

Midstream Oil and Gas Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Pipes, Rail Tank Cars, Gas Processing Equipment, Storage Tanks, Pumps, Valves & Compressors), By Application (Pipelines, Natural Gas Processing Plant, LNG/LPG Facilities, Crude by Rail, Others), By Region, By Competition, 2018-2028

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Abstracts

Global Midstream Oil and Gas Equipment Market was valued at USD 32.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.19% through 2028.

Midstream oil and gas equipment refers to a specialized category of equipment and infrastructure within the energy industry that plays a crucial role in the transportation, storage, and distribution of crude oil, natural gas, and related products. This sector serves as the intermediary link between upstream (exploration and production) and downstream (refining and marketing) activities in the oil and gas supply chain.

Key components of midstream oil and gas equipment include pipelines, compressor stations, storage tanks, terminals, pumps, meters, and various control systems. These assets are strategically positioned to facilitate the safe and efficient movement of hydrocarbons from production sites, such as oilfields and gas wells, to downstream facilities like refineries, petrochemical plants, and distribution networks.

The primary objectives of midstream infrastructure are to ensure a reliable supply of oil

and gas products, maintain product quality and safety during transit and storage, and optimize logistical operations. This sector also plays a critical role in responding to market demand fluctuations and global energy distribution.

Overall, midstream oil and gas equipment is a vital component of the energy value chain, enabling the transportation and delivery of essential energy resources to consumers and industries around the world.

Key Market Drivers

Energy Demand and Supply

The global midstream oil and gas equipment industry is heavily influenced by the fundamental driver of energy demand and supply. As the world's population continues to grow, so does the need for energy resources, especially oil and natural gas. These hydrocarbons remain essential sources of energy for transportation, heating, electricity generation, and various industrial processes.

Global energy demand is driven by economic growth, urbanization, and industrialization in emerging economies, which rely heavily on oil and gas for their energy needs. Additionally, developed nations continue to consume significant quantities of these resources. Consequently, the midstream sector plays a crucial role in ensuring a steady supply of oil and gas from production sites to end-users, such as refineries, power plants, and distribution networks.

Infrastructure Development

Infrastructure development is another critical driver of the midstream oil and gas equipment industry. This encompasses the construction and maintenance of pipelines, storage tanks, terminals, compressor stations, and other facilities that facilitate the transportation and storage of oil and gas.

As energy demand continues to rise, there is a need to expand and upgrade existing infrastructure to meet the growing requirements. For example, the shale gas boom in the United States has prompted extensive investments in pipeline networks and processing facilities to transport and process the newfound natural gas reserves. Similarly, the expansion of offshore oil exploration activities requires investments in offshore platforms, subsea pipelines, and floating storage units.

Regulatory Environment

The regulatory environment significantly influences the midstream oil and gas equipment industry. Governments and regulatory bodies establish rules and standards to ensure safety, environmental protection, and fair competition within the industry.

Environmental regulations, in particular, have become increasingly stringent in response to concerns about climate change and environmental sustainability. This has led to the development of cleaner energy sources and technologies. The midstream sector must adapt to these evolving regulations by incorporating environmentally friendly practices, such as leak detection systems, emissions controls, and pipeline integrity management.

Technological Advancements

Technological advancements are driving innovation within the midstream oil and gas equipment industry. New technologies are improving the efficiency, safety, and reliability of equipment and processes. Automation, data analytics, and remote monitoring are revolutionizing the way midstream operations are managed.

For instance, the adoption of advanced sensors and monitoring systems allows operators to detect and respond to leaks or other issues in real-time, reducing the risk of accidents and environmental damage. Additionally, the development of smart pipelines and control systems enhances the overall performance and maintenance of midstream infrastructure.

Geopolitical Factors

Geopolitical factors can significantly impact the midstream oil and gas equipment industry. The industry is vulnerable to disruptions caused by geopolitical conflicts, trade disputes, and sanctions. Political stability in major oil and gas-producing regions is crucial for ensuring a stable supply chain.

For example, tensions in the Middle East can disrupt the flow of oil through critical shipping routes like the Strait of Hormuz, affecting global energy markets. Sanctions imposed on certain oil-producing nations can also impact the availability of oil and gas on the international market.

