

Global Pipeline Integrity Market Size Study & Forecast, by Service (Testing, Monitoring, Inspection, and Software Service), by Product (Oil, Gas, and Refined Product), by Application (Onshore and Offshore), and Regional Forecasts 2025-2035

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Abstracts

The Global Pipeline Integrity Market is valued approximately at USD 2.2 billion in 2024 and is anticipated to expand at a compound annual growth rate (CAGR) of more than 4.34% over the forecast period 2025–2035. Pipeline integrity management plays a critical role in ensuring the safe, reliable, and cost-effective transportation of vital resources such as oil, gas, and refined products across vast terrains. With growing global reliance on pipeline networks, especially in remote and harsh environments, there has been a significant uptick in the demand for robust integrity solutions. From detection of micro-leaks and structural fatigue to real-time monitoring of corrosion and pressure anomalies, integrity services are enabling pipeline operators to proactively mitigate environmental hazards, reduce downtime, and extend asset lifecycles. The rising energy consumption, coupled with aging pipeline infrastructure and growing regulatory oversight across regions, has further compelled operators to invest heavily in preventive maintenance and integrity solutions.

Accelerated infrastructure investments in oil & gas and cross-border energy distribution are serving as catalysts for the market. According to the International Energy Agency (IEA), global energy demand is expected to grow by over 25% by 2040, a projection that hinges on the continued expansion of pipeline networks. Innovations such as smart pigging, AI-driven monitoring systems, and drone-based inspection methods are transforming pipeline surveillance and asset performance tracking. Moreover, technological convergence has enabled the integration of SCADA (Supervisory Control and Data Acquisition) with predictive analytics, giving pipeline operators real-time

visibility into potential threats. However, despite these advancements, the market grapples with challenges such as high implementation costs, complex regulatory compliance standards across borders, and vulnerabilities to cyber threats. Nevertheless, increasing digital transformation in the energy sector and the emergence of cloud-based software services offer new avenues for sustainable growth.

Regionally, North America commanded a dominant share of the market in 2024 and is poised to retain its stronghold through 2035, primarily driven by a mature energy transportation network, early adoption of smart integrity technologies, and stringent regulatory frameworks such as those enforced by PHMSA (Pipeline and Hazardous Materials Safety Administration). The U.S. and Canada continue to be frontrunners in adopting automated monitoring and advanced pipeline assessment tools. In contrast, the Asia-Pacific region is emerging as the fastest-growing market, fueled by massive infrastructure development across emerging economies like India, China, and Southeast Asia. The growing focus on energy security, urbanization-led demand, and national strategies to expand intra-country gas transmission pipelines are accelerating investment into pipeline integrity services. Meanwhile, countries in Europe are prioritizing environmental compliance and carbon-neutral transport systems, creating demand for advanced inspection and leakage detection technologies. The Middle East and Latin America are also witnessing an upsurge in offshore exploration activities, demanding robust offshore pipeline integrity frameworks.

Major market player included in this report are:

Halliburton Company

Baker Hughes Company

Schlumberger Limited

Chevron Phillips Chemical Company

Trican Well Service Ltd.

Croda International Plc.

BASF SE

Impact Fluid Solutions

M&D Industries Of Louisiana, Inc.

Aubin Group

EnerMech

T.D. Williamson, Inc.

LIN SCAN

DNV GL

Applus+

Global Pipeline Integrity 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 up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial

aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Service:

Testing

Monitoring

Inspection

Software Service

By Product:

Oil

Gas

Refined Product

By Application:

Onshore

Offshore

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

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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