

Global Oil and Gas NDT and Inspection Market Size Study, by Technique (Ultrasonic Testing, Visual, Magnetic Particle, Liquid Penetrant, Eddy-Current, Radiographic, Acoustic Emission), Component (Equipment, Software, and More) and Regional Forecasts 2025-2035

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Abstracts

The Global Oil and Gas NDT and Inspection Market was valued at approximately USD 3.73 billion in 2024 and is expected to expand at a robust CAGR of 8.80% throughout the forecast period of 2025–2035, with historical data captured for 2023 and 2024 and 2024 firmly established as the base year for estimation. Non-destructive testing (NDT) and inspection services in the oil and gas industry are designed to assess the integrity, reliability, and safety of critical assets without impairing their functionality. These techniques play a pivotal role across upstream, midstream, and downstream operations, enabling operators to detect material degradation, corrosion, cracks, and structural anomalies before they escalate into costly failures or safety incidents. As global energy infrastructure continues to age, NDT and inspection have become indispensable tools for asset life extension and risk mitigation.

Market growth is being powered by a convergence of stringent safety regulations, increasing operational complexity, and a heightened emphasis on preventive maintenance strategies. Oil and gas operators are scaling up inspection frequencies to comply with regulatory mandates while simultaneously striving to minimize unplanned downtime and environmental liabilities. Advanced inspection technologies, such as digital radiography and real-time ultrasonic testing, are being rolled out to replace conventional methods, thereby improving accuracy and decision-making speed. Although fluctuations in crude oil prices periodically temper capital expenditure, the non-

negotiable nature of safety compliance ensures that demand for NDT and inspection services continues to be carried forward steadily across the 2025–2035 forecast window.

The detailed segments and sub-segments included in the report are:

By Technique:

Ultrasonic Testing

Visual Inspection

Magnetic Particle Testing

Liquid Penetrant Testing

Eddy-Current Testing

Radiographic Testing

Acoustic Emission Testing

By Inspection Services:

Upstream Inspection Services

Midstream Inspection Services

Downstream Inspection Services

By Component:

Equipment

Software

More

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the various techniques, ultrasonic testing is expected to dominate the global oil and gas NDT and inspection market over the forecast period. Its ability to deliver high-precision, real-time data on internal defects and wall thickness measurements has made it a preferred choice across pipelines, pressure vessels, and offshore structures. Ultrasonic testing is increasingly being phased into automated and robotic inspection platforms, allowing operators to scale up inspection coverage while reducing human exposure to hazardous environments. While visual and magnetic particle testing remain widely used, ultrasonic methods are set to anchor market dominance due to their adaptability and technological advancements.

From a revenue perspective, radiographic testing currently contributes the largest share to the market, particularly in complex inspection scenarios where internal imaging and weld integrity assessment are critical. Radiographic techniques continue to be relied upon for high-risk assets, especially in refineries and offshore installations, where failure tolerance is minimal. At the same time, acoustic emission testing and eddy-current testing are emerging as fast-growing segments, as operators increasingly lean into continuous monitoring solutions that support predictive maintenance models rather than reactive interventions.

Geographically, North America holds a commanding position in the Global Oil and Gas NDT and Inspection Market, underpinned by an extensive network of aging pipelines, mature oilfields, and strict regulatory enforcement. The region's strong focus on shale gas production and offshore developments further amplifies inspection demand. Europe follows closely, driven by safety-centric regulatory frameworks and the modernization of legacy energy infrastructure. Asia Pacific is projected to register the fastest growth during the forecast period, fueled by expanding refining capacity, rising energy consumption, and significant investments in pipeline and LNG infrastructure across China and India. Meanwhile, the Middle East & Africa remains a strategically vital market, where large-scale upstream projects and high asset utilization rates sustain consistent demand for advanced inspection services.

Major market players included in this report are:

SGS S.A.

Bureau Veritas S.A.

Intertek Group plc

T?V S?D

T?V Rheinland

Applus+

Mistras Group, Inc.

Olympus Corporation

Acuren Inspection, Inc.

ALS Limited

DEKRA SE

Fujifilm Holdings Corporation

Zetec Inc.

Magnaflux

Team, Inc.

Global Oil and Gas NDT and Inspection Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue Forecast, Company Ranking, Competitive Landscape, Growth Factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments and countries in recent years and to forecast their values for the coming years. The report is structured to blend qualitative insight with quantitative analysis, capturing the operational realities of the oil and gas sector across the regions analyzed. It sheds light on critical growth drivers, regulatory challenges, and technological shifts that will shape market evolution, while also identifying high-potential micro-markets for strategic investment. Furthermore, the study delivers a detailed examination of the competitive landscape, highlighting service portfolios, strategic initiatives, and market positioning of leading companies active in the global oil and gas NDT and inspection ecosystem.

Key Takeaways:

Market estimates and forecasts spanning 10 years from 2025 to 2035.

Annualized revenue analysis with regional- and segment-level insights.

Detailed geographical assessment with country-level market evaluation.

Comprehensive competitive landscape profiling major industry participants.

Strategic analysis of key business initiatives and future market approaches.

In-depth evaluation of the competitive structure of the market.

Integrated demand-side and supply-side analysis to support informed decision-making.

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