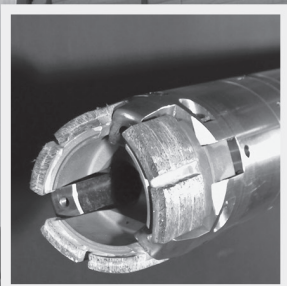




## COILED TUBING MARKET

GLOBAL TRENDS & FORECASTS TO 2020



REPORT CODE  
EP 3441

### COILED TUBING MARKET - GLOBAL TRENDS & FORECASTS TO 2020

By Services {Well Intervention (Well Completion & Well Cleaning) & Drilling},  
Active Fleet & By Region

#### 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.

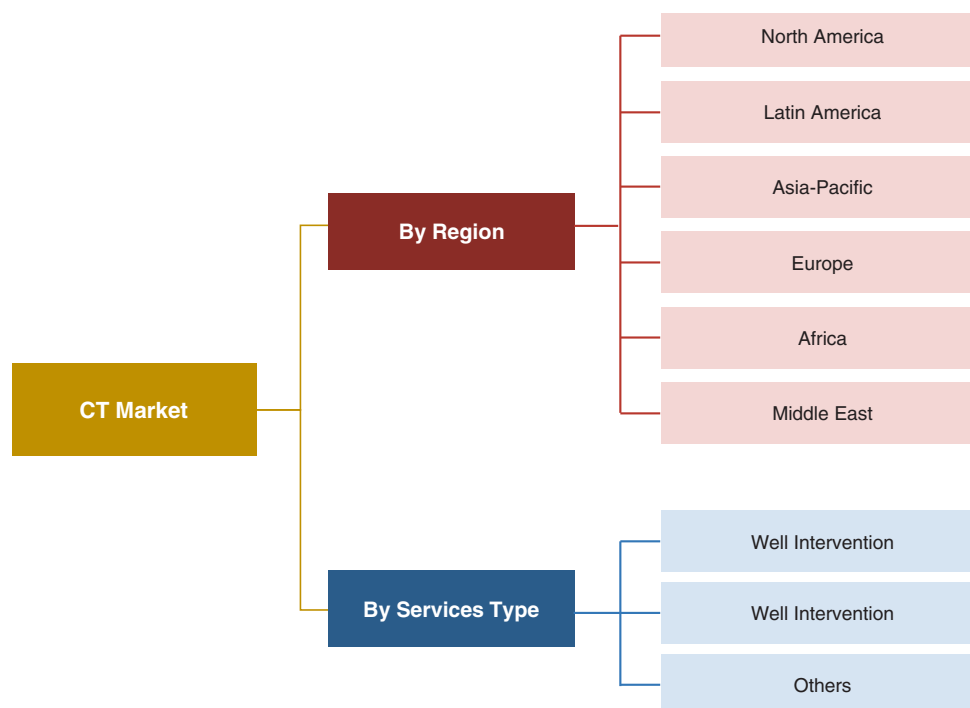
## 1.3 MARKET SCOPE

- 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

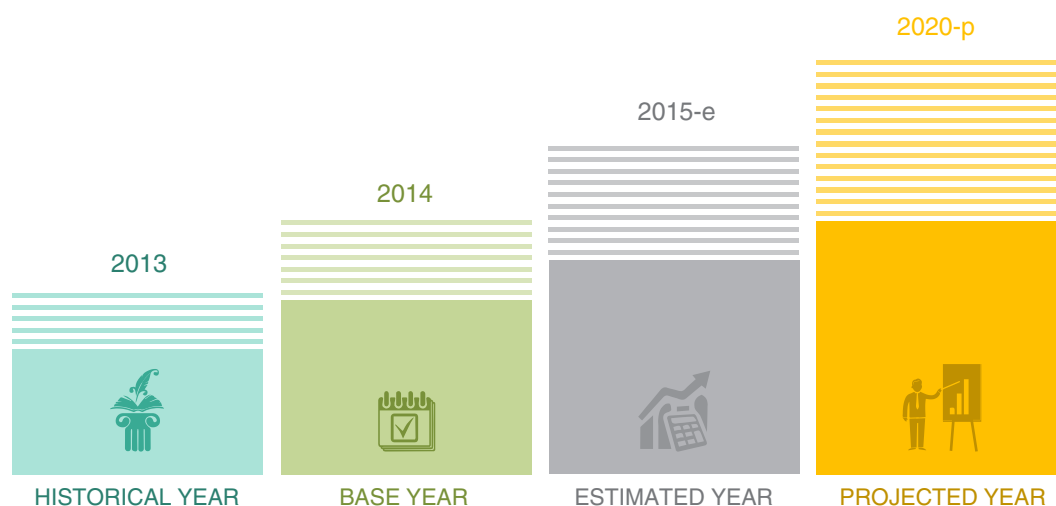
This research report categorizes the CT market into the following segments:

**FIGURE 1**      **MARKETS COVERED: CT MARKET**



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

## 1.3.2 YEARS



## 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

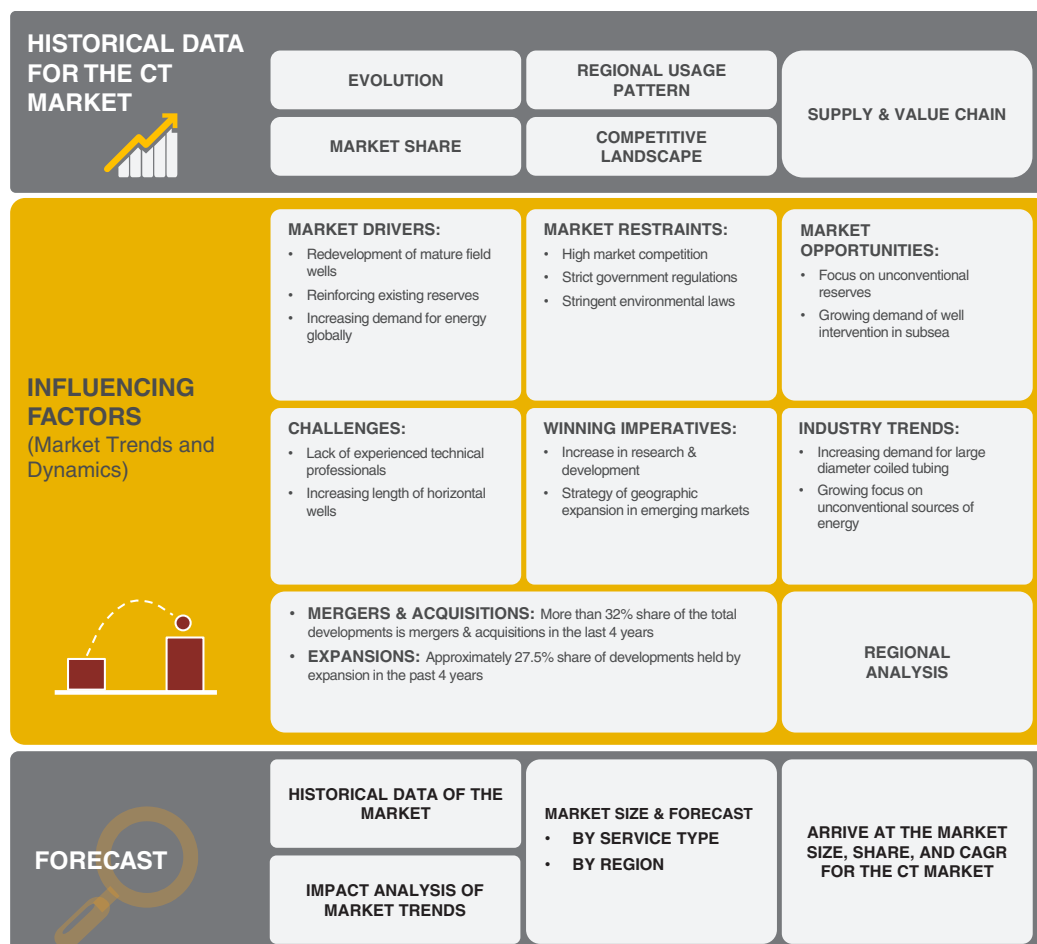


## 2 RESEARCH METHODOLOGY

### 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**

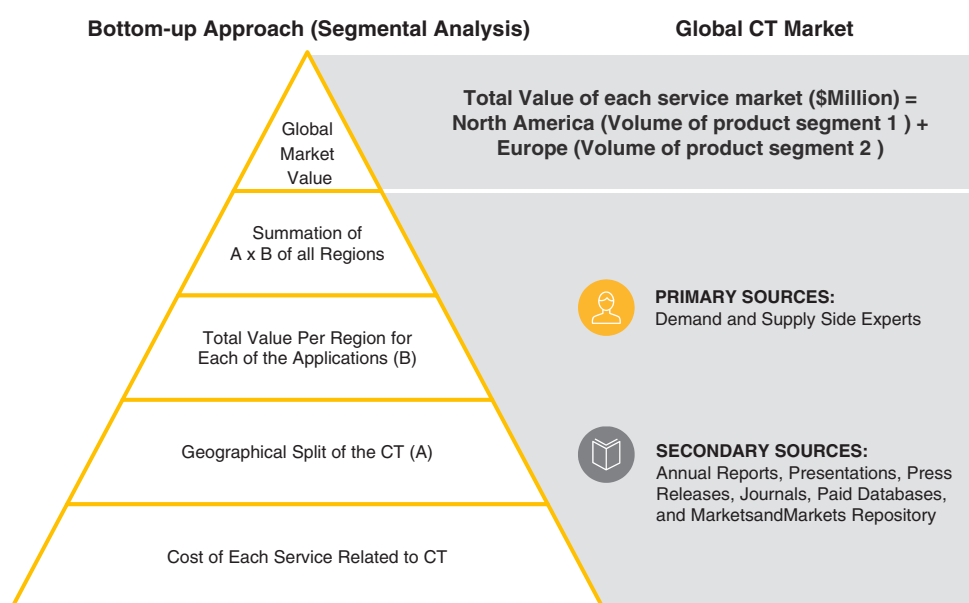


Source: MarketsandMarkets Analysis

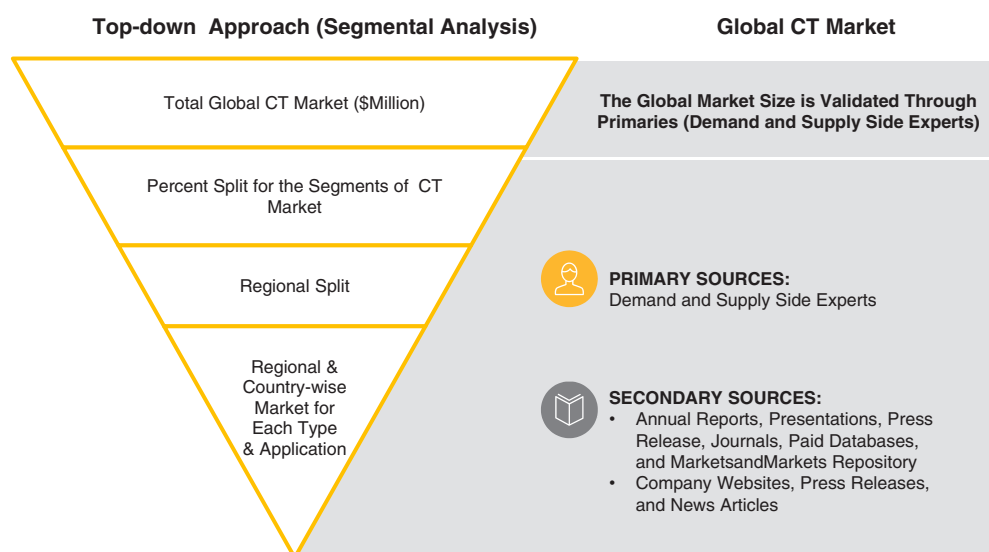
## 2.2 MARKET SIZE ESTIMATION

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**



**FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH**

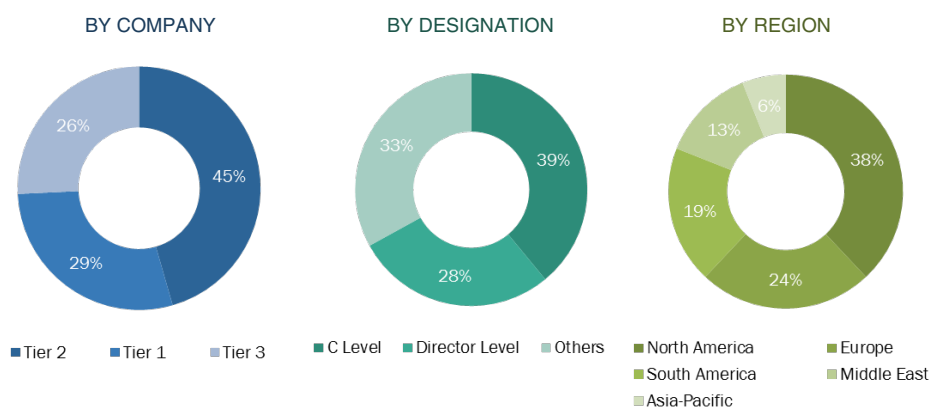




## 2.3 BREAKDOWN OF PRIMARY INTERVIEWS

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**