In conclusion, the global midstream oil and gas equipment industry is shaped by a combination of drivers, including energy demand and supply, infrastructure

development, regulatory environment, technological advancements, and geopolitical factors. Understanding and effectively navigating these drivers is essential for companies operating in this dynamic sector.

Government Policies are Likely to Propel the Market

Safety and Environmental Regulations

Safety and environmental regulations are paramount in the midstream oil and gas equipment industry. Governments worldwide establish stringent rules to ensure the safe transportation, storage, and handling of oil and gas products while minimizing the environmental impact of these activities.

Safety regulations often require midstream companies to implement measures such as regular inspections, maintenance of emergency response plans, and the use of advanced technologies to prevent accidents like pipeline leaks or oil spills. Additionally, environmental policies aim to reduce greenhouse gas emissions and promote sustainable practices, encouraging the development and adoption of cleaner technologies and eco-friendly practices.

Infrastructure Development and Investment

Governments often play a pivotal role in promoting infrastructure development within the midstream oil and gas sector. To ensure energy security and stimulate economic growth, governments may invest in or incentivize private investments in pipelines, storage facilities, and transportation networks.

These infrastructure investments facilitate the efficient movement of oil and gas while creating jobs and stimulating economic activity in the regions where they are located. Governments often collaborate with industry stakeholders to plan and execute large-scale infrastructure projects, ensuring alignment with national energy goals and policies.

Energy Security and Supply Diversity

Energy security is a top priority for governments, and related policies have significant impacts on the midstream oil and gas equipment industry. Governments implement strategies to diversify energy sources and supply routes, reducing dependence on a single supplier or transportation route.

This may involve supporting the development of alternative energy sources like renewable energy and natural gas to reduce reliance on oil. Governments may also promote investments in strategic reserves and establish emergency response mechanisms to mitigate supply disruptions caused by geopolitical conflicts or natural disasters.

Taxation and Royalties

Taxation and royalty policies are crucial considerations for midstream companies. Governments typically levy taxes and royalties on oil and gas production, transportation, and storage activities. The rates and structures of these taxes significantly impact a company's profitability and investment decisions.

Governments may adjust tax policies to incentivize or disincentivize specific activities within the midstream sector. For instance, tax incentives might be offered to encourage investments in cleaner technologies or to promote the development of infrastructure in underdeveloped regions. Conversely, governments may increase taxes or royalties during periods of high oil

Trade and Export Regulations

International trade and export policies also have a substantial influence on the midstream oil and gas equipment industry, particularly for companies involved in cross-border operations. Governments establish trade agreements, tariffs, and export restrictions that affect the movement of oil and gas equipment and products.

Changes in trade policies, such as trade disputes or the imposition of trade barriers, can disrupt global supply chains and impact the midstream industry's access to international markets. Companies must stay informed about trade regulations and adapt their strategies accordingly to navigate this complex landscape.

Environmental Conservation and Climate Change Mitigation

In recent years, there has been a growing emphasis on environmental conservation and climate change mitigation. Governments worldwide are implementing policies to reduce carbon emissions and transition to cleaner energy sources. These policies have direct implications for the midstream oil and gas equipment industry.

Governments may impose emissions reduction targets, carbon pricing mechanisms, or

incentives for the adoption of low-carbon technologies in the midstream sector. Additionally, they may support the development of infrastructure for alternative fuels, such as hydrogen or electric charging stations, to promote cleaner transportation options.

In conclusion, government policies are instrumental in shaping the global midstream oil and gas equipment industry. Safety and environmental regulations, infrastructure development, energy security, taxation, trade, and climate change policies all influence industry operations and competitiveness. Staying informed and complying with these policies are essential for industry participants to operate successfully in a highly regulated and evolving landscape.

Key Market Challenges

Aging Infrastructure and Maintenance

One of the most pressing challenges facing the global midstream oil and gas equipment industry is the aging infrastructure and the associated maintenance requirements. Many midstream assets, such as pipelines, storage tanks, and terminals, were built decades ago and are now approaching or have exceeded their intended service life.

Aging infrastructure poses several critical concerns:

Safety and Reliability: Older equipment and pipelines are more susceptible to corrosion, leaks, and other mechanical failures. This can compromise the safety of operations and lead to environmental hazards.

