REPORT OVERVIEW

1.1 OBJECTIVES

- To define, describe, and forecast the global coiled tubing market on the basis of services type and region
- To provide detailed information regarding the major factors influencing the growth of the market (drivers, restraints, opportunities, and industry specific challenges)
- To strategically analyze the coiled tubing market with respect to individual growth trends, future prospects, and contribution to the total market
- To analyze the opportunities in the market for stakeholders and provide details of the competitive landscape for market leaders
- To forecast the revenue of market segments with respect to regions (along with countries), namely, North America, Europe, Asia-Pacific, Latin America, the Middle East, and Africa
- To strategically profile key players and comprehensively analyze their market shares and core competencies
- To track and analyze competitive developments such as joint ventures, mergers and acquisitions, new product developments, and research and developments in the coiled tubing market
1.2 MARKET DEFINITION

Coiled Tubing (CT) is a continuously milled lengthy tubular product spooled onto a take-up reel with key applications in the oil & gas industry. CT refers to a long metal pipe which is spooled on a large reel and is normally 1” to 3.25” in diameter. This is used for intervention in the oil & gas industry and for enhancing the production of mature wells. It is also used for well bore cleanouts, fishing, and so on.

1.3 MARKET SCOPE

- This market study analyzes the CT market size by services types like well intervention, drilling, and others. Others include the services in which CT unit is used such as fishing, fracturing, and inspection.
- The market size is also segmented on the basis of the regions such as North America, South America, Europe, Asia-Pacific, the Middle East, and Africa. Further the geographies are broken down into countries.

1.3.1 MARKETS COVERED

This research report categorizes the CT market into the following segments:

**FIGURE 1  MARKETS COVERED: CT MARKET**

CT Market

By Region
- North America
- Latin America
- Asia-Pacific
- Europe
- Africa
- Middle East

By Services Type
- Well Intervention
- Others

*Others include the services in which CT unit is used like fishing purposes, fracturing, and inspection.*
1.3.2 YEARS

HISTORICAL YEAR  BASE YEAR  ESTIMATED YEAR  PROJECTED YEAR

2013  2014  2015-e  2020-p

1.4 CURRENCY

The currency used in report is U.S. dollars, with the market size indicated only in $million.

- For companies reporting their revenues in U.S. dollars, the revenues were picked from their annual report.
- For companies that reported their revenues in currencies other than U.S. dollars, average annual currency conversion rate was used for the particular year to convert values in U.S. dollars.
- For conversion of various currencies to USD, average historical exchange rates were used according to the year specified. For all historical and current exchange rates required for calculations and currency conversions, OANDA - website was used in this research study.

1.5 LIMITATIONS

This report is limited to three types of services of CT units – Well Intervention services, Drilling services, and others. Others include the services in which CT unit is used such as fishing, fracturing, and inspection.

1.6 STAKEHOLDERS

- Oilfield service companies
- Oil & gas field operators
- National Oil Companies (NOCs)
- Government and research organizations
- Consulting companies of the energy sector
- Oil & gas associations
- Investment banks
2 RESEARCH METHODOLOGY

2.1 INTRODUCTION

This research study has involved the usage of extensive secondary sources: press releases, investment reports, industry white papers, presentations, and other publicly available sources to identify and collect information useful for this extensive, technical, market-oriented, and commercial study of the global CT market. The primary sources are several industry experts from core and related industries and preferred service providers, administrators, solution providers, technology developers, alliances, and standards and regulatory organizations. All primary sources have been interviewed to obtain and verify critical qualitative and quantitative information as well as to assess future prospects.

FIGURE 2 RESEARCH DESIGN

### HISTORICAL DATA FOR THE CT MARKET

- **MARKET DRIVERS:**
  - Redevelopment of mature field wells
  - Reinforcing existing reserves
  - Increasing demand for energy globally

- **MARKET OPPORTUNITIES:**
  - Focus on unconventional reserves
  - Growing demand of well intervention in subsea

- **MERGERS & ACQUISITIONS:** More than 32% share of the total developments in mergers & acquisitions in the last 4 years
- **EXPANSIONS:** Approximately 27.5% share of developments held by expansion in the past 4 years

### MARKET RESTRANTS:
- **MARKET RESTRAINTS:**
  - High market competition
  - Strict government regulations
  - Stringent environmental laws