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

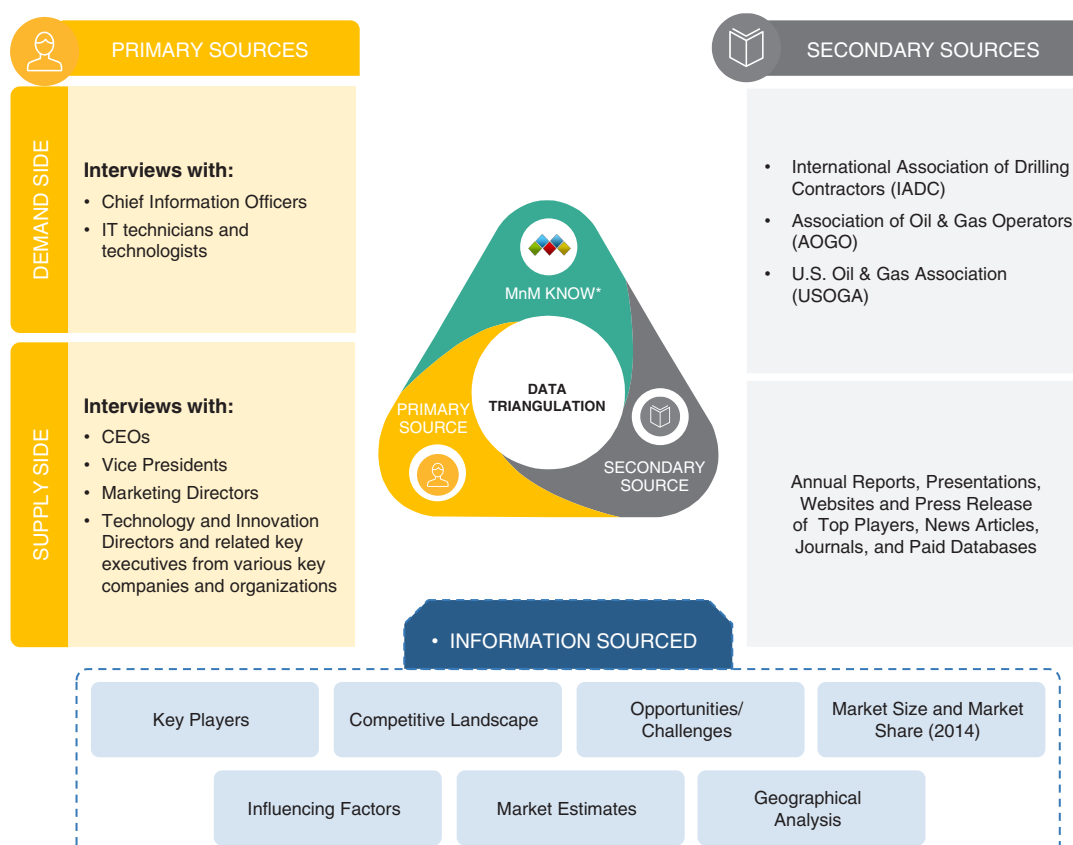
The tier of the companies are defined on the basis of their total revenue, as of 2013: Tier 1 = >\$5 billion, Tier 2 = \$1 billion to \$5 billion, and Tier 3 = <\$1 billion

## 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**



MnM KNOW\* stands for MarketsandMarkets' 'Knowledge Asset Management' framework. In this context, it stands for existing market research knowledge repository of over 5,000 granular markets, our flagship competitive intelligence and market research platform "RT", subject matter experts, and independent consultants. MnM KNOW acts as an independent source that helps us validate information gathered from primary and secondary sources.

