - COUNTRY ANALYSIS

14.1 South & Central America

14.1.1 South & Central America Smart Casing Running Tool Market Revenue and Forecast and Analysis - by Country

14.1.1.1 South & Central America Smart Casing Running Tool Market Revenue and Forecast and Analysis - by Country

14.1.2.2 Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.1.2.2.1 Brazil: South & Central America Smart Casing Running Tool Market Share - by Hardware

14.1.2.2.2 Brazil: South & Central America Smart Casing Running Tool Market Share - by Sensor Kit Type

14.1.2.2.3 Brazil: South & Central America Smart Casing Running Tool Market Share - by Software

14.1.2.2.4 Brazil: South & Central America Smart Casing Running Tool Market Share - by Sales

14.1.2.2.5 Brazil: South & Central America Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.1.2.2.6 Brazil: South & Central America Smart Casing Running Tool Market Share - by Application

14.1.2.2.7 Brazil: South & Central America Smart Casing Running Tool Market Share - by Technology

14.2.3.3 Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.2.3.3.1 Argentina: South & Central America Smart Casing Running Tool Market Share - by Hardware

14.2.3.3.2 Argentina: South & Central America Smart Casing Running Tool Market Share - by Sensor Kit Type

14.2.3.3.3 Argentina: South & Central America Smart Casing Running Tool Market Share - by Software

14.2.3.3.4 Argentina: South & Central America Smart Casing Running Tool Market Share - by Sales

14.2.3.3.5 Argentina: South & Central America Smart Casing Running Tool Market Share - by Aftermarket Sales Channel

14.2.3.3.6 Argentina: South & Central America Smart Casing Running Tool Market Share - by Application

14.2.3.3.7 Argentina: South & Central America Smart Casing Running Tool Market Share - by Technology

14.3.4.4 Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

14.3.4.4.1 Rest of South & Central America: South & Central America Smart Casing Running Tool Market Share - by Hardware

14.3.4.4.2 Rest of South & Central America: South & Central America Smart Casing Running Tool Market Share - by Sensor Kit Type