### WINNING IMPERATIVES:
- **WINNING IMPERATIVES:**
  - Increase in research & development
  - Strategy of geographic expansion in emerging markets

### INFLUENCING FACTORS

- **CHALLENGES:**
  - Lack of experienced technical professionals
  - Increasing length of horizontal wells

- **INDUSTRY TRENDS:**
  - Increasing demand for large diameter coiled tubing
  - Growing focus on unconventional sources of energy

### REGIONAL USAGE PATTERN

### COMPETITIVE LANDSCAPE

### SUPPLY & VALUE CHAIN

Source: MarketsandMarkets Analysis
2.2 MARKET SIZE ESTIMATION

Both, top-down and bottom-up approaches have been used to estimate and validate the size of the global market. The following figure shows an illustrative representation of the overall market size estimation process employed for the purpose of this study.

FIGURE 3  MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

Bottom-up Approach (Segmental Analysis)  Global CT Market

- Total Value of each service market ($Million) = North America (Volume of product segment 1) + Europe (Volume of product segment 2)
- Summation of A x B of all Regions
- Total Value Per Region for Each of the Applications (B)
- Geographical Split of the CT (A)
- Cost of Each Service Related to CT

PRIMARY SOURCES: Demand and Supply Side Experts
SECONDARY SOURCES: Annual Reports, Presentations, Press Releases, Journals, Paid Databases, and MarketsandMarkets Repository

FIGURE 4  MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

Top-down Approach (Segmental Analysis)  Global CT Market

- The Global Market Size is Validated Through Primaries (Demand and Supply Side Experts)
- Total Global CT Market ($Million)
- Percent Split for the Segments of CT Market
- Regional Split
- Regional & Country-wise Market for Each Type & Application

PRIMARY SOURCES: Demand and Supply Side Experts
SECONDARY SOURCES:
- Annual Reports, Presentations, Press Releases, Journals, Paid Databases, and MarketsandMarkets Repository
- Company Websites, Press Releases, and News Articles
2.3 BREAKDOWN OF PRIMARY INTERVIEWS

After arriving at the overall market size from the estimation process explained above, the estimations have then been verified by primary respondents that included industry experts such as CEOs, Vice Presidents, Marketing Directors, and related key executives from companies in the oil & gas industry. The figure below shows the breakdown of such primary interviews by company type, designation, and region.

FIGURE 5 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, & REGION

![Breakdown of primary interviews](image)

Note: *Others include product managers, marketing managers, and sales managers

The tier of the companies are defined on the basis of their total revenue, as of 2013: Tier 1 = >$5 billion, Tier 2 = $1 billion to $5 billion, and Tier 3 = <$1 billion
2.3.1 MARKET BREAKDOWN AND DATA TRIANGULATION

The total market has been split into several segments and sub-segments by various types of classifications, after arriving at the overall market size from the market size estimation process explained above. In order to complete the overall market engineering process and arrive at exact statistics for all the market segments and sub-segments, the data triangulation and market crackdown procedures, which are explained below, have been implemented wherever applicable.

The following figure shows the market breakdown structure and the data triangulation methodology implemented in the market engineering process of making this report.

FIGURE 6 DATA TRIANGULATION METHODOLOGY

Global coiled tubing market is derived by the data triangulation as represented above by using various secondary sources and taking the inputs from the various established players in the coiled tubing market. The insights gathered from the primaries and the data collected from the secondary sources are then analyzed to arrive at the global coiled tubing market.
## 2.4 MARKET SHARE ESTIMATION

### 2.4.1 KEY DATA FROM SECONDARY SOURCES

<table>
<thead>
<tr>
<th>PARAMETERS</th>
<th>SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Size</td>
<td>• Company Financials&lt;br&gt;• Magazines&lt;br&gt;• Journals&lt;br&gt;• Press Releases&lt;br&gt;• Paid Databases&lt;br&gt;• Oil &amp; gas supply and demand data and&lt;br&gt;• Global and regional workover rig counts</td>
</tr>
<tr>
<td>Revenue of Companies</td>
<td>• Annual Reports&lt;br&gt;• Company Websites and&lt;br&gt;• Public Databases</td>
</tr>
<tr>
<td>Qualitative Information (Market Dynamics, Market Trends)</td>
<td>• Company Websites&lt;br&gt;• Annual Reports and&lt;br&gt;• Press Releases</td>
</tr>
</tbody>
</table>

