

Europe Intelligent Pigging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Intelligent Pigging Market is expected to register a CAGR of greater than 3% during the forecast period.

Key Highlights

- The market was negatively impacted by COVID-19 in 2020. Presently the market has now reached pre-pandemic levels. Over the short term, the Europe 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 market growth. Nevertheless, the growing energy consumption in the region, distinctly in developing countries, is propelled by the advancing steps of urbanization.
- Russia is expected to witness the fastest growth in the Europe Intelligent Pigging Market during the forecast period as it focuses on the development and construction of new pipelines.

Europe Intelligent Pigging Market Trends

Caliper Pigging as a Significant Intelligent Pigging Process

- Caliper pigging gives useful and detailed information on the pipeline, such as ovalities, dents, valve locations, and girth welds and t pieces. Aside from that, caliper-pigging equipment can be employed in liquid and gas pipelines, high-angle 1.5D bends, and long-distance pipelines.
- In addition, the new pipelines, particularly gas pipelines, are equipped with sophisticated equipment, such as an advanced and

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large number of valves and fluid flow and pressure sensors. The equipment is intended to attain better control over production. But with a complicated pipeline structure, it is important to acquire detailed data. Caliper pigging is the most suitable type of pigging for these kinds of operations. Hence, they are preferred by gas pipeline operators.

- Furthermore, the caliper pigs could identify minute changes in pipelines by using the independently suspended spring-loaded measuring arms to determine the internal cross-section of the pipeline. These arms are in continuous contact with the inner surface of the pipeline. Thus, it could identify the slight change in pipe diameter. Due to these advantages, the oil and gas pipeline companies have a high demand for caliper pigs.
- Due to the market's supply, production, and demand for oil and gas, the expansion of new oil and gas pipeline projects in the region's key countries was necessary for the pipeline-pigging industry to grow in Europe.
- Europe is among one of the biggest importers of natural gas in the world, leading to significant demand for pipeline infrastructure in the region for the efficient transport of natural gas across the region. In the last decade, the demand for energy has grown significantly in the region due to the growing demand for primary energy in the region. In 2021, Europe's natural gas consumption was 571.1 billion cubic meters, contributing 14.1 % of total world consumption.
- In August 2022, two energy firms, namely Equinor and Wintershall Dea, partnered to build a 900 km (560 miles) pipeline connecting a CO₂ collection facility in Northern Germany with storage sites in Norway by 2032. The pipeline is likely to have a capacity of 20 million to 40 million tonnes of CO₂ per year, equivalent to around 20% of all annual German industrial emissions. Such partnerships/collaborations are likely to create positive demand for the intelligent pigging market during the forecast period.
- Therefore, due to technological advancements, the demand for caliper pigging is expected to witness significant growth, which, in turn, drives the demand for the intelligent pigging market.

Russia to dominate the market

- As of January 2022, Russia ranked sixth in terms of proven oil reserves, but it was still the third-largest producer of oil across the globe with a production volume of 11.3 million barrels per day (mb/d), only behind the United States and Saudi Arabia with a production of 17.6 mb/d and 12 mb/d, in January 2022. Despite Russia's proven reserves being almost 70% less than Saudi Arabia's, it is almost at par when it comes to production as of 2021.
- However, most of the country's oil is being produced from brownfields in Western Siberia that have been in operation for decades. This is primarily due to the development of new technologies to increase production rates. The increase in the production of oil & gas in the country has led to significant demand for midstream infrastructure in the country.
- Russia has a huge network of pipelines for exporting oil and gas to Europe and other foreign countries, including China. As of 2021, Gazprom holds control of most of the pipelines and has about 176,800 kilometers of pipeline, including domestic and international. In 2021, Russia's natural gas consumption was 474.6 billion cubic meters.
- According to the Global Energy Monitor Statistics, as of June 2022, Russia had an oil pipeline length of around 2,051.2 km (proposed + construction) and 40,091.9 km (operational). The country is actively developing new pipelines to support its existing infrastructure and further develop its gas exporting capacity and capability. For instance, the Nord Stream 2 gas pipeline, with a length of 1,230 km from Russia to Germany running through the Baltic Sea, was completed in September 2021 (but has not yet entered service due to the pending certification by Germany and the European Union). Planning and construction of the pipeline were mired in political controversy over fears that Russia would use it for geopolitical advantage with Europe and Ukraine.
- TurkStream, another pipeline project that directly connects the largest gas reserves in Russia to the Turkish gas transportation network, providing reliable energy to Turkey, South and Southeast Europe. This pipeline starts on the Russian coast, runs over 930 km through the Black Sea, and comes ashore in the Thrace region of Turkey. The offshore component of the system consists of two parallel lines running through the Black Sea. The pipelines enter the water on the Russian coast and come ashore on the Turkish coast in the Thrace region. Additionally, this project helps ensure the reliability of energy supplies to Turkey and Europe and contributes to Turkey's economic development through the resources it has allocated for the construction and operation of the pipeline.

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- Such benefits are likely to create positive demand for the intelligent pigging market during the forecast period.

Europe Intelligent Pigging Industry Overview

The Europe intelligent pigging market is fragmented. The key players include (not in particular order) Rosen Group, PipeSurvey International, SGS SA, NDT Global Services Ltd, and Pigtek Ltd., among others.

Additional Benefits:

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

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