

# Oil and Gas Processing Seals Market - Global Outlook and Forecast 2020-2025

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## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Oil and Gas Processing Seals Market Report

The oil and gas processing seals market by revenue is expected to grow at a CAGR of over 2% during the period 2020–2025.

Several seal manufacturers are significantly focusing on innovations in terms of design and efficiency. Increasing investments and the recent discovery of oil fields in emerging countries such as India, Australia, and Brazil are expected to increase sealing solutions during the forecast period. With the increasing awareness of sustainability across the globe, oil and gas seal manufacturing companies adopt innovative manufacturing practices and technologies. The adoption of smart precision manufacturing and the availability of raw materials for seal manufacturing is expected to propel the production. The COVID-19 outbreak has hit several industries; however, the oil and gas industry has been the worst affected. The spread of the coronavirus has compelled several companies to slow down their production, and, in many cases, production sites have been closed. Hence, the demand for oil and gas processing sealing solutions has proportionally declined due to production slowdown. The global oil and gas processing seals industry focuses on improving efficiency and productivity, especially in the Middle East and Africa, and North America.

The following factors are likely to contribute to the growth of the oil and gas processing seals market during the forecast period:

Development of Smart Oilfields

## Adoption of Enhanced Oil Recovery (EOR) Technique

### Increased Upstream Production Activities

The study considers the present scenario of the oil and gas processing seals market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

### Global Oil and Gas Processing Seals Market Segmentation

In terms of material type, elastomer seals hold the largest share in the global oil and gas processing seals market and are expected to continue their growth. In terms of geography, APAC holds the highest share in the elastomeric market due to the growing demand from oil and gas and other related industries. Owing to the cost-effective nature of the material, high elasticity, and high resistance to chemicals, elastomeric demand is expected to increase during the forecast period, albeit moderately. However, low tolerance to high pressure and temperature than thermoplastics is likely to hinder the elastomeric segment's growth opportunity.

O-ring seals have the most application in the oil and gas industry, and they dominate the market. It is expected that these types will continue to dominate the market. Backup rings, S-seals, and T-seals are other types of seals applied in the industry. O-ring accounted for the largest share in the global industry, followed by u-cup and back-up ring seals. The Middle East and Africa region generated the highest demand for O-ring due to a well-established oil and gas industry. However, APAC is expected to witness the highest growth among all other regions, growing at a promising CAGR for O-rings, u-cup, and back-up rings. In APAC, China and India are expected to witness the highest growth in demand and revenue. This is mainly attributed to increasing investments in the industry and recent discoveries of several oil and gas fields. It is expected that the demand for back-up rings will gain momentum during the forecast period. The major reason for the growth can be attributed to the high demand for O-ring seals. It has been estimated that revenue generated from back-up rings will further increase during the forecast period. Therefore, increasing the industry's investments leads to high demand for oil and gas processing seals to prevent leakage and natural hazards, thereby boosting the demand globally.

The downstream industry accounts for the highest share of the global oil and gas industry. In terms of geography, the Middle East and Africa region accounted for the largest share in the global oil and gas processing seals market in 2019. However, North America and APAC are expected to grow steadily during the forecast period. The demand for diesel in India is expected to double by 2030 nearly. Moreover, favorable government regulations, such as 100% FDI in India's private refinery projects sector, are a major factor driving the growth of the APAC downstream industry.

#### Material Type

Elastomers

Thermoplastics

Others

#### Product Type

O-rings

U-cup seals

Back-up ring

Spring energized seals

Others

#### Application

Downstream

Midstream

Upstream

## Insights by Geography

The Middle East and Africa region hold the highest revenue share in the global oil and gas processing seals market. The region has several highest oil and natural gas producing countries in the world. Saudi Arabia, Iran, Iraq, the UAE, and Nigeria are the major countries contributing to the high share of the region's market. The industry in the Middle East and Africa has been severely affected due to the eruption of the COVID-19 pandemic. High disruptions in the supply chain in the Middle East and Africa and a sharp decline in oil and gas consumption have adversely affected the market. Moreover, the production is expected to decrease in the region as several countries focus on domestic production, which, in turn, results in a decrease in the demand for oil and gas processing seals. Also, several renewable energy sources are challenging the traditional oil and gas production in the region. It is expected that the non-fossil fuels energy demand in the Middle East and Africa will increase from 1% in 2017 to over 13% by 2040. Several factors, such as the availability of high-volume proven reserves, well-established infrastructure, and the shift toward renewable sources of energy, are expected to hinder the growth of the oil and gas industry in the Middle East and Africa. Hence the growth is likely to be moderate.

## By Geography

North America

US

Canada

Europe

UK

Norway

Russia

Denmark

Italy

## APAC

China

Indonesia

Australia

India

## Latin America

Brazil

Mexico

Others

## Middle East and Africa

Saudi Arabia

Iran

Iraq

UAE

Others

## Insights by Vendors

The global oil and gas processing seals market is moderately fragmented due to several highly established vendors across regions. Vendors in the market adopt several strategies to tackle intense competition among players offering their products with high efficiency across all downstream, upstream, and midstream oil and gas application industries. Mergers and acquisitions in the market are observed at frequent intervals to gain scale and scope opportunities. Many companies are also focused on launching

innovative products to strengthen their market position that significantly induces the competitive landscape.

#### Prominent Vendors

EnPro Industries

Flowserve Corporation

John Crane

Parker-Hannifin Corporation

Ilex Corporation

Trelleborg

#### Other Prominent Vendors

Freudenberg Oil and Gas Technologies

M. Barnwell Services

Green Tweed

CDI Energy Products

Aesseal

Saint-Gobain

Techno AD

#### Key Questions Answered:

1. What is the oil & gas processing seals market size and growth rate during the forecast period?

2. Which industry will witness high demand for the oil and gas seals market?
3. Which segments are covered in this research report?
4. Which region will lead the demand for seals and gaskets market?