### 2.4.2 KEY DATA FROM PRIMARY SOURCES

<table>
<thead>
<tr>
<th>TYPES</th>
<th>PARAMETERS</th>
<th>ASSUMPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Split</td>
<td>• Overall market and sub-segments in 2014&lt;br&gt;• CAGR of each region in the forecast period (2015–2020)</td>
<td>• Base year for calculation is 2013&lt;br&gt;• Regional market shares had been assumed, which was later confirmed</td>
</tr>
<tr>
<td>Global Market Size</td>
<td>• The global market size for the year 2014&lt;br&gt;• CAGR for the forecast period (2015–2020)</td>
<td>• Base year for calculation is 2013&lt;br&gt;• Market shares for different applications had been assumed, which was later confirmed</td>
</tr>
<tr>
<td>Market Split</td>
<td>• Services (Well Intervention, Drilling, and others)&lt;br&gt;• Geography (North America, South America, Europe, Africa, Asia-Pacific, and the Middle East)&lt;br&gt;• Fleet by operators (Schlumberger, Baker Hughes, Halliburton, and others)</td>
<td>• CT Market, by services&lt;br&gt;• Well Intervention, by region&lt;br&gt;• CT Drilling, by region&lt;br&gt;• Others applications, by region&lt;br&gt;• Well Intervention Services, by types&lt;br&gt;• Well Completions &amp; Mechanical Operations, by region&lt;br&gt;• Well Cleaning &amp; Pumping Operations, by region</td>
</tr>
</tbody>
</table>

*Others include the services in which CT unit is used such as fishing, fracturing, and inspection.*
2.4.2.1 KEY INDUSTRY INSIGHTS

"South America and Africa are the emerging markets in near future, for CT services such as Well Intervention and CT Drilling."

General Manager
Leading coiled tubing service provider company

"The reason for growth of coiled tubing is economies of scale as the cost per unit installed reduces, due to less time of operation and labor cost. CT could be used in any type of wells for production."

Sales Director
Leading oilfield service provider company

"The CT market is expected to grow at a rate of 6-7% in the coming five years. In comparison with the growth rate of oil & gas industry CT market would grow at a higher rate."

President Leading oilfield service provider company

"North America dominates the CT market, even after the decline of oil prices in 2014."

Director Leading oil & gas company

2.4.3 ASSUMPTIONS

PARAMETERS | ASSUMPTIONS
---|---
Cost Trends | Cost trend is assumed to be decreasing over time. Additionally, inflation is not a part of pricing and it has been kept constant throughout the year for calculating the market size.

Future investment trends | Increasing discoveries of shale reserves, would give a boost to the investments in the coiled tubing markets.

Market Share Analysis, by key player | Base year for calculation of market share analysis, by key player, is 2014

Note: The market values have been rounded off till the second decimal. Due to this, there may be a slight difference in the actual total and the total mentioned in the table.
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- INCREASE IN ENERGY DEMAND
- REDEVELOPMENT OF MATURE FIELDS
- SHALE REVOLUTION IN THE U.S.

### 5.3.2 RESTRAINTS

- STRICT GOVERNMENT REGULATIONS
- HIGH MARKET COMPETITION
- DECLINING RIG COUNT

### 5.3.3 OPPORTUNITIES

- FOCUS ON DEEPWATER DRILLING
- DEMAND FOR LARGE DIAMETER COILED TUBING
- EMERGING MARKETS

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- DECLINING OIL PRICES
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<tr>
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<td>TOTAL</td>
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*Others include Bolivia, Colombia, Ecuador, and Peru among other surrounding countries.

*Source: Related Research Publication and MarketsandMarkets Analysis

### TABLE 2  CT ACTIVE FLEET COUNT, BY MAJOR OPERATOR, 2012-2013 (UNITS)

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<td>TOTAL</td>
<td>xx</td>
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*Others consists of the rest of the markets players in the CT market.

*Source: Related Research Publication and MarketsandMarkets Analysis

### TABLE 3  SCHLUMBERGER: CT FLEET COUNT, 2013 – 2014 (UNITS)

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<th>Region</th>
<th>2013</th>
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<td>South America</td>
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<tr>
<td>TOTAL</td>
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*Source: Related Research Publication and MarketsandMarkets Analysis
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