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

PARAMETERS	SOURCES
Market Size	<ul style="list-style-type: none"> <li>Company Financials</li> <li>Magazines</li> <li>Journals</li> <li>Press Releases</li> <li>Paid Databases</li> <li>Oil &amp; gas supply and demand data and</li> <li>Global and regional workover rig counts</li> </ul>
Revenue of Companies	<ul style="list-style-type: none"> <li>Annual Reports</li> <li>Company Websites and</li> <li>Public Databases</li> </ul>
Qualitative Information (Market Dynamics, Market Trends)	<ul style="list-style-type: none"> <li>Company Websites</li> <li>Annual Reports and</li> <li>Press Releases</li> </ul>

### 2.4.2 KEY DATA FROM PRIMARY SOURCES

TYPES	PARAMETERS	ASSUMPTIONS
Regional Split	<ul style="list-style-type: none"> <li>Overall market and sub-segments in 2014</li> <li>CAGR of each region in the forecast period (2015–2020)</li> </ul>	<ul style="list-style-type: none"> <li>Base year for calculation is 2013</li> <li>Regional market shares had been assumed, which was later confirmed</li> </ul>
Global Market Size	<ul style="list-style-type: none"> <li>The global market size for the year 2014</li> <li>CAGR for the forecast period (2015–2020)</li> </ul>	<ul style="list-style-type: none"> <li>Base year for calculation is 2013</li> <li>Market shares for different applications had been assumed, which was later confirmed</li> </ul>
Market Split	<ul style="list-style-type: none"> <li>Services (Well Intervention, Drilling, and others)</li> <li>Geography (North America, South America, Europe, Africa, Asia-Pacific, and the Middle East)</li> <li>Fleet by operators (Schlumberger, Baker Hughes, Halliburton, and others)</li> </ul>	<ul style="list-style-type: none"> <li>CT Market, by services</li> <li>Well Intervention, by region</li> <li>CT Drilling, by region</li> <li>Others applications, by region</li> <li>Well Intervention Services, by types</li> <li>Well Completions &amp; Mechanical Operations, by region</li> <li>Well Cleaning &amp; Pumping Operations, by region</li> </ul>

Others include the services in which CT unit is used such as fishing, fracturing, and inspection.





### 2.4.2.1 KEY INDUSTRY INSIGHTS



### 2.4.3 ASSUMPTIONS

PARAMETERS	ASSUMPTIONS
<b>Cost Trends</b>	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.
<b>Future investment trends</b>	Increasing discoveries of shale reserves, would give a boost to the investments in the coiled tubing markets.
<b>Market Share Analysis, by key player</b>	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.

<b>1</b>	<b>INTRODUCTION .....</b>	<b>14</b>
1.1	OBJECTIVES.....	14
1.2	MARKET DEFINITION .....	14
1.3	MARKET SCOPE.....	14
1.3.1	MARKETS COVERED.....	15
1.3.2	YEARS.....	15
1.4	CURRENCY .....	16
1.5	LIMITATIONS.....	16
1.6	STAKEHOLDERS.....	16
<b>2</b>	<b>RESEARCH METHODOLOGY.....</b>	<b>17</b>
2.1	INTRODUCTION .....	17
2.2	MARKET SIZE ESTIMATION .....	18
2.3	BREAKDOWN OF PRIMARY INTERVIEWS.....	19
2.3.1	MARKET BREAKDOWN AND DATA TRIANGULATION .....	20
2.4	MARKET SHARE ESTIMATION .....	21
2.4.1	KEY DATA FROM SECONDARY SOURCES.....	21
2.4.2	KEY DATA FROM PRIMARY SOURCES .....	22
2.4.2.1	KEY INDUSTRY INSIGHTS.....	23
2.4.3	ASSUMPTIONS.....	24
<b>3</b>	<b>EXECUTIVE SUMMARY.....</b>	<b>25</b>
<b>4</b>	<b>PREMIUM INSIGHTS .....</b>	<b>29</b>
4.1	ATTRACTIVE MARKET OPPORTUNITIES IN THE CT MARKET .....	29
4.2	GLOBAL CT MARKET – SERVICE SEGMENT .....	30
4.3	AFRICA CT MARKET .....	31
4.4	GLOBAL CT MARKET, 2015-2020 .....	32
4.5	GLOBAL CT MARKET, BY SERVICE.....	33
4.6	WELL INTERVENTION MARKET, DEVELOPED VS. DEVELOPING NATIONS.....	34
4.7	WELL INTERVENTION SERVICES ALSO LEAD THE MARKET IN AFRICA.....	35

<b>5</b>	<b>MARKET OVERVIEW .....</b>	<b>36</b>
5.1	INTRODUCTION .....	37
5.2	COILED TUBING MARKET SEGMENTATION.....	38
5.2.1	COILED TUBING MARKET, BY SERVICE TYPE.....	38
5.2.2	COILED TUBING, BY REGION .....	39
5.3	MARKET DYNAMICS.....	40
5.3.1	DRIVERS .....	41
5.3.1.1	INCREASE IN ENERGY DEMAND .....	41
5.3.1.2	REDEVELOPMENT OF MATURE FIELDS.....	41
5.3.1.3	SHAPE REVOLUTION IN THE U.S.....	42
5.3.2	RESTRAINTS .....	42
5.3.2.1	STRICT GOVERNMENT REGULATIONS .....	42
5.3.2.2	HIGH MARKET COMPETITION.....	42
5.3.2.3	DECLINING RIG COUNT.....	43
5.3.3	OPPORTUNITIES.....	44
5.3.3.1	FOCUS ON DEEPWATER DRILLING .....	44
5.3.3.2	DEMAND FOR LARGE DIAMETER COILED TUBING .....	44
5.3.3.3	EMERGING MARKETS.....	44
5.3.4	CHALLENGES .....	44
5.3.4.1	DECLINING OIL PRICES.....	44
5.3.4.2	INCREASING LENGTH OF HORIZONTAL WELLS .....	44
<b>6</b>	<b>INDUSTRY TRENDS.....</b>	<b>45</b>
6.1	INTRODUCTION .....	45
6.2	SUPPLY CHAIN ANALYSIS.....	45
6.3	PORTER'S FIVE FORCES ANALYSIS.....	46
6.3.1	THREAT OF NEW ENTRANTS .....	47
6.3.2	THREAT OF SUBSTITUTES.....	47
6.3.3	BARGAINING POWER OF SUPPLIERS .....	47
6.3.4	BARGAINING POWER OF BUYERS.....	48
6.3.5	DEGREE OF COMPETITION.....	48