## Contents

### **1 RESEARCH METHODOLOGY**

### **2 RESEARCH OBJECTIVES**

### **3 RESEARCH PROCESS**

### **4 SCOPE & COVERAGE**

#### 4.1 Market Definition

##### 4.1.1 Inclusions

##### 4.1.2 Exclusions

#### 4.2 Base Year

#### 4.3 Scope of The Study

##### 4.3.1 Market Segmentation by Material Type

##### 4.3.2 Market Segmentation by Product Type

##### 4.3.3 Market Segmentation by Application

##### 4.3.4 Market Segmentation by Geography

### **5 REPORT ASSUMPTIONS & CAVEATS**

#### 5.1 Key Caveats

#### 5.2 Currency Conversion

#### 5.3 Market Derivation

### **6 MARKET AT A GLANCE**

### **7 INTRODUCTION**

#### 7.1 Overview

##### 7.1.1 Static & Dynamic Seals

##### 7.1.2 Oil and gas Seals Market Comparison 2019 & 2025

#### 7.2 Impact Of COVID-19

##### 7.2.1 Production & Consumption Insights

#### 7.3 Global Economy: 2019

#### 7.4 Global Oil and Gas Industry Outlook

##### 7.4.1 Overview

##### 7.4.2 Midterm Outlook Up To 2022



7.4.3 Long-term Outlook Upto 2025 and beyond

7.4.4 Factors Impacting Demand

## **8 MARKET OPPORTUNITIES & TRENDS**

8.1 Smart Oil Filed Innovation

8.2 Developments In Sealing Products In Adherence To Challenging Environment

8.3 Adoption Of Enhanced Oil Recovery (EOR) Technique

## **9 MARKET GROWTH ENABLERS**

9.1 Increasing Upstream Production Activities

9.2 Huge Consumption of Oil And Gas Globally

9.3 Unconventional Oil Production in US & Beyond

## **10 MARKET RESTRAINTS**

10.1 Shift to Renewable & Alternative Energy Sources

10.2 Adverse Impact Of COVID-19

## **11 MARKET LANDSCAPE**

11.1 Market Overview

11.1.1 Key Insights

11.2 Market Size & Forecast

11.3 Five Forces Analysis

11.3.1 Threat of New Entrants

11.3.2 Bargaining Power of Suppliers

11.3.3 Bargaining Power of Buyers

11.3.4 Threat of Substitutes

11.3.5 Competitive Rivalry

## **12 MATERIAL**

12.1 Market Snapshot & Growth Engine

12.2 Market Overview

12.2.1 Competitive Market

12.3 Elastomers

12.3.1 Market Overview

- 12.3.2 Market Size & Forecast
- 12.3.3 Market by Geography
- 12.4 Thermoplastics
  - 12.4.1 Market Overview
  - 12.4.2 Market Size & Forecast
  - 12.4.3 Market by Geography
- 12.5 Others
  - 12.5.1 Market Overview
  - 12.5.2 Market Size & Forecast
  - 12.5.3 Market by Geography

## **13 PRODUCT**

- 13.1 Market Snapshot & Growth Engine
- 13.2 Market Overview
- 13.3 O-Rings
  - 13.3.1 Market Overview
  - 13.3.2 Market Size & Forecast
  - 13.3.3 Market by Geography
- 13.4 U-Cup Seals
  - 13.4.1 Market Overview
  - 13.4.2 Market Size & Forecast
  - 13.4.3 Market by Geography
- 13.5 Back-Up Rings
  - 13.5.1 Market Overview
  - 13.5.2 Market Size & Forecast
  - 13.5.3 Market by Geography
- 13.6 Spring Energized Seals
  - 13.6.1 Market Overview
  - 13.6.2 Market Size & Forecast
  - 13.6.3 Market by Geography
- 13.7 Others
  - 13.7.1 Market Overview
  - 13.7.2 Market Size & Forecast
  - 13.7.3 Market by Geography

## **14 APPLICATION**

- 14.1 Market Snapshot & Growth Engine

## 14.2 Market Overview

### 14.2.1 Upstream

### 14.2.2 Downstream

### 14.2.3 Midstream

## 14.3 Downstream Oil and Gas Industry

### 14.3.1 Market Overview

### 14.3.2 Oil and Gas Refinery Insights

### 14.3.3 Market Size & Forecast

### 14.3.4 Market by Geography

## 14.4 Upstream Oil and Gas Industry

### 14.4.1 Market Overview

### 14.4.2 Oil and Gas Production Insights

### 14.4.3 Key Restraints

### 14.4.4 Market Size & Forecast

### 14.4.5 Market by Geography

## 14.5 Midstream Oil and Gas Industry

### 14.5.1 Market Overview

### 14.5.2 Market Size & Forecast

### 14.5.3 Market by Geography

## 15 GEOGRAPHY

### 15.1 Market Snapshot & Growth Engine

### 15.2 Geographic Overview

#### 15.2.1 Middle East & Africa

#### 15.2.2 North America

#### 15.2.3 Europe

#### 15.2.4 APAC

#### 15.2.5 Latin America

## 16 MIDDLE EAST & AFRICA

### 16.1 Market Overview

### 16.2 Market Size & Forecast

### 16.3 Material Type

#### 16.3.1 Market Snapshot & Growth Engine

#### 16.3.2 Elastomers: Market Size & Forecast

#### 16.3.3 Thermoplastics: Market Size & Forecast

#### 16.3.4 Others: Market Size & Forecast

## 16.4 Product Type

- 16.4.1 Market Snapshot & Growth Engine
- 16.4.2 O-rings: Market Size & Forecast
- 16.4.3 U-cup Seals: Market Size & Forecast
- 16.4.4 Back-up Rings: Market Size & Forecast
- 16.4.5 Spring Energized Seals: Market Size & Forecast
- 16.4.6 Others: Market Size & Forecast

