

Middle-East Oil and Gas Line Pipe Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Middle East oil and gas line pipe market is expected to register a CAGR of more than 4% during the forecast period, 2022 - 2027. The COVID-19 outbreak in Q1 of 2020 had delayed pipeline projects due to imposed lockdown restrictions. Also, it led to a decrease in gas demand due to the decline in electricity consumption, and travel restrictions also negatively affected oil consumption. Factors such as increasing development of gas infrastructure, growing investments, and increasing capacity of desalination plants are expected to drive the market during the forecast period. However, the high volatility of crude oil prices is expected to hinder market growth.

Key Highlights

The seamless type segment is expected to witness significant growth during the forecast period, owing to the number of advantages when compared to other types.

The rise in offshore exploration and production projects is expected to create an excellent opportunity for the market players in the years to come, as these projects are paving the way for the line pipe industry to grow more.

Saudi Arabia is expected to dominate the Middle East oil and gas line pipe market during the forecast period.

Middle-East Oil & Gas Line Pipe Market Trends

Seamless Type Segment to Witness a Significant Growth

Seamless line pipes are small parts of a long pipeline manufactured or made after heating and restructuring steel into

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round-shaped solid rods known as billets. These billets are further heated and then pierced by a bullet-shaped piercer, over which the steel gets stretched and takes the shape of a hollow pipe without having any seams on its surface.

These types of line pipes are usually suitable for high-pressure applications such as in the oil and gas midstream sector, refineries, chemical industry, etc. Moreover, the general application of such line pipes depends on their thickness. Thus, high-pressure applications are required to have higher thickness.

Several advantages of using these line pipes include their ability to improve the withstand pressure of the pipeline, uniformity of shape required to install other equipment between two-line pipes, and greater strength under load. However, despite having several advantages, these line pipes also have an equal number of disadvantages that generally occur in them during production. These disadvantages include high cost, residual stresses caused by unstable cooling creating deformation, and uneven thickness and pipe width after cooling.

Moreover, in 2020, the Middle Eastern region was the largest producer of crude oil, producing 1,297.3 metric tons, which accounted for 31.1% of the global crude oil production. The increasing demand and production of oil and gas in the region in recent years gave rise to several seamless pipeline projects. For instance, in March 2021, TMK supplied seamless steel pipes to the Sharjah National Oil Corporation (SNOC) to transport Mahani Gas production to SNOC Sajaa Gas Plant in Sharjah, UAE. The 16-inch line pipes totally weighed 5,000 tons, and they were used to construct 22 km of a pipeline to transfer corrosive natural gas from the Mahani field to gas processing plants. Such projects transporting corrosive fluids or gas in the oil and gas industry are expected to propel the market growth for seamless line pipes during the forecast period.

Therefore, based on the above-mentioned factors, seamless line pipes are expected to witness significant growth, which, in turn, increases the demand for the oil and gas line pipe market during the forecast period.

Saudi Arabia to Dominate the Market

Saudi Arabia also has the world's fifth-largest estimated shale gas reserve. Thus, it has great potential for the country to replicate North America's unconventional reserves development growth. The increasing exploitation of unconventional reserves is expected to drive the demand for line pipes in multiple gatherings and treatment stations.

By 2028, Saudi Aramco plans to produce 0.65 bcm of natural gas per day and is expected to target unconventional gas reserves in North Arabia, the South Ghawar, and the Jafurah Basin, East of Ghawar.

Saudi Aramco and Saudi Basic Industries Corp (SABIC) plan to set up a joint oil-to-chemicals project that produces chemicals and base oils directly from 20 million tons per annum of crude oil. It is expected that the facility is likely to be completed by 2028, thus, witnessing the significant application of line pipes.

With up-gradation and expansion projects in refineries like SASREF, Petro Rabigh, and Jubail and the launching of the Jizan refinery, the deployment of line pipes in Saudi Arabia is expected to increase considerably.

In December 2021, Aramco announced that it had signed a USD 15.5 billion lease and leaseback deal involving its gas pipeline network in Saudi Arabia with a consortium led by BlackRock Real Assets and Hassana Investment Company.

With increasing gas production to 119,000 million standard cubic meters in 2020, the demand for line pipes is growing considerably. Additionally, with new refining projects, Saudi Arabia is expected to dominate the oil and gas line pipe market in the Middle Eastern region.

Therefore, based on the above-mentioned factors, Saudi Arabia is expected to dominate the oil and gas line pipe market over the forecast period.

Middle-East Oil & Gas Line Pipe Market Competitor Analysis

The Middle Eastern oil and gas line pipe market is moderately fragmented. The key players in the market include Arabian Pipes Company, Rezayat Group, EEW Group, Sumitomo Corporation, and Vallourec SA.

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