

# OILFIELD SERVICES MARKET SHARE REPORT



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**March, 2017**

## INTRODUCTION

This report presents the results of in-depth, personal interviews with decision makers with oil & gas operators worldwide who purchase and use oilfield services. The report assesses market share for 74 oilfield product and services used by the oil and gas operators worldwide. Market share data is provided for all oilfield service suppliers worldwide including the major oilfield service suppliers such as Schlumberger, Halliburton, Baker Hughes, GE Oil & Gas, National Oilwell Varco and over 700 smaller independent oilfield service suppliers.

Market share data is based on personal interviews with 3,059 respondents worldwide representing over 500 oil and gas operating companies. The respondents provided expenditures for the 74 product and service lines used in 2016 with their respective oilfield service suppliers.

Each respondent interviewed was pre-qualified for the product category evaluated, the interviews were conducted person to person via phone and lasted approximately 30 to 45 minutes on average. Geologist, Geophysicists, Drilling Engineers, Drilling Managers, Completion Engineers, Completion Managers, Production Engineers, Production Managers, Operations Managers, Intervention Managers, Subsea Engineers, Subsea Operations and Asset Managers were interviewed for their respective area of responsibility.

Kimberlite provides the market share for each of the oilfield service suppliers worldwide and the market share data is presented by product line and additionally segmented by geographic region, oil & gas operator type (major oil company, national oil company, independent oil company) and by major product category (G&G/formation evaluation, drilling, completion, production and subsea).

The report is supported with an interactive database that is available for additional purchase and allows users to perform customized analysis and evaluation by region, customer group or other attribute of the database. Contact Kimberlite directly to learn more or to have Kimberlite prepare customized analysis for your specific requirements.

This report was prepared by Kimberlite International Oilfield Research and is intended for the exclusive use of the clients who purchase the report.

## EXECUTIVE SUMMARY

The market share report is based on expenditures among the oil and gas operators worldwide for 74 specific oilfield product and services.

The market share analysis is presented in aggregate and by the respective product categories (G&G/formation evaluation, drilling, completion, production and subsea) and individual product service lines.

The market share analysis is additionally segmented by geographic region and customer type (major oil companies, independent oil companies and national oil companies).

Aggregating all 74 of the most commonly used oilfield products and services worldwide reveals that Schlumberger commands the largest market share worldwide and regionally as evaluated below by North America land, international land and worldwide offshore.

<b>ESTIMATED MARKET SHARES (74 COMBINED PSLs)</b>				
	Worldwide	NAM Land	International Land	Offshore
Schlumberger	34%	21%	36%	36%
Halliburton	19%	15%	22%	19%
Baker Hughes	14%	12%	16%	14%
Weatherford	4%	6%	5%	3%
All Others	29%	46%	21%	28%

Evaluating market share by major product category (G&G/formation evaluation, drilling, completions, production and subsea) worldwide reveals that Schlumberger leads in overall worldwide market share for 3 of the 5 major product categories. Halliburton leads in overall worldwide market share for completion equipment and services and TechnipFMC and Oceaneering are both worldwide market share leaders for subsea life of field services.

<b>ESTIMATED MARKET SHARES BY PRODUCT/ SERVICE CATEGORY</b>					
	G&G/ Formation Evaluation	Drilling Equip & Services	Completion Equip & Services	Production Equip & Services	Subsea Life of Field Services
Schlumberger	49%	34%	19%	22%	15%
Halliburton	14%	23%	30%	12%	3%
Baker Hughes	12%	15%	19%	18%	-
Weatherford	4%	4%	5%	4%	-
All Others	21%	24%	27%	44%	72%

## Product & Service Lines Evaluated

74 product and service lines are evaluated in the report and segmented by 5 major product categories (G&G/formation evaluation, drilling, completions, production and subsea).

The product and service lines evaluated in the report are shown below and segmented by their respective product categories.

### Drilling Equipment & Services

- Mud Motors
- MWD
- Rotary Steerable Systems
- Fixed Cutter Drill Bits
- Roller Cone Drill Bits
- Oil Based Drilling Fluids
- Water Based Drilling Fluids
- Cementing Services
- Cementing Tools
- Casing & Tubular Running Services
- Liner Hangers
- Surface Wellheads
- Annular BOPs (Land and Offshore)
- Ram BOPs (Land and Offshore)
- BOP Control Systems (Land and Offshore)
- Land Top Drives
- Land Mud Pumps
- Land Drawworks
- Offshore Drilling Risers
- Offshore Drilling Manifolds

### Completion Equipment & Services

- Packers (Mechanical, Inflatable & Swellables)
- Conventional & Dissolvable Plugs
- Sliding Sleeves
- Subsurface Safety Valves
- Sand Control Screens
- Sand Control Tools
- Sand Control Pumping Services
- Permanent Downhole Monitoring
- Intelligent Completions
- Hydraulic Fracturing Services
- Frac Trees

### G&G/Formation Evaluation

- Wireline Logging
- LWD
- Mud/ Surface Logging
- Downhole Coring & Analysis
- G&G Software (Includes 8 domains)
- Proprietary Seismic Acquisition
- Multiclient Data Licensing
- Seismic Data Processing

