

Middle-East and Africa Pigging Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Middle-East and Africa Pigging Services Market is expected to register a CAGR of greater than 5% during the forecast period.

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

Key Highlights

- Although the oil and gas sector has made considerable strides, the aging pipeline systems continue to be a major source of worry and necessitate ongoing maintenance actions to preserve pipeline efficiency. This is likely to drive the market studied.
- On the other hand, the uncertainty brought about by the process of interpreting data for pipeline inspections and, in some situations, the additional expense associated with running the second pig is expected to hinder the market growth during the forecast period.
- Nevertheless, the upcoming pipeline projects under construction globally are expected to create tremendous market opportunities in years to come.

MEA Pigging Services Market Trends

Intelligent Pigging Segment to Dominate the Market

- The pipelines are inspected using intelligent pigging. This is frequently employed to capture crucial information, including the existence and location of corrosion or other anomalies on the pipe's inner walls.

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- There are mainly two types of intelligent pigging operations, magnetic flux leakage (MFL) pigging and ultrasonic pigging. Magnetic flux leakage pigs can be used on both liquid and gas pipelines and do not require any liquid coolant as in ultrasonic pigging. Magnetic flux leakage pigs can detect and measure metal loss or corrosion and cracks and weld defects even in thin-walled pipelines, while ultrasonic pigs fail to identify and measure thin-walled pipelines accurately.
- Intelligent pigging can carry out many measurements, including geometry measurement, metal-loss detection, leak detection, pipeline profiling and mapping, temperature and pressure recording, bend measurement and curvature monitoring, product sampling, photographic inspection, wax deposit measurement, and crack detection.
- In 2022, the estimated capital expenditures for in-development pipelines (Proposed, Construction) is 101.2 billion USD in the Middle East and African region. This creates demand for pipeline pigging and is expected to drive the pigging services market during the forecast period.
- Moreover, the Pipeline Research Consortium International (PRCI) funds over USD 20 million of research and development into pipeline knowledge and technologies. Pipeline inspection technology research, either throughILI smart pigs or hand-held diagnostic tools used for further testing of pipe, is a prime focus of the research.
- Therefore, due to the technological advancements, the demand for intelligent pigging is expected to witness significant growth, driving the demand in the pigging services market.

Saudi Arabia to Dominate the Market

- Saudi Arabia is likely to be a major market for pigging services during the forecast period. After COVID-19, crude oil consumption is expected to return to its pre-pandemic level and is expected to rise during the forecast period.
- Crude oil production is expected to increase to maintain the rising demand for oil supply. In 2021, Saudi Arabia's production of oil accounted for 12.2% of the total production in the Middle East.
- Moreover, 90 crude oil and petroleum product pipelines totaling 12,000 miles (19,000 km), owned and operated by Saudi Aramco, connect producing areas to processing facilities, export terminals, and consumption centers. The Petrolina or East-West crude and the Abqaiq-Yanbu carrying natural gas liquids (NGL) products are the two main operational pipelines.
- In December 2021, Aramco announced a landmark gas pipeline transaction worth USD 15.5 billion with an international group led by BlackRock Real Assets and Hassana Investment Company, creating demand for the pigging services market during the forecast period.
- Therefore, with an increasing pipeline network and oil and gas production, the demand for the pigging services market in the country is expected to grow substantially during the forecast period.

MEA Pigging Services Industry Overview

The Middle East and African pigging services market is fragmented. The key players are Rosen Group, T.D. Williamson Inc., Baker Hughes Company, NDT Global Services Ltd, and SGS SA.

Additional Benefits:

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

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