



A HOLISTIC MARKET ANALYSIS



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EXECUTIVE Summary

This report is a comprehensive overlook of the oil and gas sector; in this framework, it provides a thorough analysis of the industry and elaborates on the key challenges and the emerging trends that shape its landscape. In further detail, **Section 1 provides** an introduction to the industry: as such, it breaks down its key activities, identifies adjacent markets, and highlights significant industry developments. In addition, the section offers forecasts and insights regarding

the financial performance of the sector, as well as its dynamics. **Section 2 breaks down** the industry in its respective sub-segments, identifies its products and services, and maps out the international environment within which consultancies operate; it also focuses on the key trends and challenges which shape the sector and determine its future. **Section 3 deals** with the sector's finances in a more elaborate fashion: as such, it presents the industry's profit scales and

purchase levels, distinguishes among distinct business models in the field, and provides a glance at new technologies and conventional processes. **Section 4, on the other hand, concerns** the sector's surrounding environment: in this wavelength, concepts related to the industry's competitive landscape are brought into context and become the focal point of analysis. **Section 5 sheds light on** the employment patterns of the

sector. In this framework, the section brings up issues related to recruitment, retention, and turnovers, and, as such, attempts to draw a full picture of the sector's workforce and its characteristics. Finally, **the 6th section identifies** best practices, indicates optimal ways to achieve sustainable growth, and concludes with key guiding points; as such, the section provides a comprehensive action plan and a guide for future ventures.

KEY FINDINGS

1
2

OIL & GAS PRODUCTS AND SERVICES SEGMENTATION

- 54.4% Oilfield Support Services
- 19.9% Oil Drilling Services
- 16.2% Natural Gas Well Support Services
- \$36.8 billion Market Value of Top Key Player

FORECASTS

- Oil & Gas will be the 44% of world's energy supply by 2050
- Conventional Onshore Oil Production will cover the 50% of all oil production by 2050
- Unconventional Onshore Oil Production will cover the 30% of all oil production by 2050
- 1.8% annual increase in natural gas trade till 2050
- 30% decline in petrochemical production till 2050

3
4

MARKET LANDSCAPE

- The demand for oil will decrease by 4% till 2040
- The demand for gas will increase by 3% till 2040
- The demand for coal will decrease by 5% till 2040

OIL PRICE VOLATILITY

- A 0.1mb/d shortage at the non-OPEC market of oil in the first half of 2019
- A 0.1mb/d surplus at the non-OPEC market of oil in the second half of 2019
- A 0.7mb/d stock draw at the non-OPEC market of oil in the second half of 2019

5 6

OIL & GAS M&A

- A 45% decline in global M&A activity from Q4 2018 to Q1 2019
- A 31% decline in global number of deals from Q4 2018 to Q1 2019
- A 6% increase in capital raising from Q4 2018 to Q1 2019

DIGITAL TRANSFORMATION

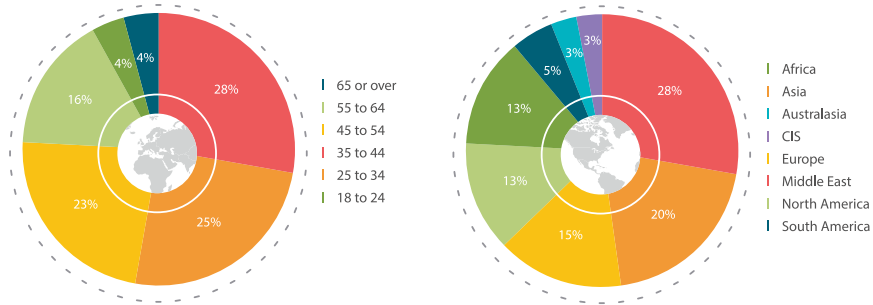
- 300,000 publications/ year
- 80,000 sensors/ oil rig
- 94% increase of production
- 2TB/ day for 1 Oil & Gas Company

Figure 1 | Global Employment Demographics in numbers. GETI (2019). The Global Energy Talent Index Report 2019 ¹

AGE

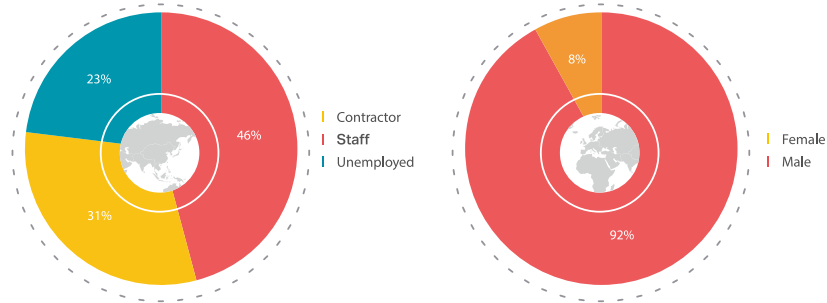
Employment

REGION



EMPLOYMENT STATUS

GENDER



¹ GETI (2019). The Global Energy Talent Index Report 2019

STRUCTURE OF THIS REPORT

This report is a comprehensive assessment of the global oil and gas market. It provides an update of previous studies that examine the oil and gas industry's impact in global economy.

The report is structured as follows:

- **Section 1: Industry Overview.** Focuses on the structure of the industry, its key activities and products as well as the financial performance and industry dynamics.
- **Section 2: Market Landscape:** Discusses the market mapping and segmentation and also the growth drivers and organic challenges of oil and gas industry.
- **Section 3: Operating Environment.** Assesses the cost structure of the market, the price volatility, the business models, as well as laws and regulations.
- **Section 4: Competitive Landscape.** Covers the globalization effect in the industry, the market share of key players; presents a key vendor analysis and M&A activities.
- **Section 5:** Emphasizes the workforce dynamics as well as the digital transformation impact.
- **Section 6:** Summarizes the whole report and suggests industry's best practices.

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