

Oil and Gas Pipeline - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Oil and Gas Pipeline Market is expected to register a CAGR of greater than 6.5% during the forecast period.

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

Key Highlights

- 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. Also, 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.
- 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.
- 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.

Oil and Gas Pipeline Market Trends

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The Gas Pipeline Segment to Dominate the Market

- Natural gas consumption increased significantly, reaching 4037.5 billion cubic meters (bcm) in 2021, 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 exports of 201.7 billion cubic meters of gas annually in 2021, 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.
- As of 2021, Globally, 408 new gas pipelines are under construction or in pre-construction, totaling 193,400 km, while 510 capacity expansions and upgrades to existing infrastructure are in progress.
- According to the Global energy monitor, Europe has a total of 16 gas pipelines under construction, totaling 3,200 kilometers (km) and costing EUR 6.5 billion. Of this, EUR 2.1 billion is earmarked for the Baltic Pipe Project, which is expected to increase EU gas import capacity by 10 billion cubic meters annually.
- 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

- 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 162.7 bcm in 2021, 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.
- Moreover, In January 2022, ONGC awarded L&T Hydrocarbon Engineering Limited a contract for the seventh development phase of their Pipeline Replacement Projects. EPCIC's contract involves the engineering, procurement, construction, installation, and commissioning of around 350 km of subsea pipelines and offshore work spread across ONGC's west coast offshore fields.
- Moreover, In February 2022, A final investment decision was signed by China National Offshore Oil Company and TotalEnergies with Uganda and Tanzania to begin more than USD 10 billion in investments to produce and export crude oil from Uganda. The venture entails a USD 5 billion oil pipeline that aids in transporting crude from landlocked Uganda to global markets via a port on Tanzania's coast of the Indian Ocean.
- Therefore, the increasing demand and new pipeline infrastructure in Asia-Pacific are significant factors driving the market growth of oil and gas.

Oil and Gas Pipeline Industry Overview

The oil and gas pipeline market is moderately fragmented. Some major players operating in this market (in no particular order) include Nippon Steel Corporation, Tenaris Inc., TMK Group, ChelPipe Group, and Mott Macdonald Group Ltd.

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

Table of Contents:

1 INTRODUCTION

- 1.1 Scope of the Study
- 1.2 Market Definition
- 1.3 Study Assumptions

2 EXECUTIVE SUMMARY

3 RESEARCH METHODOLOGY

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Size and Demand Forecast in USD billion, till 2028
- 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 Location of Deployment
 - 5.1.1 Onshore
 - 5.1.2 Offshore
- 5.2 Type
 - 5.2.1 Crude Oil Pipeline
 - 5.2.2 Gas Pipeline
- 5.3 Geography
 - 5.3.1 North America
 - 5.3.2 Europe
 - 5.3.3 Asia-Pacific
 - 5.3.4 South America
 - 5.3.5 Middle-East and Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Strategies Adopted by Leading Players

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6.3 Company Profiles

6.3.1 Nippon Steel Corporation

6.3.2 Tenaris Inc.

6.3.3 TMK Group

6.3.4 Mott Macdonald Group Ltd

6.3.5 Shengli Oil & Gas Pipe Holdings Limited

6.3.6 United States Steel Corporation

6.3.7 OMK Steel Ltd

6.3.8 ChelPipe Group

6.3.9 TechnipFMC PLC

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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