## 16.5 Application

- 16.5.1 Market Snapshot & Growth Engine
- 16.5.2 Downstream Oil and gas Industry: Market Size & Forecast
- 16.5.3 Upstream Oil and gas Industry: Market Size & Forecast
- 16.5.4 Midstream Oil and gas Industry: Market Size & Forecast

## 16.6 Key Countries

- 16.6.1 Saudi Arabia: Market Size & Forecast
- 16.6.2 Iran: Market Size & Forecast
- 16.6.3 Iraq: Market Size & Forecast
- 16.6.4 UAE: Market Size & Forecast
- 16.6.5 Rest of Middle East & Africa: Market Size & Forecast

# 17 NORTH AMERICA

## 17.1 Market Overview

## 17.2 Market Size & Forecast

## 17.3 Material Type

- 17.3.1 Market Snapshot & Growth Engine
- 17.3.2 Elastomers: Market Size & Forecast
- 17.3.3 Thermoplastics: Market Size & Forecast
- 17.3.4 Others: Market Size & Forecast

## 17.4 Product Type

- 17.4.1 Market Snapshot & Growth Engine
- 17.4.2 O-rings: Market Size & Forecast
- 17.4.3 U-cup Seals: Market Size & Forecast
- 17.4.4 Back-up Rings: Market Size & Forecast
- 17.4.5 Spring Energized Seals: Market Size & Forecast
- 17.4.6 Others: Market Size & Forecast

## 17.5 Application

- 17.5.1 Market Snapshot & Growth Engine
- 17.5.2 Downstream Oil and gas Industry: Market Size & Forecast
- 17.5.3 Upstream Oil and gas Industry: Market Size & Forecast

- 17.5.4 Midstream Oil and gas Industry: Market Size & Forecast
- 17.6 Key Countries
  - 17.6.1 US: Market Size & Forecast
  - 17.6.2 Canada: Market Size & Forecast

## **18 EUROPE**

- 18.1 Market Overview
- 18.2 Market Size & Forecast
- 18.3 Material Type
  - 18.3.1 Market Snapshot & Growth Engine
  - 18.3.2 Elastomers: Market Size & Forecast
  - 18.3.3 Thermoplastics: Market Size & Forecast
  - 18.3.4 Others: Market Size & Forecast
- 18.4 Product Type
  - 18.4.1 Market Snapshot & Growth Engine
  - 18.4.2 O-rings: Market Size & Forecast
  - 18.4.3 U-cup Seals: Market Size & Forecast
  - 18.4.4 Back-up Rings: Market Size & Forecast
  - 18.4.5 Spring Energized Seals: Market Size & Forecast
  - 18.4.6 Others: Market Size & Forecast
- 18.5 Application
  - 18.5.1 Market Snapshot & Growth Engine
  - 18.5.2 Downstream Oil and Gas Industry: Market Size & Forecast
  - 18.5.3 Upstream Oil and gas Industry: Market Size & Forecast
  - 18.5.4 Midstream Oil and gas Industry: Market Size & Forecast
- 18.6 Key Countries
  - 18.6.1 Russia: Market Size & Forecast
  - 18.6.2 Norway: Market Size & Forecast
  - 18.6.3 Italy: Market Size & Forecast
  - 18.6.4 UK: Market Size & Forecast
  - 18.6.5 Denmark: Market Size & Forecast

## **19 APAC**

- 19.1 Market Overview
  - 19.1.1 Market Size & Forecast
- 19.2 Material Type
  - 19.2.1 Market Snapshot & Growth Engine

- 19.2.2 Elastomers: Market Size & Forecast
- 19.2.3 Thermoplastics: Market Size & Forecast
- 19.2.4 Others: Market Size & Forecast
- 19.3 Product Type
  - 19.3.1 Market Snapshot & Growth Engine
  - 19.3.2 O-rings: Market Size & Forecast
  - 19.3.3 U-cup Seals: Market Size & Forecast
  - 19.3.4 Back-up Rings: Market Size & Forecast
  - 19.3.5 Spring Energized Seals: Market Size & Forecast
  - 19.3.6 Others: Market Size & Forecast
- 19.4 Application
  - 19.4.1 Market Snapshot & Growth Engine
  - 19.4.2 Downstream Oil and gas Industry: Market Size & Forecast
  - 19.4.3 Upstream Oil and gas Industry: Market Size & Forecast
  - 19.4.4 Midstream Oil and gas Industry: Market Size & Forecast
- 19.5 Key Countries
  - 19.5.1 China: Market Size & Forecast
  - 19.5.2 India: Market Size & Forecast
  - 19.5.3 Indonesia & Malaysia: Market Size & Forecast
  - 19.5.4 Australia: Market Size & Forecast
  - 19.5.5 Rest Of APAC: Market Size & Forecast