<b>7</b>	<b>CT MARKET, BY ACTIVE FLEET .....</b>	<b>49</b>
7.1	BY REGION .....	50
7.1.1	ASIA-PACIFIC .....	51
7.1.2	EUROPE .....	52
7.1.3	MIDDLE EAST .....	52
7.1.4	AFRICA.....	53
7.1.5	NORTH AMERICA.....	53
7.1.6	SOUTH AMERICA.....	54
7.2	BY OPERATORS.....	54
7.2.1	INTRODUCTION .....	54
7.2.2	SCHLUMBERGER LIMITED .....	55
7.2.3	HALLIBURTON COMPANY .....	57
7.2.4	BAKER HUGHES INC.....	59
<b>8</b>	<b>CT MARKET, BY SERVICES .....</b>	<b>62</b>
8.1	INTRODUCTION .....	63
8.2	BY SERVICE .....	63
8.2.1	WELL INTERVENTION SERVICES, BY REGION .....	64
8.2.1.1	NORTH AMERICA.....	65
8.2.1.2	EUROPE .....	66
8.2.1.3	ASIA-PACIFIC .....	67
8.2.1.4	MIDDLE EAST .....	68
8.2.1.5	SOUTH AMERICA.....	69
8.2.1.6	AFRICA.....	70
8.2.2	WELL INTERVENTION SERVICES, BY TYPE.....	71
8.2.2.1	WELL CLEANING & PUMPING OPERATIONS MARKET, BY REGION .....	72
8.2.2.2	WELL COMPLETIONS & MECHANICAL OPERATIONS MARKET, BY REGION .....	73
8.2.3	CT WELL INTERVENTION SERVICES MAREKT, BY REGION .....	74
8.2.3.1	NORTH AMERICA.....	74
8.2.3.2	EUROPE .....	75
8.2.3.3	ASIA-PACIFIC .....	75

8.2.3.4	MIDDLE EAST .....	76
8.2.3.5	SOUTH AMERICA.....	77
8.2.3.6	AFRICA.....	77
8.2.4	CT DRILLING MARKET, BY REGION.....	78
8.2.4.1	NORTH AMERICA.....	79
8.2.4.2	EUROPE .....	79
8.2.4.3	MIDDLE EAST .....	80
8.2.4.4	SOUTH AMERICA.....	81
8.2.4.5	AFRICA.....	81
8.2.5	CT OTHER SERVICES MARKET, BY REGION.....	82
8.2.5.1	NORTH AMERICA.....	83
8.2.5.2	EUROPE .....	83
8.2.5.3	ASIA-PACIFIC .....	84
8.2.5.4	MIDDLE EAST .....	85
8.2.5.5	SOUTH AMERICA.....	86
8.2.5.6	AFRICA.....	87
<b>9</b>	<b>CT MARKET, BY REGION .....</b>	<b>88</b>
9.1	INTRODUCTION .....	89
9.2	NORTH AMERICA.....	91
9.2.1	NORTH AMERICA CT MARKET, BY COUNTRY.....	91
9.2.2	NORTH AMERICA CT MARKET, BY SERVICES TYPES.....	92
9.2.2.1	U.S. ....	92
9.2.2.2	CANADA.....	93
9.2.2.3	MEXICO .....	94
9.3	EUROPE.....	95
9.3.1	EUROPE: CT MARKET, BY COUNTRY .....	95
9.3.2	EUROPE: CT MARKET, BY SERVICE TYPES.....	96
9.3.2.1	RUSSIA .....	97
9.3.2.2	U.K. ....	97
9.3.2.3	UKRAINE, POLAND, NORWAY, THE NETHERLANDS, ROMANIA, & CROATIA .....	98
9.3.2.4	REST OF EUROPE .....	98



9.4	ASIA-PACIFIC.....	99
9.4.1	ASIA-PACIFIC:CT MARKET BY COUNTRY .....	99
9.4.2	ASIA-PACIFIC: CT MARKET, BY SERVICES TYPES .....	100
9.4.2.1	CHINA .....	100
9.4.2.2	INDIA.....	101
9.4.2.3	KAZAKHSTAN.....	101
9.4.2.4	AUSTRALIA .....	102
9.4.2.5	INDONESIA, PAKISTAN, AZERBAIJAN, BRUNEI, TURKMENISTAN, & UZBEKISTAN.....	103
9.4.2.6	FAR EAST & OTHERS.....	103
9.5	MIDDLE EAST .....	104
9.5.1	MIDDLE EAST: CT MARKET, BY COUNTRY .....	104
9.5.2	MIDDLE EAST: CT MARKET, BY SERVICES TYPES.....	105
9.5.2.1	SAUDI ARABIA .....	105
9.5.2.2	UAE .....	106
9.5.2.3	KUWAIT.....	107
9.5.2.4	IRAQ, OMAN, & QATAR.....	107
9.5.2.5	REST OF MIDDLE EAST .....	108
9.6	SOUTH AMERICA.....	108
9.6.1	SOUTH AMERICA: CT MARKET, BY COUNTRY.....	108
9.6.2	SOUTH AMERICA: CT MARKET, BY SERVICES TYPES.....	109
9.6.2.1	BRAZIL .....	109
9.6.2.2	VENEZUELA .....	110
9.6.2.3	ARGENTINA.....	111
9.6.2.4	REST OF SOUTH AMERICA.....	111
9.7	AFRICA.....	112
9.7.1	AFRICA: CT MARKET, BY COUNTRY.....	112
9.7.2	AFRICA: CT MARKET, BY SERVICES TYPES.....	113
9.7.2.1	ALGERIA.....	113
9.7.2.2	EGYPT.....	114