Efficiency and Capacity: Aging infrastructure may not meet the current demands of the industry in terms of capacity and efficiency. This can result in bottlenecks, delays, and increased operational costs.

Regulatory Compliance: As safety and environmental regulations become more stringent, aging infrastructure may struggle to meet compliance standards, requiring costly upgrades and retrofits.

Addressing this challenge requires substantial investments in infrastructure maintenance, repair, and replacement. Companies must develop comprehensive asset integrity management programs that include regular inspections, maintenance schedules, and the use of advanced technologies like inline inspection tools (smart

pigs) to monitor pipeline conditions. Collaboration with regulators and adherence to safety standards are also crucial in ensuring the continued safe and reliable operation of midstream assets.

Environmental Sustainability and Transition to Clean Energy

The second significant challenge facing the global midstream oil and gas equipment industry is the growing emphasis on environmental sustainability and the transition to clean energy sources. The industry is under increasing pressure to reduce its carbon footprint and minimize its environmental impact in the face of climate change concerns.

This challenge presents several complexities:

Emissions Reduction: The midstream sector is a significant source of greenhouse gas emissions, primarily through methane leakage during transportation and storage. Reducing these emissions while maintaining operational efficiency is a formidable challenge.

Investment in Cleaner Technologies: The transition to cleaner energy sources, such as renewables and hydrogen, requires substantial investments in new infrastructure and technologies, often with uncertain returns on investment.

Regulatory Compliance: Governments worldwide are implementing stricter environmental regulations and carbon pricing mechanisms. Midstream companies must navigate complex compliance requirements while ensuring economic viability.

To address this challenge, midstream companies are increasingly adopting environmentally friendly practices. This includes the use of advanced leak detection technologies, implementing emissions reduction measures, and exploring opportunities to invest in renewable energy and alternative fuels infrastructure. Collaboration with regulators and stakeholders to develop and adhere to sustainability standards is critical in navigating the industry's transition to a more sustainable future.

In conclusion, the global midstream oil and gas equipment industry faces significant challenges related to aging infrastructure and maintenance, as well as the imperative to embrace environmental sustainability and transition to cleaner energy sources. Successfully addressing these challenges requires a combination of strategic planning, investment, collaboration, and adherence to evolving regulatory standards. Adapting to these challenges is essential for the long-term viability and relevance of the industry in a

changing energy landscape.

Segmental Insights

Pipes Insights

The Pipes segment held the largest market share in 2022 & expected to maintain it in the forecast period. Pipelines are highly efficient and cost-effective means of transporting large volumes of oil and natural gas over long distances. They minimize the need for frequent handling, reducing labor costs, and the risk of accidents compared to alternative transportation methods such as rail or truck. Pipelines are considered one of the safest modes of transporting oil and gas. They are less susceptible to accidents, leaks, and spills compared to other transportation options, reducing environmental and safety risks. Pipelines allow for a continuous flow of oil and gas, ensuring a consistent supply to refineries, distribution centers, and export terminals. This reliability is crucial for meeting energy demands. Pipelines have a smaller carbon footprint compared to other transportation methods, as they typically require less energy and produce fewer emissions per unit of transported product. This aligns with growing environmental sustainability concerns. Pipelines are often seen as long-term infrastructure investments, providing a stable and predictable means of transporting energy resources over several decades. This makes them attractive to investors and energy companies looking for consistent returns. Pipelines have the capacity to transport large volumes of oil and gas, making them ideal for major energy production regions with substantial output. They can accommodate the demands of both domestic and international markets. In many regions, governments and regulatory bodies support the development of pipeline infrastructure due to its efficiency and safety advantages. This regulatory support can facilitate the expansion and maintenance of pipeline networks. Pipelines can provide greater energy security by avoiding potential geopolitical conflicts associated with other transportation methods, such as maritime shipping through disputed regions. Pipelines work in tandem with other midstream equipment, such as storage tanks, pumps, valves, and compressors, enhancing the overall efficiency and reliability of the midstream infrastructure.

