

Asia-Pacific Intelligent Pigging Market - Growth, Trends, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The Asia-Pacific intelligent pigging market is expected to register a CAGR of over 6.52% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Currently, the market has reached pre-pandemic levels.

Key Highlights

Over the short term, the Asia-Pacific intelligent pigging market is expected to register significant growth due to the increasing demand for pipeline pigging services in the region and the high growth of oil and gas production.

On the other hand, intelligent pigging is not applicable to unpigged pipelines, which impedes the market growth.

Nevertheless, the growing energy consumption in the region, distinctly in developing countries, is propelled by the advancing steps of urbanization.

Due to the upcoming oil and gas pipeline projects, China is predicted to have the highest share in the market studied.

APAC Intelligent Pigging Market Trends

Ultrasonic Pigs Expected to Witness Significant Growth

An ultrasonic pig uses ultrasounds to detect the thickness changes in the pipe wall. Ultrasonic pigs are equipped with a transducer, which perpendicularly transmits signals to the pipe wall surface and receives signals from both the pipeline's internal and external surfaces. Furthermore, the echo received from the signals can be used to determine the pipeline wall's thickness. Ultrasonic pigs provide an absolute measurement of defect depth in the pipe and can measure metal losses in much thicker pipes than is possible with magnetic flux leakage technology.

Ultrasonic pigs can be used in a wide range of pipeline sizes, ranging from 4 inches up to 56 inches. The technology is generally

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used for liquid pipelines but can also be used for gas pipelines with the help of a couplant. The pipelines developed in the East-Asian region are 58,800km in length. As of 2021, the length is expected to extend even more due to the demand in upcoming projects.

For example, in 2022, the construction of the 580 kilometers pipeline in Western Australia started. The USD 460 million worth of pipelines may transport natural gas from the Perth basin to resources projects in the state's Goldfield. The Northern Goldfield Interconnect is expected to be a part of the 2,690-km gas pipeline network in Western Australia and significantly increase the volume of gas transported inland.

The ultrasonic segment is also expected to grow in the near future due to the technological developments made in the sector. As an example, in January 2022, Dacon Inspection Technologies, the Thailand-based company, made new advancements in the ultrasonic in-line inspection fleet used for pipelines, which increases the inspection data accuracy as well as the inspection of non-ferrous materials such as metals and plastics like High-Density Poly Ethylene (HDPE) pipelines.

Such developments are expected to drive the technology market in the region in a fast-paced manner.

China Expected to Dominate the Market

China is the largest crude oil and natural gas producer in the Asia-Pacific region and accounted for around 50% and 26% of the total crude oil and natural gas production in the region in 2021. In 2021, 198.98 million tons of crude oil were produced, an increase of 2.4% over the previous year, a rise of 4.0% over 2020, and an average increase of 2.0% over the two years.

The country envisaged consistent growth in the pipeline network established due to the increasing energy consumption. The total length of the operational oil pipelines in the country was recorded as 25,271.3 km as of June 2022, the highest among all the Asian countries. The network is bound to grow more due to the upcoming pipeline projects in the country.

For instance, the construction of the No.4 pipeline of China's West-to-East transmission project started in September 2022. The pipeline was designed to lift the annual carrying capacity of the system to more than 100 billion cubic meters (bcm) after linking with the completed No.3 and No.2 pipelines. The No.4 gas pipeline is expected to be 3,340km long, from Wuqi county in Northwest China's Xinjiang Uygur Autonomous Region to Zhongwei in Northwest China's Ningxia Hui Autonomous Region.

In addition, in February 2022, Russia agreed to a 30-year contract to supply gas to China via a new pipeline. It may settle the recent gas sales in Euros, bolstering an energy alliance with Beijing amid Moscow's strained ties with the West over Ukraine and other issues. Gazprom, which has a monopoly on Russian gas exports by pipeline, agreed to supply Chinese state energy major CNPC with 10 billion cubic meters of gas annually.

Such developments are expected to visibly steer the market in China more than any other country in the region.

APAC Intelligent Pigging Market Competitor Analysis

The Asia-Pacific intelligent pigging market is moderately fragmented. Some of the key players in the market (in no particular order) include Rosen Group, NDT Global Services Ltd, SGA SA, Baker Hughes Company, and Penspen Limited.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Scope of the Study

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- 1.2 Market Definition
- 1.3 Study Assumptions

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Size and Demand Forecast in USD billion, till 2027
- 4.3 Recent Trends and Developments
- 4.4 Government Policies and Regulations
- 4.5 Market Dynamics
 - 4.5.1 Drivers
 - 4.5.2 Restraints
- 4.6 Supply Chain Analysis
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Bargaining Power of Suppliers
 - 4.7.2 Bargaining Power of Consumers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitutes Products and Services
 - 4.7.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 Technology
 - 5.1.1 Magnetic Flux Leakage Pigs
 - 5.1.2 Capiller Pigs
 - 5.1.3 Ultrasonic Pigs
- 5.2 Application
 - 5.2.1 Crack & Leakage Detection
 - 5.2.2 Metal Loss/ Corrosion Detection
 - 5.2.3 Geometry Measurement & Bend Detection
- 5.3 Pipeline Fluid Type
 - 5.3.1 Oil
 - 5.3.2 Gas

6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Strategies Adopted by Leading Players
- 6.3 Company Profiles
 - 6.3.1 Rosen Group
 - 6.3.2 NDT Global Services Ltd.
 - 6.3.3 SGA SA
 - 6.3.4 Baker Hughes Company
 - 6.3.5 Penspen Limited
 - 6.3.6 Dtaic Inspection Equipment (Suzhou) Co Ltd.
 - 6.3.7 Dacon Inspection Technologies

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6.3.8 Panorama Oil & Gas Sdn Bhd

6.3.9 Romstar Sdn Bhd.

6.3.10 NDTs India (P) Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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