

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?

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