Natural Gas Processing Plant Insights

The Natural Gas Processing Plant segment held the largest market share in 2022 and is projected to experience rapid growth during the forecast period. With the growth in natural gas production, driven by technologies like hydraulic fracturing (fracking) and horizontal drilling, the need for Natural Gas Processing Plants has increased. These

facilities extract valuable natural gas liquids (NGLs) and remove impurities from raw natural gas, making it suitable for transportation and various end uses. Natural Gas Processing Plants recover valuable NGLs, such as ethane, propane, and butane, which have significant commercial value. These NGLs are used in various industries, including petrochemicals and as feedstocks for plastics and chemicals production. Stricter environmental regulations have led to increased demand for Natural Gas Processing Plants that can remove pollutants and reduce greenhouse gas emissions from natural gas streams. These facilities are vital for ensuring compliance with emissions reduction targets. Natural gas is considered a transitional energy source due to its lower carbon emissions compared to coal and oil. Natural Gas Processing Plants are crucial in making natural gas cleaner and more environmentally friendly, aligning with global efforts to reduce carbon emissions. Natural Gas Processing Plants are integral to liquefied natural gas (LNG) production. LNG facilities process natural gas, cool it to a liquid state, and then transport it to global markets. The demand for LNG is growing, making these processing plants essential for international energy trade.

.Regional Insights

North America

North America was the largest market for midstream oil and gas equipment, accounting for over 40% of the global market in 2022. The region is home to some of the largest oil and gas producers in the world, such as the United States and Canada. The growth of the midstream oil and gas equipment market in North America is being driven by increasing shale oil and gas production, as well as rising investment in midstream infrastructure.

The North American market for midstream oil and gas equipment is dominated by the United States, which accounts for over 90% of the market. The growth of the market in the United States is being driven by increasing shale oil and gas production, as well as rising investment in midstream infrastructure.

Canada is the other major market for midstream oil and gas equipment in North America. The growth of the market in Canada is being driven by the development of new oil and gas fields, as well as the need to replace aging infrastructure.

Europe

Europe was the second-largest market for midstream oil and gas equipment, accounting

for over 25% of the global market in 2022. The region is home to a number of major oil and gas companies, such as BP, Shell, and TotalEnergies. The growth of the midstream oil and gas equipment market in Europe is being driven by the need to replace aging infrastructure, as well as the development of new oil and gas fields.

The European market for midstream oil and gas equipment is dominated by the United Kingdom, Norway, and Russia. The growth of the market in these countries is being driven by the need to replace aging infrastructure, as well as the development of new oil and gas fields.

Other major markets for midstream oil and gas equipment in Europe include the Netherlands, Italy, and Germany. The growth of the market in these countries is being driven by the need to expand midstream infrastructure to meet rising demand for oil and gas.

Asia Pacific

Asia Pacific is the fastest-growing market for midstream oil and gas equipment, with a CAGR of over 10% expected during the forecast period. The region is home to some of the fastest-growing economies in the world, such as China and India, which are driving up demand for oil and gas. The growth of the midstream oil and gas equipment market in Asia Pacific is also being driven by rising investment in midstream infrastructure.

The Asia Pacific market for midstream oil and gas equipment is dominated by China, India, and Indonesia. The growth of the market in these countries is being driven by rising demand for oil and gas, as well as the development of new oil and gas fields.

Other major markets for midstream oil and gas equipment in Asia Pacific include Malaysia, Thailand, and Vietnam. The growth of the market in these countries is being driven by the need to expand midstream infrastructure to meet rising demand for oil and gas.

Key Market Players

Schlumberger Limited

Baker Hughes Company

Halliburton Company

General Electric Company

National Oilwell Varco Inc.

Tenaris S.A.

ABB Ltd.

Flowserve Corporation

Caterpillar Inc.

Emerson Electric Company

Report Scope:

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

Midstream Oil and Gas Equipment Market, By Type:

Pipes

Rail Tank Car

Gas Processing Equipment

Storage Tanks

Pumps

Valves & Compressors

Midstream Oil and Gas Equipment Market, By Application:

Pipelines

Natural Gas Processing Plant

LNG/LPG Facilities

Crude by Rail

Others

Midstream Oil and Gas Equipment Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Midstream Oil and Gas Equipment Market.

Available Customizations:

Global Midstream Oil and Gas Equipment market report with the given market data, Tech Sci 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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