## **20 LATIN AMERICA**

- 20.1 Market Overview
- 20.2 Market Size & Forecast
- 20.3 Material Type
  - 20.3.1 Market Snapshot & Growth Engine
  - 20.3.2 Elastomers: Market Size & Forecast
  - 20.3.3 Thermoplastics: Market Size & Forecast
  - 20.3.4 Others: Market Size & Forecast
- 20.4 Product Type
  - 20.4.1 Market Snapshot & Growth Engine
  - 20.4.2 O-rings: Market Size & Forecast
  - 20.4.3 U-cup Seals: Market Size & Forecast
  - 20.4.4 Back-up Rings: Market Size & Forecast
  - 20.4.5 Spring Energized Seals: Market Size & Forecast
  - 20.4.6 Others: Market Size & Forecast
- 20.5 Application

- 20.5.1 Market Snapshot & Growth Engine
- 20.5.2 Downstream Oil and gas Industry: Market Size & Forecast
- 20.5.3 Upstream Oil and gas Industry: Market Size & Forecast
- 20.5.4 Midstream Oil and gas Industry: Market Size & Forecast
- 20.6 Key Countries
  - 20.6.1 Mexico: Market Size & Forecast
  - 20.6.2 Brazil: Market Size & Forecast
  - 20.6.3 Rest of Latin America: Market Size & Forecast

## **21 COMPETITIVE LANDSCAPE**

- 21.1 Competition Overview

## **22 KEY COMPANY PROFILES**

- 22.1 Enpro Industries
  - 22.1.1 Business Overview
  - 22.1.2 Product Offerings
  - 22.1.3 Key Strategies
  - 22.1.4 Key Strengths
  - 22.1.5 Key Opportunities
- 22.2 Flowserve Corporation
  - 22.2.1 Business Overview
  - 22.2.2 Product Offerings
  - 22.2.3 Key Strategies
  - 22.2.4 Key Strengths
  - 22.2.5 Key Opportunities
- 22.3 John Crane
  - 22.3.1 Business Overview
  - 22.3.2 Product Offerings
  - 22.3.3 Key Strategies
  - 22.3.4 Key Strengths
  - 22.3.5 Key Opportunities
- 22.4 Parker-Hannifin Corporation
  - 22.4.1 Business Overview
  - 22.4.2 Product Offerings
  - 22.4.3 Key Strategies
  - 22.4.4 Key Strengths
  - 22.4.5 Key Opportunities