14.3.4.4.3 Rest of South & Central America: South & Central America Smart Casing Running Tool Market Share - by Software

14.3.4.4.4 Rest of South & Central America: South & Central America Smart Casing Running Tool Market Share - by Sales

14.3.4.4.5 Rest of South & Central America: South & Central America Smart Casing

Running Tool Market Share - by Aftermarket Sales Channel

14.3.4.4.6 Rest of South & Central America: South & Central America Smart Casing

Running Tool Market Share - by Application

14.3.4.4.7 Rest of South & Central America: South & Central America Smart Casing

Running Tool Market Share - by Technology

15 COMPETITIVE LANDSCAPE

15.1 Heat Map Analysis by Key Players

15.2 Company Positioning & Concentration

16 INDUSTRY LANDSCAPE

16.1 Overview

16.2 New Product Development

16.3 Merger and Acquisition

16.4 Other Strategic Developments

17 COMPANY PROFILES

17.1 NOV Inc

17.1.1 Key Facts

17.1.2 Business Description

17.1.3 Products and Services

17.1.4 Financial Overview

17.1.5 SWOT Analysis

17.1.6 Key Developments

17.2 Weatherford International Plc

17.2.1 Key Facts

17.2.2 Business Description

17.2.3 Products and Services

17.2.4 Financial Overview

17.2.5 SWOT Analysis

17.2.6 Key Developments

17.3 McCoy Global Inc.

17.3.1 Key Facts

17.3.2 Business Description

17.3.3 Products and Services

17.3.4 Financial Overview

- 17.3.5 SWOT Analysis
- 17.3.6 Key Developments
- 17.4 Nabors Industries Ltd
 - 17.4.1 Key Facts
 - 17.4.2 Business Description
 - 17.4.3 Products and Services
 - 17.4.4 Financial Overview
 - 17.4.5 SWOT Analysis
 - 17.4.6 Key Developments
- 17.5 Expro Group Holdings NV
 - 17.5.1 Key Facts
 - 17.5.2 Business Description
 - 17.5.3 Products and Services
 - 17.5.4 Financial Overview
 - 17.5.5 SWOT Analysis
 - 17.5.6 Key Developments
- 17.6 Odfjell Technology Ltd
 - 17.6.1 Key Facts
 - 17.6.2 Business Description
 - 17.6.3 Products and Services
 - 17.6.4 Financial Overview
 - 17.6.5 SWOT Analysis
 - 17.6.6 Key Developments
- 17.7 Volant Products
 - 17.7.1 Key Facts
 - 17.7.2 Business Description
 - 17.7.3 Products and Services
 - 17.7.4 Financial Overview
 - 17.7.5 SWOT Analysis
 - 17.7.6 Key Developments
- 17.8 Parker Drilling Company
 - 17.8.1 Key Facts
 - 17.8.2 Business Description
 - 17.8.3 Products and Services
 - 17.8.4 Financial Overview
 - 17.8.5 SWOT Analysis
 - 17.8.6 Key Developments
- 17.9 Premiere, Inc
 - 17.9.1 Key Facts

- 17.9.2 Business Description
- 17.9.3 Products and Services
- 17.9.4 Financial Overview
- 17.9.5 SWOT Analysis
- 17.9.6 Key Developments
- 17.10 Magnum Manufacturing
 - 17.10.1 Key Facts
 - 17.10.2 Business Description
 - 17.10.3 Products and Services
 - 17.10.4 Financial Overview
 - 17.10.5 SWOT Analysis
 - 17.10.6 Key Developments

18. APPENDIX

- 18.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. South & Central America Smart Casing Running Tool Market Segmentation

Table 2. List of Vendors

Table 3. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 5. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 6. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 7. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 8. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 9. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 10. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 11. South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 12. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 13. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 14. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 15. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 16. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 17. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 18. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 19. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 20. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 21. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 22. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 23. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 24. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 25. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 26. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Hardware

Table 27. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sensor Kit Type

Table 28. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Software

Table 29. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Sales

Table 30. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aftermarket Sales Channel

Table 31. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 32. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 33. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. South & Central America Smart Casing Running Tool Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Smart Casing Running Tool Market

Figure 4. South & Central America Smart Casing Running Tool Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. South & Central America Smart Casing Running Tool Market Revenue (US\$ Million), 2024 - 2031

Figure 7. South & Central America Smart Casing Running Tool Market Share (%) - by Hardware, 2024 and 2031

Figure 8. Remote Display: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Sensor Kit: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Head Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Gripping Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Circulator Assembly: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Power Supply: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Other Accessories: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. South & Central America Smart Casing Running Tool Market Share (%) - by Sensor Kit Type, 2024 and 2031

Figure 16. Torque and Tension Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Position Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Data Transmission Sensor: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Others: South & Central America Smart Casing Running Tool Market -

Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. South & Central America Smart Casing Running Tool Market Share (%) - by Software, 2024 and 2031

Figure 21. Inbuilt: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Optional: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. South & Central America Smart Casing Running Tool Market Share (%) - by Sales, 2024 and 2031

Figure 24. Direct Sales: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Aftermarket: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. South & Central America Smart Casing Running Tool Market Share (%) - by Aftermarket Sales Channel, 2024 and 2031

Figure 27. Parts and Accessories: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Service and Rental: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 29. South & Central America Smart Casing Running Tool Market Share (%) - by Application, 2024 and 2031

Figure 30. Onshore: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 31. Offshore: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 32. South & Central America Smart Casing Running Tool Market Share (%) - by Technology, 2024 and 2031

Figure 33. Fully Automated CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 34. Remotely Operated CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 35. Hybrid CRT: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 36. South & Central America Smart Casing Running Tool Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 37. Brazil: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 38. Argentina: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 39. Rest of South & Central America: South & Central America Smart Casing Running Tool Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 40. Company Positioning & Concentration

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