9.7.2.3	NIGERIA, ANGOLA, & LIBYA .....	115
9.7.2.4	WEST AFRICA, TUNISIA, SYRIA, CONGO, & GABON .....	115
9.7.2.5	REST OF AFRICA.....	116

## 10 COMPETITIVE LANDSCAPE ..... 117

10.1	OVERVIEW.....	118
10.2	ANALYSIS OF MARKET DEVELOPMENTS.....	120
10.3	COMPETITIVE SITUATION & TRENDS .....	121
10.4	MERGERS & ACQUISITIONS.....	122
10.5	EXPANSIONS.....	123
10.6	CONTRACTS & AGREEMENTS.....	123
10.7	NEW PRODUCT DEVELOPMENTS .....	124

## 11 COMPANY PROFILES..... 125

*(Company at a Glance, Recent Financials, Products & Services, Strategies & Insights, Recent Developments & SWOT Analysis)\**

11.1	INTRODUCTION .....	125
11.2	BAKER HUGHES.....	126
11.3	HALLIBURTON CO. ....	129
11.4	NABORS INDUSTRIES LTD.....	132
11.6	SUPERIOR ENERGY SERVICES INC. ....	138
11.7	WEATHERFORD INTERNATIONAL LTD. ....	141
11.8	ARCHER LIMITED.....	144
11.9	C&J ENERGY SERVICES, INC. ....	146
11.10	CALFRAC WELL SERVICES LTD. ....	148
11.12	RPC, INC. ....	152
11.13	TRICAN.....	154
11.14	SANJEL CORPORATION.....	156

*\*Details on company at a glance, recent financials, products & services, strategies & insights, & recent developments might not be captured in case of unlisted companies.*



12	APPENDIX.....	158
12.1	INSIGHTS OF INDUSTRY EXPERTS .....	158
12.2	DISCUSSION GUIDE .....	158
12.3	INTRODUCING RT: REAL TIME MARKET INTELLIGENCE.....	161
12.4	AVAILABLE CUSTOMIZATIONS .....	162
12.5	RELATED REPORTS.....	163

# LIST OF TABLES

TABLE 1	TOP COUNTRIES WITH TECHNICALLY RECOVERABLE SHALE RESERVES IN 2014.....	42
TABLE 2	CT ACTIVE FLEET COUNT, BY REGION, 2013 – 2014 (UNITS).....	51
TABLE 3	ASIA-PACIFIC: CT ACTIVE FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	51
TABLE 4	EUROPE: CT FLEET COUNT, 2013 – 2014 (UNITS).....	52
TABLE 5	MIDDLE EAST: CT FLEET COUNT, 2013 – 2014 (UNITS).....	52
TABLE 6	AFRICA: CT FLEET COUNT, 2013 – 2014 (UNITS).....	53
TABLE 7	NORTH AMERICA: CT FLEET COUNT, 2013 – 2014, (UNITS).....	53
TABLE 8	SOUTH AMERICA: CT FLEET COUNT, 2013 – 2014 (UNITS).....	54
TABLE 9	CT ACTIVE FLEET COUNT, BY MAJOR OPERATOR, 2012-2013 (UNITS).....	55
TABLE 10	SCHLUMBERGER: CT FLEET COUNT, 2013 – 2014 (UNITS).....	55
TABLE 11	SCHLUMBERGER: ASIA-PACIFIC CT FLEET COUNT, , BY COUNTRY, 2013 – 2014 (UNITS).....	55
TABLE 12	SCHLUMBERGER: MIDDLE EAST CT FLEET COUNT, BY COUNTRY, 2012 – 2013 (UNITS).....	56
TABLE 13	SCHLUMBERGER: AFRICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	56
TABLE 14	SCHLUMBERGER: NORTH AMERICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	56
TABLE 15	SCHLUMBERGER: SOUTH AMERICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	57
TABLE 16	HALLIBURTON: CT FLEET COUNT, BY REGION, 2013–2014 (UNITS).....	57
TABLE 17	HALLIBURTON: ASIA-PACIFIC CT FLEET COUNT, BY COUNTRY 2013–2014 (UNITS).....	57
TABLE 18	HALLIBURTON: MIDDLE EAST CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	58
TABLE 19	HALLIBURTON: EUROPE CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	58
TABLE 20	HALLIBURTON: AFRICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	58
TABLE 21	HALLIBURTON: NORTH AMERICA CT FLEET COUNT, BY COUNTRY 2013 – 2014 (UNITS).....	58
TABLE 22	HALLIBURTON: SOUTH AMERICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	59
TABLE 23	BAKER HUGHES: GLOBAL COILED TUBING FLEET COUNT, 2013 – 2014 (UNITS).....	59
TABLE 24	BAKER HUGHES: ASIA-PACIFIC CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	59
TABLE 25	BAKER HUGHES: MIDDLE EAST CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	60
TABLE 26	BAKER HUGHES: EUROPE CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	60
TABLE 27	BAKER HUGHES: AFRICA CT FLEET COUNT, BY COUNTRY, 2013 – 2014 (UNITS).....	60
TABLE 28	BAKER HUGHES: NORTH AMERICA CT FLEET, BY COUNTRY, 2013 – 2014 (UNITS).....	61
TABLE 29	BAKER HUGHES: SOUTH AMERICA CT FLEET, BY COUNTRY, 2013 – 2014 (UNITS).....	61
TABLE 30	CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	64