## 22.5 IDEX Corporation

### 22.5.1 Business Overview

### 22.5.2 Product Offerings

### 22.5.3 Key Strategies

### 22.5.4 Key Strengths

### 22.5.5 Key Opportunities

## 22.6 Trelleborg

### 22.6.1 Business Overview

### 22.6.2 Product Offerings

### 22.6.3 Key Strategies

### 22.6.4 Key Strengths

### 22.6.5 Key Opportunities

## 23 OTHER PROMINENT VENDORS

## 23.1 Freudenberg Oil and Gas Technologies

### 23.1.1 Business Overview

### 23.1.2 Product Offerings

## 23.2 M.Barnwell Services

### 23.2.1 Business Overview

### 23.2.2 Product Offerings

## 23.3 Green Tweed

### 23.3.1 Business Overview

### 23.3.2 Product Offerings

## 23.4 CDI Energy Products

### 23.4.1 Business Overview

### 23.4.2 Product Offerings

## 23.5 Aesseal

### 23.5.1 Business Overview

### 23.5.2 Product Offerings

## 23.6 Saint-Gobain

### 23.6.1 Business Overview

### 23.6.2 Product Offerings

## 23.7 Techno AD

### 23.7.1 Business Overview

### 23.7.2 Product Offerings

## 24 REPORT SUMMARY



24.1 Key Takeaways

24.2 Strategic Recommendations

## **25 QUANTITATIVE SUMMARY**

25.1 Market by Material Type

25.1.1 Market Size & Forecast

25.2 Market by Product Type

25.2.1 Market Size & Forecast

25.3 Market by Application

25.3.1 Market Size & Forecast

25.4 Market by Geography

25.4.1 Market Size & Forecast

25.5 Middle East & Africa

25.5.1 Material Type: Market Size & Forecast

25.5.2 Product Type: Market Size & Forecast

25.5.3 Application: Market Size & Forecast

25.6 North America

25.6.1 Material Type: Market Size & Forecast

25.6.2 Product Type: Market Size & Forecast

25.6.3 Application: Market Size & Forecast

25.7 Europe

25.7.1 Material Type: Market Size & Forecast

25.7.2 Product Type: Market Size & Forecast

25.7.3 Application: Market Size & Forecast

25.8 APAC

25.8.1 Material Type: Market Size & Forecast

25.8.2 Product Type: Market Size & Forecast

25.8.3 Application: Market Size & Forecast

25.9 Latin America

25.9.1 Material Type: Market Size & Forecast

25.9.2 Product Type: Market Size & Forecast

25.9.3 Application: Market Size & Forecast

## **26 APPENDIX**

26.1 Abbreviations

## List Of Exhibits

### LIST OF EXHIBITS

- Exhibit 1 Segmentation of Global Oil and gas Seals Market
- Exhibit 2 Market Size Calculation Approach 2019
- Exhibit 3 Supply Side Insights
- Exhibit 4 Supply Side Insights
- Exhibit 5 Market Share of Geographies in Oil and gas Seals Market 2019 & 2025
- Exhibit 6 Revenue Comparison by Product in Global Oil and gas Seals Market 2019 & 2025 (\$ billion)
- Exhibit 7 Revenue Comparison by Material in Global Oil and gas Seals Market 2019 & 2025 (\$ billion)
- Exhibit 8 Revenue Comparison by Application in Global Oil and gas Seals Market 2019 & 2025 (\$ billion)
- Exhibit 9 COVID-19 Impact
- Exhibit 10 Global Crude Oil Production 2015-2019 (thousand barrels/day)
- Exhibit 11 Global Natural Gas Production 2015-2019 (thousand barrels/day)
- Exhibit 12 Top Oil Producing Countries with Proved Reserves 2019 (thousand million barrels)
- Exhibit 13 Impact of Smart Oil Field Innovation
- Exhibit 14 Impact of Developments in Sealing Products in Adherence to Challenging Environment
- Exhibit 15 Impact of Adoption of Enhanced Oil Recovery (EOR) Technique
- Exhibit 16 Impact of Increasing Upstream Production Activities
- Exhibit 17 Global Proved Reserves 2019 (billion barrels)
- Exhibit 18 Impact of Huge Consumption of Oil and Gas Globally
- Exhibit 19 Impact of Unconventional Oil Production in US & Beyond
- Exhibit 20 Impact of Shift to Renewable & Alternative Energy Sources
- Exhibit 21 Impact of Adverse Impact of COVID-19
- Exhibit 22 Geographic Growth Momentum & Market Share
- Exhibit 23 Global Oil and gas Seals Market 2019–2025 (\$ billion)
- Exhibit 24 Five Forces Analysis 2019
- Exhibit 25 Incremental Growth by Segment 2019 & 2025
- Exhibit 26 Oil and Gas Seals Market Segmentation by Material
- Exhibit 27 Global Elastomers Oil and Gas Seals Market by 2019–2025 (\$ billion)
- Exhibit 28 Global Thermoplastics Oil and Gas Seals Market 2019–2025 (\$ billion)
- Exhibit 29 Global Oil and Gas Seals Market by Other Materials 2019–2025 (\$ billion)
- Exhibit 30 Incremental Growth by Product 2019 & 2025

- Exhibit 31 Oil and gas Seals Market Segmentation by Product Type
- Exhibit 32 Factors Contributing to the Growth of O-rings
- Exhibit 33 Global O-Rings Oil and Gas Seals Market 2019–2025 (\$ billion)
- Exhibit 34 Factors Driving Demand for U-cup Seals
- Exhibit 35 Global U-Cup Seals Oil and Gas Seals Market 2019–2025 (\$ billion)
- Exhibit 36 Global Back-Up Rings Oil and Gas Seals Market 2019–2025 (\$ billion)
- Exhibit 37 Global Spring-Energized Seals Oil and Gas Seals Market 2019–2025 (\$ billion)
- Exhibit 38 Global Oil and Gas Seals Market by Other Seals 2019–2025 (\$ million)
- Exhibit 39 Incremental Growth by Application 2019 & 2025
- Exhibit 40 Growth Momentum & Market Share by Application
- Exhibit 41 Oil and Gas Seals Market Segmentation by Application
- Exhibit 42 Global Oil and Gas Seals Market in Downstream Oil and Gas Industry 2019–2025 (\$ billion)
- Exhibit 43 Factors Impacting Upstream Industry
- Exhibit 44 Global Oil and Gas Seals Market in Upstream Oil and Gas Industry 2019–2025 (\$ billion)
- Exhibit 45 Opportunities for Growth in Midstream Oil and gas Industry
- Exhibit 46 Risks in Growth of Midstream Oil and gas Industry
- Exhibit 47 Global Oil and Gas Seals Market in Midstream Oil and Gas Industry 2019–2025 (\$ billion)
- Exhibit 48 Incremental Growth by Geography 2019 & 2025
- Exhibit 49 Geographical Snapshot
- Exhibit 50 Long-Term Growth Momentum by Geography
- Exhibit 51 Oil and Gas Seals Market in Middle East & Africa 2019–2025 (\$ billion)
- Exhibit 52 Incremental Growth in Middle East & Africa by Material Type 2019 & 2025
- Exhibit 53 Oil and Gas Seals Market in Middle East & Africa by Elastomers 2019–2025 (\$ million)
- Exhibit 54 Elastomer Seals: Market Dynamics in Middle East & Africa
- Exhibit 55 Oil and Gas Seals Market in Middle East & Africa by Thermoplastics 2019–2025 (\$ million)
- Exhibit 56 Thermoplastic Seals: Market Dynamics in Middle East & Africa
- Exhibit 57 Oil and Gas Seals Market in Middle East & Africa by Other Materials 2019–2025 (\$ million)
- Exhibit 58 Other Materials: Market Dynamics in Middle East & Africa
- Exhibit 59 Incremental Growth in Middle East & Africa by Product Type 2019 & 2025
- Exhibit 60 Oil and Gas Seals Market in Middle East & Africa by O-rings 2019–2025 (\$ million)
- Exhibit 61 O-rings: Market Dynamics in Middle East & Africa

