

# South & Central America Wireline Services Market Size and Forecast (2021 - 2031)

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## Abstracts

The Wireline Services Market in South and Central America (SAM) is poised for significant growth, with projections indicating that the market size will escalate from approximately US\$ 2,015.2 million in 2024 to US\$ 3,337.2 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 7.5% from 2025 to 2031, driven by increasing exploration and production (E&P) activities across the region.

### Market Overview

The demand for wireline services in SAM is closely linked to the region's robust E&P activities, particularly in Brazil, which stands out as the largest contributor to this market. The country's extensive offshore developments, especially in deepwater and ultra-deepwater environments, are pivotal in driving the demand for wireline services. Brazil's oil production has seen a remarkable increase, with a reported 12.5% rise in 2023, reaching 3.5 million barrels per day. This surge is largely attributed to the development of subsalt fields on the Atlantic shelf, which utilize floating production, storage, and offloading (FPSO) units. Rystad Energy forecasts that Brazil will account for a significant portion of global FPSO construction orders by 2030, further emphasizing the critical role of wireline services in enhancing production efficiency and ensuring well integrity in complex offshore operations.

### Market Segmentation

The South and Central America Wireline Services Market can be segmented based on various criteria:

**By Type:** The market is divided into Slickline and Electric Line services, with Electric Line services leading the market in 2024.

**By Hole Type:** The segmentation includes Open Hole and Cased Hole, where Cased Hole services dominated in 2024.

By Service Type: This includes Well Completion, Well Intervention, and Well Logging, with Well Logging being the most significant segment in 2024.

By Application: The market is categorized into Onshore and Offshore applications, with Onshore services holding the largest share in 2024.

## Market Dynamics

Government initiatives and private sector investments are crucial in driving the development of new drilling sites and the expansion of existing fields. These investments are essential for maintaining a steady supply of tubular products, which are vital for the wireline services market. Notable investments include:

In March 2025, Shell announced a final investment decision for the Gato do Mato project, a deepwater initiative offshore Brazil, expected to produce 120,000 barrels of oil per day by 2029.

The Ecuadorian government unveiled a Hydrocarbon Sector Investment Plan for 2025-2029, aiming to boost oil and gas production with a total investment of US\$ 41.879 billion.

PetroTal, a Peru-focused firm, plans to increase its production by approximately 24% in 2025, with a capital budget of US\$ 140 million allocated for various development activities.

Petrobras, Brazil's state-owned oil giant, has outlined a multibillion-dollar investment plan for 2025-2029, focusing on oil and natural gas while balancing low-carbon initiatives.

These investments are expected to drive demand for wireline services, including well logging, formation evaluation, and completion support, as operators expand their drilling operations and upgrade aging equipment. The anticipated increase in capital expenditure presents a significant opportunity for the wireline services market to grow, allowing service providers to capitalize on the ongoing expansion of the oil and gas industry.

## Country Insights

Brazil remains the dominant player in the SAM wireline services market, accounting for

the largest share in 2024. The country is recognized as Latin America's leading oil producer, with a staggering 97.6% of its oil production sourced from offshore fields. The National Agency of Petroleum, Natural Gas, and Biofuels (ANP) projects investments exceeding R\$609 billion (approximately US\$ 122 billion) from 2025 to 2029. In 2023, Brazil's average oil production reached 3.4 million barrels per day, with over 90% derived from deepwater fields. The complexity of ultra-deepwater drilling necessitates specialized wireline services to address potential downhole challenges, thereby increasing the demand for advanced technologies and skilled services in the region.

#### Competitive Landscape

Key players in the Wireline Services Market include SLB, Baker Hughes Co, Halliburton Co, and Weatherford International Plc, among others. These companies are actively pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to their clients.

In conclusion, the South and Central America Wireline Services Market is on a robust growth path, driven by significant investments in oil and gas exploration and production. The increasing complexity of offshore operations and the need for advanced wireline technologies will continue to shape the market landscape in the coming years.

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