## Production Equipment & Services

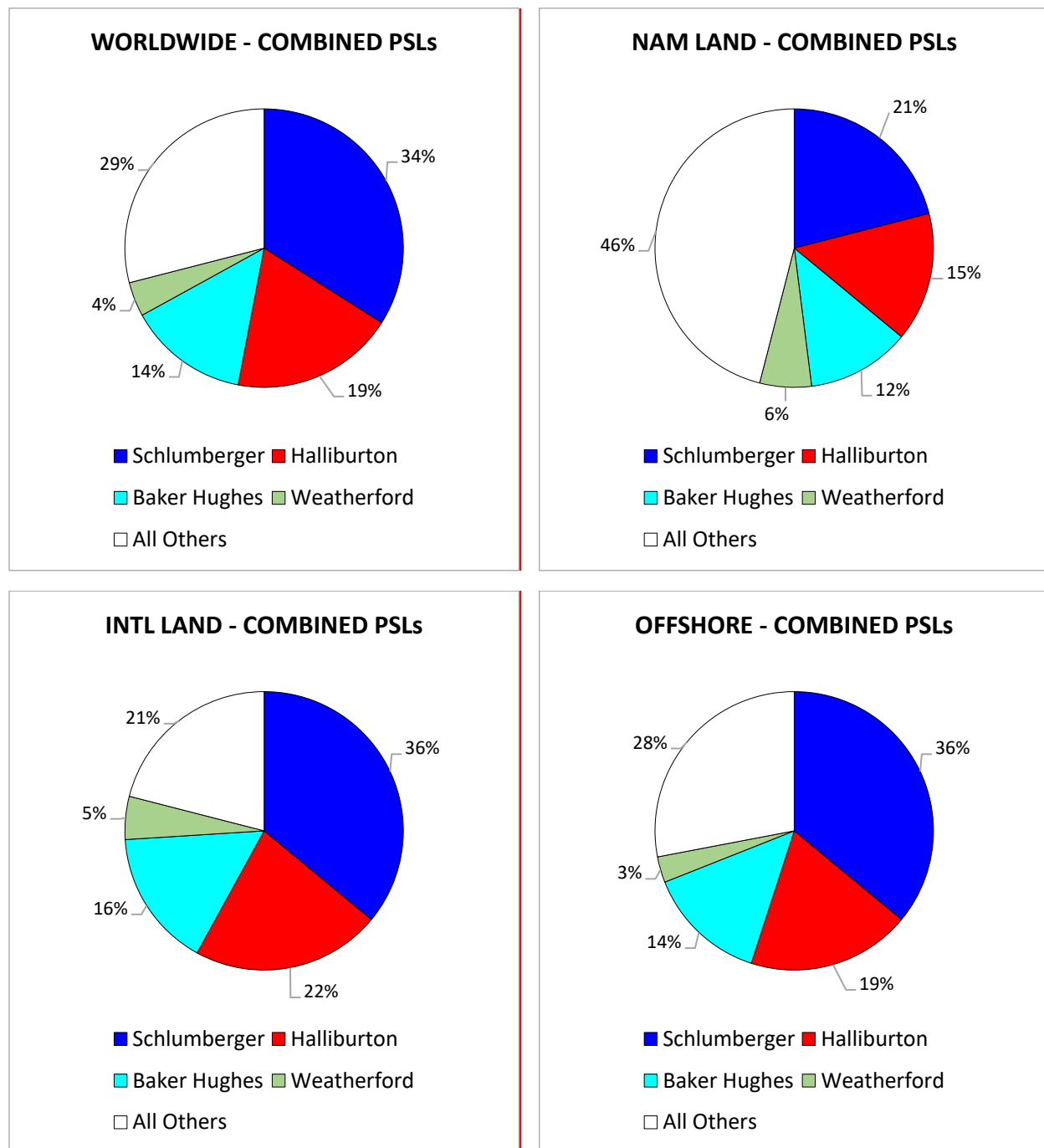
- ESP
- Rod Lift Systems
  - Surface Units
  - Sucker Rods
  - Downhole Pumps
- Gas Lift
- Plunger Lift
- Progressing Cavity Pumps
- E-Line Intervention (Conveyance & Tools)
- Coiled Tubing Intervention (Conveyance & Tools)
- Downhole Tractors
- Acid Stimulation
- Production Chemicals

## Subsea Life of Field Services

- Subsea Equipment Repair & Maintenance
- ROV Services
- IWOCS
- Subsea Test Trees
- Spanner Joint Assemblies
- Subsea Multiphase Flowmeters
- Subsea Equipment Monitoring Hardware

### Worldwide Oilfield Service Supplier Market Share Overview

Aggregating all 74 of the most commonly used oilfield products and services worldwide reveals that Schlumberger commands the largest market share worldwide and regionally as evaluated below by North America land, international land and worldwide offshore.



Evaluating market share by major product category (G&G/formation evaluation, drilling, completions, production and subsea) worldwide reveals that Schlumberger leads in overall worldwide market share for 3 of the 5 major product categories. Halliburton leads in overall worldwide market share for completion equipment.

