

Pipeline Transport Market Forecasts to 2034 – Global Analysis By Commodity (Crude Oil, Refined Petroleum Products, Natural Gas, Chemicals, Water, Carbon Dioxide, and Slurry and Bulk Fluids), Pipeline Type, Service Type, End-Use Industry, and By Geography

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Abstracts

According to Statistics MRC, the Global Pipeline Transport Market is accounted for \$30.1 billion in 2026 and is expected to reach \$61.3 billion by 2034 growing at a CAGR of 9.3% during the forecast period. Pipeline transport involves the movement of fluids, gases, and slurries through networks of interconnected pipes, pumping stations, and control systems, serving as the most economical and efficient mode for long-distance commodity transport. This infrastructure backbone supports global energy security by enabling continuous, reliable delivery of crude oil, natural gas, refined products, and industrial chemicals. The market encompasses extensive onshore and offshore networks, transmission and distribution pipelines, and cross-border systems that connect production regions with consumption centers worldwide.

Market Dynamics:

Driver:

Rising global energy demand and industrial expansion

This factor is significantly driving pipeline transport market growth as emerging economies increase consumption of oil, natural gas, and refined products. Rapid industrialization across Asia Pacific and Africa requires reliable, high-volume transport infrastructure to move energy resources from production sites to refineries and end-users. Pipelines offer superior cost efficiency compared to rail or truck transport,

particularly for continuous, large-volume shipments over long distances. As international energy trade expands and new production regions come online, pipeline networks are being extended to connect remote reserves with demand centers, creating sustained investment in both new construction and existing system upgrades.

Restraint:

High capital expenditure and regulatory hurdles

This factor significantly restrains market growth as pipeline projects require massive upfront investments and extensive approval processes. Constructing a single cross-country pipeline can cost billions of dollars before any revenue is generated, with lengthy planning, environmental assessment, and land acquisition phases spanning several years. Regulatory frameworks across multiple jurisdictions create compliance complexities, particularly for cross-border and offshore projects that must satisfy varying safety, environmental, and operational standards. Permitting delays, legal challenges from environmental groups, and changing political landscapes often extend project timelines beyond initial projections, increasing carrying costs and reducing return on investment for pipeline operators and their financial backers.

Opportunity:

Expansion of carbon capture and hydrogen transport infrastructure

This factor presents transformative opportunities for pipeline transport markets as decarbonization initiatives accelerate worldwide. Carbon dioxide pipelines are becoming essential for carbon capture, utilization, and storage (CCUS) projects that transport captured emissions from industrial sources to permanent storage sites. Similarly, emerging hydrogen economies require dedicated pipeline networks to move green hydrogen from production facilities to industrial users and power generation stations. Governments and energy companies are investing heavily in CO₂ and hydrogen transport corridors, repurposing existing natural gas pipelines or constructing new dedicated systems. This diversification beyond traditional hydrocarbon transport opens substantial growth avenues for pipeline infrastructure development.

Threat:

Environmental risks and climate change activism

This factor poses significant threats to pipeline transport markets through heightened public scrutiny and legal opposition. Major pipeline projects face coordinated campaigns from environmental organizations, Indigenous groups, and climate activists citing risks of leaks, spills, and contribution to greenhouse gas emissions. High-profile incidents such as oil spills into sensitive ecosystems have damaged public trust and prompted stricter regulatory enforcement. Investor pressure on financial institutions to divest from fossil fuel infrastructure has increased capital costs for pipeline developers. Insurance premiums for pipeline operators have risen substantially due to environmental liability concerns, while some jurisdictions have implemented moratoriums on new fossil fuel pipeline approvals.

Covid-19 Impact:

The COVID-19 pandemic significantly disrupted pipeline transport markets through reduced energy demand, project delays, and supply chain interruptions. Lockdown measures and travel restrictions caused unprecedented declines in oil and refined product consumption, forcing pipeline operators to reduce throughput volumes and implement storage solutions. Major pipeline construction projects experienced workforce shortages, material delivery delays, and permitting setbacks, pushing completion timelines beyond original schedules. However, the pandemic also highlighted pipeline reliability advantages over more vulnerable transport modes, as essential energy supplies continued moving through automated systems. The subsequent economic recovery triggered renewed infrastructure investment, with governments prioritizing energy security through pipeline modernization and expansion initiatives.