## LIST OF TABLES

TABLE 31	WELL INTERVENTION MARKET SIZE, BY REGION, 2013-2020 (\$MILLION) .....	64
TABLE 32	NORTH AMERICA: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	65
TABLE 33	EUROPE: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	66
TABLE 34	ASIA-PACIFIC: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	67
TABLE 35	MIDDLE EAST: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	68
TABLE 36	SOUTH AMERICA: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	69
TABLE 37	AFRICA: WELL INTERVENTION MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	70
TABLE 38	WELL CLEANING & PUMPING OPERATIONS MARKET SIZE, BY REGION, 2013-2020 (\$ MILLION) .....	72
TABLE 39	WELL COMPLETIONS & MECHANICAL OPERATIONS MARKET SIZE, BY REGION, 2013-2020 (\$MILLION) .....	73
TABLE 40	NORTH AMERICA: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	74
TABLE 41	EUROPE: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	75
TABLE 42	ASIA-PACIFIC: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	75
TABLE 43	MIDDLE EAST: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	76
TABLE 44	SOUTH AMERICA: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	77
TABLE 45	AFRICA: WELL INTERVENTION MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	77
TABLE 46	CT DRILLING MARKET SIZE, BY REGION, 2013 – 2020 (\$MILLION) .....	78
TABLE 47	NORTH AMERICA: CT DRILLING MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	79
TABLE 48	EUROPE: CT DRILLING MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	79
TABLE 49	MIDDLE EAST: CT DRILLING MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	80
TABLE 50	SOUTH AMERICA: CT DRILLING MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	81
TABLE 51	AFRICA: CT DRILLING MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	81
TABLE 52	CT OTHER SERVICES MARKET SIZE, BY REGION, 2013 – 2020 (\$MILLION) .....	82
TABLE 53	NORTH AMERICA: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	83
TABLE 54	EUROPE: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	83
TABLE 55	ASIA-PACIFIC: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	84
TABLE 56	MIDDLE EAST: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	85
TABLE 57	SOUTH AMERICA: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	86
TABLE 58	AFRICA: CT OTHER SERVICES MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	87
TABLE 59	CT MARKET SIZE, BY REGION, 2013-2020 (\$MILLION) .....	90
TABLE 60	NORTH AMERICA: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	91





## LIST OF TABLES

TABLE 61	NORTH AMERICA: COILED TUBING MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	92
TABLE 62	U.S.: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	92
TABLE 63	CANADA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	93
TABLE 64	MEXICO: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	94
TABLE 65	EUROPE: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	95
TABLE 66	EUROPE: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	96
TABLE 67	RUSSIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	97
TABLE 68	U.K.: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	97
TABLE 69	UKRAINE, POLAND, NORWAY, THE NETHERLANDS, ROMANIA, & CROATIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	98
TABLE 70	REST OF EUROPE: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	98
TABLE 71	ASIA-PACIFIC: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	99
TABLE 72	ASIA-PACIFIC: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	100
TABLE 73	CHINA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	100
TABLE 74	INDIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	101
TABLE 75	KAZAKHSTAN: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	101
TABLE 76	AUSTRALIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	102
TABLE 77	INDONESIA, PAKISTAN, AZERBAIJAN, BRUNEI, TURKMENISTAN, UZBEKISTAN: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	103
TABLE 78	FAR EAST & OTHERS: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	103
TABLE 79	MIDDLE EAST: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	104
TABLE 80	MIDDLE EAST: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	105
TABLE 81	SAUDI ARABIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	105
TABLE 82	UAE: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	106
TABLE 83	KUWAIT: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	107
TABLE 84	IRAQ, OMAN, & QATAR: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	107
TABLE 85	REST OF MIDDLE EAST: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	108
TABLE 86	SOUTH AMERICA: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	108
TABLE 87	SOUTH AMERICA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	109
TABLE 88	BRAZIL: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	109
TABLE 89	VENEZUELA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	110



## LIST OF TABLES

TABLE 90	ARGENTINA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	111
TABLE 91	REST OF SOUTH AMERICA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	111
TABLE 92	AFRICA: CT MARKET SIZE, BY COUNTRY, 2013-2020 (\$MILLION) .....	112
TABLE 93	AFRICA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	113
TABLE 94	ALGERIA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	113
TABLE 95	EGYPT: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	114
TABLE 96	NIGERIA, ANGOLA, & LIBYA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION) .....	115
TABLE 97	WEST AFRICA, TUNISIA, SYRIA, CONGO, & GABON: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	115
TABLE 98	REST OF AFRICA: CT MARKET SIZE, BY SERVICE, 2013-2020 (\$MILLION).....	116
TABLE 99	MERGERS & ACQUISITIONS, 2014-2015 .....	122
TABLE 100	EXPANSION, 2014.....	123
TABLE 101	CONTRACTS & AGREEMENTS, 2014 .....	123

