

## **Oil and Gas Pipeline Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 125 pages | Mordor Intelligence

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### **Report description:**

The oil and gas pipeline market is expected to register a CAGR of more than 6.5% during the forecast period, 2022 -2027. The oil and gas market is one of the worst-hit industries during the COVID-19 pandemic. Pipeline projects witnessed delays due to imposed lockdown restrictions in major countries like the United States, India, and other countries. The decreased gas demand due to the decline in electricity consumption and travel restrictions also negatively affected gas consumption in several countries. In a bid to meet the rising oil and gas consumption, the pipeline capacities are being expanded, and new pipeline projects are being commissioned. Moreover, an increase in offshore activities, such as deepwater and ultra-deepwater production and development, is driving the oil and gas pipeline market. However, the global shift toward renewable sources for electricity generation poses a massive threat to oil and gas demand, which is likely to be a significant challenge for oil and gas pipeline installation growth in the coming years.

### **Key Highlights**

The availability of abundant natural gas reserves and the lower cost in comparison to other fossil fuel types, among others, are expected to supplement the demand for natural gas from multiple end-use sectors, including power generation. This, in turn, is expected to boost the gas pipeline market during the forecast period.

Russia and Pakistan have agreed to build a new gas-carrying pipeline worth USD 2 billion. India and Russia also signed a deal worth USD 40 billion on natural gas exports to India. Such large-scale projects are expected to drive the pipeline industry to grow more, and this is expected to present an opportunity for the market players in the near future.

Asia-Pacific is expected to witness significant growth in the pipeline market due to the increasing demand for oil and gas from the major countries in the region. China and India have been the largest consumers of oil and gas in the Asia-Pacific region, and the pipeline network is growing at a significant pace in both countries.

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## Oil & Gas Pipeline Market Trends

### The Gas Pipeline Segment to Dominate the Market

Natural gas consumption increased significantly, reaching 3,822.8 billion cubic meters (bcm) in 2020, owing to the increasing demand for natural gas in multiple industries, including power generation and transportation. This trend is expected to continue in the coming years and is likely to drive the gas pipeline infrastructure significantly.

By 2030, due to environmental benefits and the quest for energy security in regions such as the Middle East, Africa, and Asia-Pacific, the demand for natural gas is expected to witness significant growth among all fuel types.

With the exports of 197.2 billion cubic meters of gas per year in 2020, Russia continued to be the largest LNG exporter globally. The LNG trade is expected to witness a significant increase globally, resulting in increased demand for the natural gas pipeline network.

Moreover, in January 2020, the Indian government approved USD 774 million for a natural gas pipeline network in the northeast region as part of a national gas grid being built to span remote locations in the country. The 1,656 km pipeline is expected to cost up to INR 92.65 billion and is expected to be completed by 2023.

The development of new sources of natural gas, such as shale gas deposits, and the resulting price pressure are increasing the international trade of natural gas. Hence, these developments are expected to consequently result in increasing the demand for pipeline network expansion during the forecast period.

### Asia-Pacific to Dominate the Market

The energy consumption in Asia-Pacific is expected to increase by up to 48% by 2050. According to the International Energy Agency (IEA), China is expected to contribute 30% of the world's energy increase until 2025. Moreover, natural gas imports have continuously increased in China and reached 138.371 bcm in 2020, thus meeting the increasing demand.

China's state-owned firms, including CNPC and China National Offshore Oil Corporation, have plans to maximize production at local gas fields, further driving the pipeline demand in the region.

India is also modifying its gas pipeline infrastructure to meet the growing demand. In the annual budget of 2021, the Indian government announced a pipeline project for the union territory of Jammu and Kashmir. Apart from this, the nation aims to increase the natural gas share to 15% in the energy basket and expect USD 66 billion investment in building the gas infrastructure, including gas pipeline, CGD, and LNG regasification terminals.

Moreover, in December 2020, the Indian government announced a USD 60 billion investment for creating gas pipeline infrastructure, which covers the expansion of Compressed Natural Gas pipeline networks (CGD) in 232 geographical areas across the country by 2024.

Therefore, the increasing demand and new pipeline infrastructure in Asia-Pacific are significant factors driving the market growth of oil and gas.

### Oil & Gas Pipeline Market Competitor Analysis

The oil and gas pipeline market is moderately fragmented. Some major players operating in this market include Nippon Steel Corporation, Tenaris Inc., TMK Group, ChelPipe Group, and Mott Macdonald Group Ltd.

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