

# **Asia-Pacific Pigging Services Market By Pigging Type (Magnetic Flux Leakage (MFL) Pigging, Ultrasonic Test Pigging, Utility Pigging, Caliper Pigging and Others), By Application (Crack and Leakage Detection, Metal Loss/Corrosion Detection, Geometry Measurement and Bend Detection and Others), By Country, Competition, Forecast and Opportunities, 2020-2030F**

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## **Abstracts**

### Market Overview

The Asia-Pacific Pigging Services Market was valued at USD 964.78 Million in 2024 and is projected to reach USD 1,318.01 Million by 2030, growing at a CAGR of 5.18% during the forecast period. The market is witnessing steady growth due to the rising need for effective pipeline maintenance, growing focus on operational safety, and expansion of the oil, gas, and water sectors in the region. Pigging involves using devices called “pigs” to clean, inspect, and maintain pipelines without interrupting flow. In countries such as China, India, Australia, and across Southeast Asia, the importance of uninterrupted operations and the prevention of corrosion or blockages has made pigging an integral part of pipeline management. Aging infrastructure across the region’s energy sectors has increased the frequency of maintenance and inspection, fueling demand for pigging services. Moreover, stricter safety and environmental regulations have accelerated the adoption of intelligent pigging technologies capable of delivering real-time diagnostics and enhancing pipeline integrity.

## Key Market Drivers

### Aging Pipeline Infrastructure Demands Regular Maintenance

The aging oil, gas, and water pipeline infrastructure across Asia-Pacific is a major driver of pigging services. Many existing pipelines, installed decades ago, are approaching or have surpassed their intended life spans, creating a heightened need for routine inspection and maintenance. Pigging technologies, especially smart pigging systems, are critical for preventing failures, leaks, and costly outages. In countries like Japan and South Korea, aging energy infrastructure is prompting a shift toward predictive and preventive maintenance using non-intrusive inspection tools. Intelligent pigs can detect corrosion, cracks, and deformation without disrupting operations, making them essential for extending the lifespan of older pipelines while ensuring safety and efficiency.

## Key Market Challenges

### High Initial Investment and Operating Costs

One of the primary challenges in the Asia-Pacific pigging services market is the high cost associated with advanced pigging technologies. Intelligent pigs equipped with high-end sensors such as ultrasonic and magnetic flux leakage systems require substantial capital investment. In addition, the need for specialized components—like pig launchers, receivers, and isolation valves—often necessitates costly upgrades to existing pipeline systems. For small and mid-sized operators in markets like Indonesia, Vietnam, and Bangladesh, these expenses can be prohibitive. Operational costs related to skilled labor, maintenance, and sensor calibration further increase the burden, particularly in areas with limited service provider availability. Consequently, smaller operators may delay inspections or opt for basic cleaning solutions, which could compromise pipeline integrity over time.

## Key Market Trends

### Increased Use of Pigging in Water and Wastewater Pipelines

While traditionally used in the oil and gas industry, pigging services are increasingly being applied in water and wastewater infrastructure across Asia-Pacific. Urbanization in countries such as India, Indonesia, and Vietnam has placed immense pressure on aging municipal water systems, driving the need for effective pipeline cleaning and inspection. Pigging helps address issues such as scale buildup, corrosion, and biofilm

formation, which can affect water quality and pressure. Utilities in regions like Australia and Singapore have integrated pigging into their routine maintenance practices, using foam and gel pigs to remove contaminants without resorting to chemical treatments. Additionally, the integration of remote monitoring and smart sensors tailored for water systems is enabling better leak detection and sediment control. This trend is expected to continue as cities aim to improve service delivery, meet regulatory standards, and reduce non-revenue water losses.

### Key Market Players

Rosen Group

T.D. Williamson, Inc.

Romstar Sdn. Bhd.

Dacon Inspection Services Co., Ltd.

Baker Hughes Company

Enduro Pipeline Services, Inc.

NDT Global Services Ltd.

Onstream Pipeline Inspection Services Ltd.

IKM Gruppen AS

Penspen Limited

### Report Scope:

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

Asia-Pacific Pigging Services Market, By Pigging Type:

Magnetic Flux Leakage (MFL) Pigging

Ultrasonic Test Pigging

Utility Pigging

Caliper Pigging

Others

Asia-Pacific Pigging Services Market, By Application:

Crack and Leakage Detection

Metal Loss/Corrosion Detection

Geometry Measurement and Bend Detection

Others

Asia-Pacific Pigging Services 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 Pigging Services Market.

## Available Customizations:

Asia-Pacific Pigging Services 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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