- Exhibit 62 Oil and Gas Seals Market in Middle East & Africa by U-cup Seals 2019–2025 (\$ million)
- Exhibit 63 U-cup Seals: Market Dynamics in Middle East & Africa
- Exhibit 64 Oil and Gas Seals Market in Middle East & Africa by Back-up Rings 2019–2025 (\$ million)
- Exhibit 65 Back-up Rings: Market Dynamics in Middle East & Africa
- Exhibit 66 Oil and Gas Seals Market in Middle East & Africa by Spring-Energized Seals 2019–2025 (\$ million)
- Exhibit 67 Spring-Energized Seals: Market Dynamics in Middle East & Africa
- Exhibit 68 Oil and Gas Seals Market in Middle East & Africa by Others Product Types 2019–2025 (\$ million)
- Exhibit 69 Others Product Types: Market Dynamics in Middle East & Africa
- Exhibit 70 Incremental Growth in Middle East & Africa by Application 2019 & 2025
- Exhibit 71 Oil and Gas Seals Market in Middle East & Africa by Downstream Oil and Gas Industry 2019–2025 (\$ million)
- Exhibit 72 Downstream Oil and Gas Industry: Market Dynamics in Middle East & Africa
- Exhibit 73 Oil and Gas Seals Market in Middle East & Africa by Upstream Oil and Gas Industry 2019–2025 (\$ million)
- Exhibit 74 Upstream Oil and Gas Industry: Market Dynamics in Middle East & Africa
- Exhibit 75 Oil and Gas Seals Market in Middle East & Africa by Midstream Oil and Gas Industry 2019–2025 (\$ million)
- Exhibit 76 Midstream Oil and Gas Industry: Market Dynamics in Middle East & Africa
- Exhibit 77 Incremental Growth in Middle East & Africa 2019 & 2025
- Exhibit 78 Oil and Gas Seals Market in Saudi Arabia 2019–2025 (\$ million)
- Exhibit 79 Oil and Gas Seals Market in Iran 2019–2025 (\$ million)
- Exhibit 80 Crude Oil Production in Iraq 2010–2019 (thousand barrels per day)
- Exhibit 81 Oil and Gas Seals Market in Iraq 2019–2025 (\$ million)
- Exhibit 82 Oil and Gas Seals Market in UAE 2019–2025 (\$ million)
- Exhibit 83 Oil and Gas Seals Market in Rest of Middle East & Africa 2019–2025 (\$ million)
- Exhibit 84 Factors Contributing to the Growth of Oil & Gas Seals Market in North America
- Exhibit 85 Oil and Gas Seals Market in North America 2019–2025 (\$ billion)
- Exhibit 86 Incremental Growth in North America by Material Type 2019 & 2025
- Exhibit 87 Oil and Gas Seals Market in North America by Elastomers 2019–2025 (\$ million)
- Exhibit 88 Elastomer Seals: Market Dynamics in North America
- Exhibit 89 Oil and Gas Seals Market in North America by Thermoplastics 2019–2025 (\$ million)
- Exhibit 90 Thermoplastics Seals: Market Dynamics in North America

- Exhibit 91 Oil and Gas Seals Market in North America by Other Materials 2019–2025 (\$ million)
- Exhibit 92 Others Materials: Market Dynamics in North America
- Exhibit 93 Incremental Growth in North America by Product Type 2019 & 2025
- Exhibit 94 Oil and Gas Seals Market in North America by O-rings 2019–2025 (\$ million)
- Exhibit 95 O-rings: Market Dynamics in North America
- Exhibit 96 Oil and gas Seals Market in North America by U-cup Seals 2019–2025 (\$ million)
- Exhibit 97 U-cup Seals: Market Dynamics in North America
- Exhibit 98 Oil and Gas Seals Market in North America by Back-up Rings 2019–2025 (\$ million)
- Exhibit 99 Back-up Rings: Market Dynamics in North America
- Exhibit 100 Oil and gas Seals Market in North America by Spring Energized Seals 2019–2025 (\$ million)
- Exhibit 101 Spring Energized Seals: Market Dynamics in North America
- Exhibit 102 Oil and Gas Seals Market in North America by Other Product Type 2019–2025 (\$ million)
- Exhibit 103 Other Product Type: Market Dynamics in North America
- Exhibit 104 Incremental Growth in North America by Application 2019 & 2025
- Exhibit 105 Oil and gas Seals Market in North America by Downstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 106 Downstream Oil and gas Industry: Market Dynamics in North America
- Exhibit 107 Oil and gas Seals Market in North America by Upstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 108 Upstream Oil and gas Industry: Market Dynamics in North America
- Exhibit 109 Oil and Gas Seals Market in North America by Midstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 110 Midstream Oil and gas Industry: Market Dynamics in North America
- Exhibit 111 Incremental Growth in North America 2019 & 2025
- Exhibit 112 Crude Oil Production in US 2015-2019 (million barrels)
- Exhibit 113 Oil and Gas Seals Market in the US 2019–2025 (\$ million)
- Exhibit 114 Oil and Gas Seals Market in Canada 2019–2025 (\$ million)
- Exhibit 115 Statistical Overview of Oil and Gas industry in Europe
- Exhibit 116 Oil and Gas Seals Market in Europe 2019–2025 (\$ billion)
- Exhibit 117 Incremental Growth in Europe by Material Type 2019 & 2025
- Exhibit 118 Oil and Gas Seals Market in Europe by Elastomers 2019–2025 (\$ million)
- Exhibit 119 Elastomer Seals: Market Dynamics in Europe
- Exhibit 120 Oil and gas Seals Market in Europe by Thermoplastics 2019–2025 (\$ million)