# LIST OF FIGURES

FIGURE 1	MARKETS COVERED: CT MARKET .....	15
FIGURE 2	RESEARCH DESIGN .....	17
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH .....	18
FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH .....	18
FIGURE 5	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, & REGION .....	19
FIGURE 6	DATA TRIANGULATION METHODOLOGY .....	20
FIGURE 7	CT MARKET SNAPSHOT (2015 VS 2020): MIDDLE EAST IS EXPECTED TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD .....	25
FIGURE 8	WELL INTERVENTION IS THE BIGGEST MARKET FOR CT APPLICATIONS .....	26
FIGURE 9	GLOBAL CT MARKET SIZE, BY SERVICES TYPE, 2015-2020 (\$MILLION) .....	26
FIGURE 10	GLOBAL CT MARKET SHARE, 2014* .....	27
FIGURE 11	AFRICA TO GROW AT A FAST PACE DURING THE NEXT FIVE YEARS .....	28
FIGURE 12	EMERGING ECONOMIES PRESENT PROMISING MARKETS .....	29
FIGURE 13	THE DRILLING SEGMENT IS EXPECTED TO GROW AT THE HIGHEST RATE DURING THE FORECAST PERIOD .....	30
FIGURE 14	WELL INTERVENTION SERVICES MARKET HOLDS MAJOR SHARE IN AFRICA .....	31
FIGURE 15	NORTH AMERICA WILL REMAIN A MATURE MARKET DURING THE FORECAST PERIOD .....	32
FIGURE 16	NORTH AMERICA IS EXPECTED TO REMAIN DOMINANT TILL 2020 .....	33
FIGURE 17	DEVELOPING MARKETS TO GROW TWO TIMES FASTER THAN DEVELOPED MARKETS .....	34
FIGURE 18	DISCOVERIES IN NIGERIA, ANGOLA, & LIBYA TO BOOST THE MARKET .....	35
FIGURE 19	COILED TUBING MARKET SEGMENTATION: BY SERVICE TYPE, BY REGION .....	38
FIGURE 20	MARKET SEGMENTATION: BY SERVICE TYPE .....	38
FIGURE 21	MARKET SEGMENTATION: BY REGION .....	39
FIGURE 22	COILED TUBING MARKET DYNAMICS .....	40
FIGURE 23	TOP TEN ENERGY CONSUMING NATIONS, 2013 (MTOE) .....	41
FIGURE 24	RIG COUNT, BY REGION .....	43
FIGURE 25	CT MARKET: SUPPLY CHAIN ANALYSIS .....	45
FIGURE 26	PORTER'S FIVE FORCES ANALYSIS: CT MARKET .....	46
FIGURE 27	GLOBAL CT ACTIVE FLEET: MARKET SHARE (VOLUME), BY REGION, 2014 .....	50
FIGURE 28	CT MARKET SIZE: BY SERVICE, 2015-2020 (\$MILLION) .....	63

FIGURE 29	WELL INTERVENTION MARKET SIZE, BY TYPE, 2015-2020 (\$MILLION).....	71
FIGURE 30	REGIONAL SNAPSHOT (2014) - GROWING MARKETS ARE EMERGING AS NEW HOT SPOTS.....	89
FIGURE 31	MIDDLE EAST IS EXPECTED TO THE GROW AT THE FASTEST PACE .....	90
FIGURE 32	COMPANIES ADOPTED MERGERS & ACQUISITIONS AS THE KEY GROWTH STRATEGY, 2011 – 2014 .....	118
FIGURE 33	SCHLUMBERGER LTD. GREW AT THE HIGHEST RATE FROM 2011 TO 2014 .....	119
FIGURE 34	CT MARKET SHARE ANALYSIS OF TOP COMPANIES, BY DEVELOPMENT ANALYSIS, 2011 - 2014.....	120
FIGURE 35	MARKET EVALUATION FRAMEWORK .....	121
FIGURE 36	BATTLE FOR MARKET SHARE: MERGERS & ACQUISITIONS IS THE KEY STRATEGY .....	121
FIGURE 37	REGIONAL REVENUE MIX OF TOP 5 MARKET PLAYERS.....	125
FIGURE 38	BAKER HUGHES: COMPANY SNAPSHOT .....	126
FIGURE 39	HALLIBURTON CO.: COMPANY SNAPSHOT .....	129
FIGURE 40	NABORS INDUSTRIES: COMPANY SNAPSHOT .....	132
FIGURE 41	SCHLUMBERGER LTD.: COMPANY SNAPSHOT.....	135
FIGURE 42	SUPERIOR ENERGY SERVICES INC.: COMPANY SNAPSHOT .....	138
FIGURE 43	WEATHERFORD INTERNATIONAL: COMPANY SNAPSHOT .....	141
FIGURE 44	ARCHER LIMITED: COMPANY SNAPSHOT.....	144
FIGURE 45	C&J ENERGY SERVICES, INC.: COMPANY SNAPSHOT .....	146
FIGURE 46	CALFRAC WELL SERVICES LTD.: COMPANY SNAPSHOT .....	148
FIGURE 48	RPC, INC.: COMPANY SNAPSHOT .....	152
FIGURE 49	TRICAN: COMPANY SNAPSHOT.....	154

TABLE 1 NORTH AMERICA: CT FLEET COUNT, 2013 – 2014, (UNITS)

Country	2013	2014	CAGR (2013–2014)
Brazil	XX	XX	XX
Venezuela	XX	XX	XX
Argentina	XX	XX	XX
Others	XX	XX	XX
<b>TOTAL</b>	<b>XX</b>	<b>XX</b>	<b>XX</b>

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)

Operator	2013	2014	CAGR (2013–2014)
Schlumberger Limited	XX	XX	XX
Halliburton Company	XX	XX	XX
Baker Hughes Inc.	XX	XX	XX
Others	XX	XX	XX
<b>TOTAL</b>	<b>XX</b>	<b>XX</b>	<b>XX</b>

\*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)

Region	2013	2014	CAGR (xxxx–xxxx)
Asia-Pacific	XX	XX	XX
Middle East	XX	XX	XX
Africa	XX	XX	XX
North America	XX	XX	XX
South America	XX	XX	XX
<b>TOTAL</b>	<b>XX</b>	<b>XX</b>	<b>XX</b>

Source: Related Research Publication and MarketsandMarkets Analysis

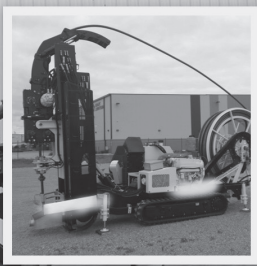




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