The Natural Gas segment is expected to be the largest during the forecast period

The Natural Gas segment is expected to account for the largest market share during the forecast period, driven by natural gas's role as a transition fuel in global decarbonization strategies. Extensive pipeline networks connect natural gas production fields to power generation plants, industrial facilities, and residential heating systems across mature and emerging markets. The fuel's cleaner-burning profile compared to coal has prompted fuel-switching policies in many countries, sustaining natural gas demand even as renewable energy expands. Long-term supply contracts and regulated tariff structures provide pipeline operators with predictable revenue streams for natural gas transport. The proliferation of liquefied natural gas (LNG) import terminals has further extended pipeline distribution networks to serve previously unreachable markets.

The Offshore pipelines segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Offshore pipelines segment is predicted to witness the highest growth rate, fueled by increasing deepwater exploration activities and subsea field development projects. Offshore pipeline installations are essential for transporting hydrocarbons from subsea production systems to floating platforms or onshore processing facilities, with technological advances enabling operations in increasingly challenging water depths. The discovery of major offshore reserves in regions including Brazil's pre-salt basin, Guyana's Stabroek block, and East Africa's gas fields drives substantial pipeline investment. Subsea tieback technologies allowing remote wells to connect to existing infrastructure have improved project economics. As onshore pipeline construction faces mounting opposition, offshore alternatives face comparatively fewer land-use conflicts, supporting accelerated deployment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by the continent's extensive existing pipeline network and continued infrastructure investment. The United States and Canada operate the world's most comprehensive pipeline systems, moving crude oil from production regions including the Permian Basin and Western Canadian Sedimentary Basin to refining centers and export terminals. Natural gas pipeline density is particularly high, connecting numerous producing shale plays to population centers and industrial consumers. Regulatory frameworks, while complex, provide established pathways for project approval. The region's energy independence goals and cross-border energy trade between the US, Canada, and Mexico ensure sustained pipeline utilization and incremental capacity additions throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapidly growing energy demand and strategic investments in pipeline infrastructure. China and India are expanding domestic pipeline networks to support their positions as manufacturing hubs and to improve energy access across vast territories. Natural gas pipeline development is particularly active, supporting coal-to-gas switching policies aimed at reducing urban air pollution. Cross-border pipeline projects, including those connecting Central Asian and Russian supply to Chinese demand centers, continue to advance. The region's large population and

industrialization trajectory create sustained throughput requirements, while government-backed infrastructure spending programs provide financing for long-duration pipeline construction across challenging terrain and multiple jurisdictions.

Key players in the market

Some of the key players in Pipeline Transport Market include Enbridge Inc., Kinder Morgan, Inc., TC Energy Corporation, Energy Transfer LP, Enterprise Products Partners L.P., The Williams Companies, Inc., ONEOK, Inc., Plains All American Pipeline, L.P., Pembina Pipeline Corporation, MPLX LP, Cheniere Energy, Inc., ABB Ltd., Emerson Electric Co., Schneider Electric SE, Siemens AG, Honeywell International Inc., Baker Hughes Company, TechnipFMC plc, Tenaris S.A., and Welspun Corp Limited.

Key Developments:

In May 2026, Pembina Pipeline Corporation formally sanctioned the development of the Heartland Extraction Plant, a massive \$570 million, 750 MMcf/d NGL straddle facility tied to its Yellowhead Pipeline infrastructure. The installation is backed by an expanded long-term supply agreement to deliver 57,500 barrels per day of ethane to Dow Chemical beginning in late 2029.

In May 2026, MPLX LP announced an extensive infrastructure layout anchored in the Permian and Marcellus basins. Key midstream milestones revealed for 2026 include expanding the BANGL Pipeline up to 300 mbpd, advancing the 2.5 Bcf/d Blackcomb Pipeline, and fast-tracking the Harmon Creek III processing unit for a Q3 2026 launch.

In April 2026, Enbridge Inc. announced that the Canadian Government granted federal approval for its \$4 billion Sunrise Expansion Program in British Columbia. The shovel-ready natural gas infrastructure project involves constructing new pipeline segments and additional natural gas compression to support major regional expansion, including industrial development and LNG export facilities.

Commodities Covered:

Crude oil

Refined petroleum products

Natural gas

Chemicals

Water

Carbon dioxide

Slurry and bulk fluids

Pipelines Types Covered:

Onshore pipelines

Offshore pipelines

Domestic pipelines

Cross-border pipelines

Transmission pipelines

Distribution pipelines

Service Types Covered:

Transportation

Monitoring and control

Inspection and maintenance

Expansion and upgrade services

Storage integration services

End-Use Industries Covered:

Oil and gas

Chemicals and petrochemicals

Water utilities

Mining

Power and energy

Industrial manufacturing

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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