- Exhibit 121 Thermoplastic Seals: Market Dynamics in Europe
- Exhibit 122 Oil and Gas Seals Market in Europe by Other Materials 2019–2025 (\$ million)
- Exhibit 123 Other Materials: Market Dynamics in Europe
- Exhibit 124 Incremental Growth in Europe by Product Type 2019 & 2025
- Exhibit 125 Oil and Gas Seals Market in Europe by O-rings 2019–2025 (\$ million)
- Exhibit 126 O-rings: Market Dynamics in Europe
- Exhibit 127 Oil and Gas Seals Market in Europe by U-cup Seals 2019–2025 (\$ million)
- Exhibit 128 U-cup Seals: Market Dynamics in Europe
- Exhibit 129 Oil and Gas Seals Market in Europe by Back-up Rings 2019–2025 (\$ million)
- Exhibit 130 Back-up Rings: Market Dynamics in Europe
- Exhibit 131 Oil and gas Seals Market in Europe by Spring Energized Seals 2019–2025 (\$ million)
- Exhibit 132 Elastomer Seals: Market Dynamics in Europe
- Exhibit 133 Oil and gas Seals Market in Europe by Other Product Type 2019–2025 (\$ million)
- Exhibit 134 Other Product Type: Market Dynamics in Europe
- Exhibit 135 Incremental Growth in Europe by Application 2019 & 2025
- Exhibit 136 Oil and gas Seals Market in Europe by Downstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 137 Downstream Oil and gas Industry: Market Dynamics in Europe
- Exhibit 138 Oil and gas Seals Market in Europe by Upstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 139 Upstream Oil and gas Industry: Market Dynamics in Europe
- Exhibit 140 Oil and gas Seals Market in Europe by Midstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 141 Midstream Oil & Gas Industry: Market Dynamics in Europe
- Exhibit 142 Incremental Growth in Europe 2019 & 2025
- Exhibit 143 Factors Affecting Oil and Gas Industry in Russia
- Exhibit 144 Oil and Gas Seals Market in Russia 2019–2025 (\$ million)
- Exhibit 145 Oil and Gas Seals Market in Norway 2019–2025 (\$ million)
- Exhibit 146 Oil and Gas Seals Market in Italy 2019–2025 (\$ million)
- Exhibit 147 Crude Oil Production in UK 2019 (thousand million barrels per day)
- Exhibit 148 Oil and gas Seals Market in UK 2019–2025 (\$ million)
- Exhibit 149 Oil and gas Seals Market in Denmark 2019–2025 (\$ million)
- Exhibit 150 Oil and gas Seals Market in APAC 2019–2025 (\$ billion)
- Exhibit 151 Incremental Growth in APAC by Material Type 2019 & 2025
- Exhibit 152 Oil and gas Seals Market in APAC by Elastomers 2019–2025 (\$ million)

- Exhibit 153 Elastomer Seals: Market Dynamics in APAC
- Exhibit 154 Oil and gas Seals Market in APAC by Thermoplastics 2019–2025 (\$ million)
- Exhibit 155 Thermoplastic Seals: Market Dynamics in APAC
- Exhibit 156 Oil and Gas Seals Market in APAC by Other Materials 2019–2025 (\$ million)
- Exhibit 157 Other Materials: Market Dynamics in APAC
- Exhibit 158 Incremental Growth in APAC by Product 2019 & 2025
- Exhibit 159 Oil and Gas Seals Market in APAC by O-rings 2019–2025 (\$ million)
- Exhibit 160 O-rings: Market Dynamics in APAC
- Exhibit 161 Oil and Gas Seals Market in APAC by U-cup Seals 2019–2025 (\$ million)
- Exhibit 162 U-cup Seals: Market Dynamics in APAC
- Exhibit 163 Oil and Gas Seals Market in APAC by Back-up Rings 2019–2025 (\$ million)
- Exhibit 164 Back-up Rings: Market Dynamics in APAC
- Exhibit 165 Oil and Gas Seals Market in APAC by Spring Energized Seals 2019–2025 (\$ million)
- Exhibit 166 Spring Energized Seals: Market Dynamics in APAC
- Exhibit 167 Oil and gas Seals Market in APAC by Other Product Type 2019–2025 (\$ million)
- Exhibit 168 Other Product Type: Market Dynamics in APAC
- Exhibit 169 Incremental Growth in APAC by Application 2019 & 2025
- Exhibit 170 Oil and gas Seals Market in APAC by Downstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 171 Downstream Oil and gas Industry: Market Dynamics in APAC
- Exhibit 172 Oil and gas Seals Market in APAC by Upstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 173 Upstream Oil and gas Industry: Market Dynamics in APAC
- Exhibit 174 Oil and gas Seals Market in APAC by Midstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 175 Midstream Oil and gas Industry: Market Dynamics in APAC
- Exhibit 176 Incremental Growth in APAC 2019 & 2025
- Exhibit 177 New Discoveries and Projects in China in FY2019
- Exhibit 178 Oil and Gas Seals Market in China 2019–2025 (\$ million)
- Exhibit 179 Favorable Conditions Driving the Growth of Oil and gas Seals Market in India
- Exhibit 180 Oil and Gas Seals Market in India 2019–2025 (\$ million)
- Exhibit 181 Oil and Gas Seals Market in Indonesia & Malaysia 2019–2025 (\$ million)
- Exhibit 182 Oil and gas Seals Market in Australia 2019–2025 (\$ million)
- Exhibit 183 Crude Oil Production in Japan October 2019 – June 2020 (Kilo Litres)
- Exhibit 184 Oil and Gas Seals Market in Rest of APAC 2019–2025 (\$ million)
- Exhibit 185 Oil and gas Seals Market in Latin America 2019–2025 (\$ billion)

