

Asia-Pacific Oil and Gas Midstream Market By Technology (Pipeline Monitoring Systems, SCADA Systems, Control Valves and Actuators, Leak Detection Systems, Advanced Metering Infrastructure), By Product (Crude Oil, Natural Gas, Liquefied Natural Gas (LNG), Refined Petroleum Products), By Operation (Gathering, Processing, Transportation, Storage, Distribution), By Country, Competition, Forecast and Opportunities 2020-2030F

<https://marketpublishers.com/r/A0F3EDA568E1EN.html>

Date: May 2025

Pages: 120

Price: US\$ 4,000.00 (Single User License)

ID: A0F3EDA568E1EN

Abstracts

Market Overview

The Asia-Pacific Oil and Gas Midstream Market was valued at USD 10.45 billion in 2024 and is expected to reach USD 12.72 billion by 2030, growing at a CAGR of 3.17% during the forecast period. This market segment is instrumental in linking upstream production to downstream consumption by enabling efficient transportation, processing, and storage of hydrocarbons. Rapid industrialization, urban growth, and energy demand in countries like China, India, and Indonesia are fueling large-scale investments in midstream infrastructure, including pipelines, LNG terminals, and storage facilities. Regional priorities such as energy security, cleaner fuel adoption, and cross-border connectivity are driving public and private sector initiatives across the region. Projects focused on strengthening national gas grids and LNG import capabilities reflect a shift toward natural gas as a transitional fuel in the broader decarbonization agenda.

Key Market Drivers

Rising Energy Demand Across Asia-Pacific

Accelerated economic growth, expanding urban populations, and rapid industrialization are significantly increasing energy consumption across the Asia-Pacific region. Nations such as China and India lead the global growth in energy demand, which necessitates extensive midstream infrastructure to facilitate reliable fuel transport and storage. Countries are actively expanding gas pipeline networks and LNG regasification terminals to meet domestic and industrial needs. China's expanding pipeline grid and India's national gas grid and strategic reserves exemplify the regional push to strengthen midstream logistics and ensure uninterrupted fuel supply. This demand is directly translating into heightened investment and development across midstream systems to support energy accessibility and long-term sustainability.

Key Market Challenges

High Capital and Operational Costs

The construction and maintenance of midstream infrastructure—such as pipelines and LNG terminals—require high capital expenditure, particularly in geographically diverse or remote regions. Developing economies in the region often face difficulties securing financing for such large-scale projects. Offshore projects and advanced LNG storage facilities further inflate costs due to complex engineering requirements and safety standards. Cost overruns and funding shortfalls have led to delays or cancellations of midstream projects in Southeast Asia, impeding regional energy integration and limiting access to cleaner fuel alternatives. Additionally, long project timelines and uncertain returns on investment, compounded by commodity price fluctuations, deter private investment and slow infrastructure growth.

Key Market Trends

Expansion of Cross-Border and Regional Energy Connectivity

Governments across Asia-Pacific are emphasizing interconnected midstream systems through cross-border pipeline networks and LNG infrastructure to boost energy trade and regional cooperation. Projects like the Trans ASEAN Gas Pipeline (TAGP) and China-Myanmar Oil and Gas Pipeline exemplify this trend, offering strategic bypasses and improved fuel flow across multiple countries. This integration enhances regional energy security, allows smaller economies to access diversified energy sources, and promotes collaborative resilience to global supply chain disruptions. Additionally, joint ventures and

regional agreements are emerging to support shared pipeline infrastructure and regasification capacity, creating new opportunities for midstream service providers and investors.

Key Market Players

Kinder Morgan Inc.

Enbridge Inc.

Enterprise Products Partners L.P.

TransCanada Corporation (now TC Energy)

Magellan Midstream Partners L.P.

Plains All American Pipeline L.P.

Williams Companies Inc.

Energy Transfer LP

Phillips 66 Partners L.P.

ONEOK Inc.

Report Scope

In this report, the Asia-Pacific Oil and Gas Midstream Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asia-Pacific Oil and Gas Midstream Market, By Technology:

Pipeline Monitoring Systems

SCADA Systems

Control Valves and Actuators

Leak Detection Systems

Advanced Metering Infrastructure

Asia-Pacific Oil and Gas Midstream Market, By Product:

Crude Oil

Natural Gas

Liquefied Natural Gas (LNG)

Refined Petroleum Products

Asia-Pacific Oil and Gas Midstream Market, By Operation:

Gathering

Processing

Transportation

Storage

Distribution

Asia-Pacific Oil and Gas Midstream Market, By Country:

China

Japan

India

South Korea

Australia

Singapore

Thailand

Malaysia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Asia-Pacific Oil and Gas Midstream Market.

Available Customizations

Asia-Pacific Oil and Gas Midstream Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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