

South America AUV & ROV - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South America AUV & ROV Market is expected to register a CAGR of 5.6% during the forecast period.

COVID-19 negatively impacted the market in 2020. Presently the market has reached pre-pandemic levels.

Key Highlights

- Various factors, such as rising oil and gas production activities, growing offshore wind power industry, and increasing oil and gas decommissioning activities, are expected to drive the market during the forecast period.
- On the other hand, countries like Argentina, Chile, Colombia, and Ecuador are planning to increase their focus on climate change. These countries are expected to ban offshore exploration activities in the future, thereby restraining market growth.
- Nevertheless, the rising deepwater and ultra-deepwater discoveries are expected to open up new opportunities for the South American AUV and ROV market.
- During the forecast period, Brazil is expected to dominate the market due to the country's increasing oil and gas activities.

South America AUV & ROV Market Trends

Oil and Gas Segment to Dominate the Market

- South America is rich in oil and gas reserves. Its dependence on oil and gas is increasing as major countries in the region, such as Brazil, Colombia, Argentina, Peru, and Ecuador, rely heavily on petroleum-based products. In 2021, Brazil's oil production was

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approximately 2987 thousand barrels per day, Colombia's oil production was about 738 thousand barrels per day, and Argentina's oil production was about 627 thousand barrels per day. The oil and gas industry displays immense influence in international politics and economics.

- Oil and gas drilling rigs may operate in water depths of two miles. Many deepwater wells and pipeline systems rely on underwater vehicles to help perform installations, inspections, repairs, and maintenance.
- Also, monitoring and deployment are often challenging in adverse subsea conditions, creating operational, environmental, and technical challenges. These factors have accelerated the development of new technologies in the market studied.
- Over the past few years, Autonomous Underwater Vehicles (AUVs) and Remotely Operated Vehicles (ROV) have evolved from emerging technology with niche uses to having extensive applications in the oil and gas sector.
- Moreover, in August 2022, DOF ASA announced securing new contracts for three of its vessels in Brazil with Petrobras. These deals were worth more than USD 253 million. The contracts were awarded to DOF's Brazilian subsidiaries, Norskan Offshore Ltda. and DOF Subsea Brasil Servicos Ltda.
- Furthermore, in December 2021, Argeo, a Norwegian marine survey contractor, signed an agreement comprising AUV work for one of its customers in the Brazilian oil and gas sector. The project was scheduled to commence by the end of 2022.
- Owing to the above-stated factors, the oil and gas segment is expected to dominate the South American AUV and ROV market during the forecast period.

Brazil Expected to Dominate the Market

- Due to increasing industrialization and investments in research and development, Brazil is expected to be one of the largest markets for AUVs and ROVs during the forecast period.
- Although Brazil's natural gas production has been stagnant in recent years, the demand for natural gas is growing from numerous industries. As of 2021, natural gas production in Brazil accounted for 24.3 billion cubic meters (bcm). The growing demand is culminating in the rise in the utilization of AUVs and ROVs for detecting and mapping gas reserves across the country.
- Moreover, Petroleo Brasileiro SA plans to invest approximately USD 55 billion in Brazil from 2021 to 2025. Of this total investment, 84% is allocated to oil and gas exploration and production (E&P) and approximately 7% to refining. The remaining 9% is expected to be accounted for marketing, logistics, and others. The investment of around USD 46 billion in E&P involves approximately USD 32 billion, i.e., 70%, in pre-salt assets. This indicates that the market for AUV and ROV in Brazil's offshore oil and gas assets is expected to increase significantly during the forecast period.
- Furthermore, in September 2022, Oceaneering International Inc. announced that its subsea robotics segment was awarded a two-year service contract to support Petrobras projects off the coast of Brazil. The project's scope included providing two millennium-plus work-class ROVs, complete specialized tooling packages for each ROV, and survey equipment and personnel.
- Hence, as the points mentioned above reflect, Brazil is expected to dominate the South American AUV and ROV Market during the forecast period.

South America AUV & ROV Industry Overview

The South American AUV and ROV market is moderately fragmented in nature. Some of the key players in the market include DOF Subsea AS, Fugro NV, Subsea 7 SA, Saipem SpA, and Oceaneering International Inc.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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