- Exhibit 186 Incremental Growth in Latin America by Material Type 2019 & 2025
- Exhibit 187 Oil and Gas Seals Market in Latin America by Elastomers 2019–2025 (\$ million)
- Exhibit 188 Elastomer Seals: Market Dynamics in Latin America
- Exhibit 189 Oil and Gas Seals Market in Latin America by Thermoplastics 2019–2025 (\$ million)
- Exhibit 190 Thermoplastic Seals: Market Dynamics in Latin America
- Exhibit 191 Oil and Gas Seals Market in Latin America by Other Materials 2019–2025 (\$ million)
- Exhibit 192 Other Materials: Market Dynamics in Latin America
- Exhibit 193 Incremental Growth in Latin America by Product Type 2019 & 2025
- Exhibit 194 Oil and Gas Seals Market in Latin America by O-Rings 2019–2025 (\$ million)
- Exhibit 195 O-Rings: Market Dynamics in Latin America
- Exhibit 196 Oil and Gas Seals Market in Latin America by U-cup Seals 2019–2025 (\$ million)
- Exhibit 197 U-cup seals: Market Dynamics in Latin America
- Exhibit 198 Oil and gas Seals Market in Latin America by Back-up Rings 2019–2025 (\$ million)
- Exhibit 199 Back-up Rings Seals: Market Dynamics in Latin America
- Exhibit 200 Oil and Gas Seals Market in Latin America by Spring Energized Seals 2019–2025 (\$ million)
- Exhibit 201 Spring Energized Seals: Market Dynamics in Latin America
- Exhibit 202 Oil and Gas Seals Market in Latin America by Other Product Type 2019–2025 (\$ million)
- Exhibit 203 Other Product Type: Market Dynamics in Latin America
- Exhibit 204 Incremental Growth in Latin America by Application 2019 & 2025
- Exhibit 205 Oil and Gas Seals Market in Latin America by Downstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 206 Downstream Oil and Gas Industry: Market Dynamics in Latin America
- Exhibit 207 Oil and gas Seals Market in Latin America by Upstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 208 Upstream Oil and gas Industry: Market Dynamics in Latin America
- Exhibit 209 Oil and Gas Seals Market in Latin America by Midstream Oil and gas Industry 2019–2025 (\$ million)
- Exhibit 210 Midstream Oil and gas Industry: Market Dynamics in Latin America
- Exhibit 211 Incremental Growth in Latin America 2019 & 2025
- Exhibit 212 Oil and gas Seals Market in Mexico 2019–2025 (\$ million)
- Exhibit 213 Oil and Gas Market in Brazil 2019–2025 (\$ million)



## Exhibit 214 Oil and gas Seals Market in Rest of Latin America 2019–2025 (\$ million)

## List Of Tables

### LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2019

Table 3 New Upstream Projects 2020 & Beyond

Table 4 Global Elastomers Oil and Gas Seals Market by Geography 2019?2025 (\$ million)

Table 5 Global Thermoplastics Oil and Gas Seals Market by Geography 2019?2025 (\$ million)

Table 6 Global Other Materials Market by Geography 2019?2025 (\$ million)

Table 7 Global O-Rings Oil and Gas Seals Market by Geography 2019?2025 (\$ million)

Table 8 Global U-Cup Seals Oil and Gas Seals Market by Geography 2019?2025 (\$ million)

Table 9 Global Back-Up Rings Oil and Gas Seals Market 2019?2025 (\$ million)

Table 10 Global Spring-Energized Seals Oil and Gas Seals Market by Geography 2019?2025 (\$ million)

Table 11 Other Seals: Market by Geography 2019?2025 (\$ million)

Table 12 Global Oil and Gas Seals Market in Downstream Oil and Gas Industry by Geography 2019?2025 (\$ million)

Table 13 Global Oil and Gas Seals Market in Upstream Oil and Gas Industry by Geography 2019?2025 (\$ million)

Table 14 Global Oil and Gas Seals Market in Midstream Oil and Gas Industry 2019?2025 (\$ million)

Table 15 EnPro Industries: Major Product Offerings

Table 16 Flowserve Corporation: Major Product Offerings

Table 17 John Crane: Major Product Offerings

Table 18 Parker-Hannifin Corporation: Major Product Offerings

Table 19 Idex Corporation: Major Product Offerings

Table 20 Trelleborg: Major Product Offerings

Table 21 Freudenberg Oil and gas Technologies: Major Product Offerings

Table 22 M Barnwell Services: Major Product Offerings

Table 23 Green Tweed: Major Product Offerings

Table 24 CDI Energy Products: Major Product Offerings

Table 25 Aesseal: Major Product Offerings

Table 26 Saint-Gobain: Major Product Offerings

Table 27 Techno AD: Major Product Offerings

Table 28 Global Market by Material Type 2019?2025 (\$ billion)

Table 29 Global Market by Material Type 2019?2025 (% Revenue)
Table 30 Global Market by Product Type 2019?2025 (\$ billion)
Table 31 Global Market by Product Type 2019?2025 (% Revenue)
Table 32 Global Market by Application 2019?2025 (\$ billion)
Table 33 Global Market by Application 2019?2025 (% Revenue)
Table 34 Global Oil and gas Seals Market by Geography 2019?2025 (\$ billion)
Table 35 Global Oil and gas Seals Market by Geography 2019?2025 (% Revenue)
Table 36 Market by Material Type in Middle East & Africa 2019?2025 (\$ million)
Table 37 Market by Product Type in Middle East & Africa 2019?2025 (\$ million)
Table 38 Market by Application in Middle East & Africa 2019?2025 (\$ million)
Table 39 Market by Material Type in North America 2019?2025 (\$ million)
Table 40 Market by Product Type in North America 2019?2025 (\$ million)
Table 41 Market by Application in North America 2019?2025 (\$ million)
Table 42 Market by Material Type in Europe 2019?2025 (\$ million)
Table 43 Market by Product Type in Europe 2019?2025 (\$ million)
Table 44 Market by Application in Europe 2019?2025 (\$ million)
Table 45 Market by Material Type in APAC 2019?2025 (\$ million)
Table 46 Market by Product Type in APAC 2019?2025 (\$ million)
Table 47 Market by Application in APAC 2019?2025 (\$ million)
Table 48 Market by Material Type in Latin America 2019?2025 (\$ million)
Table 49 Market by Product Type in Latin America 2019?2025 (\$ million)
Table 50 Market by Application in Latin America 2019?2025 (\$ million)

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