

United States Pipeline & Process Services Market By Asset Type (Pipeline, Process), By Operation (Construction, Maintenance, Engineering & Design, Inspection & Integrity Services, Turnaround Management), By End User (Oil & Gas, Chemical, Power, Water & Wastewater, Others), By Region, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

The United States Pipeline & Process Services Market was valued at USD 1.13 Billion in 2023 and is predicted to experience robust growth in the forecast period with a CAGR of 5.01% through 2029.

The United States Pipeline & Process Services Market is a crucial segment of the energy and industrial sectors, characterized by significant growth and evolving dynamics. This market encompasses a wide range of services, including pipeline maintenance, process services, dewatering, leak detection, cleaning, and more. The market is driven by the need for operational efficiency, safety, and regulatory compliance across the oil and gas, chemical, and water industries.

One of the primary drivers of growth in this market is the ongoing expansion and maintenance of the extensive pipeline network in the United States. The country's vast pipeline infrastructure, which is essential for the transportation of oil, gas, and other industrial fluids, requires regular maintenance and upgrades to ensure safety and efficiency. The aging pipeline infrastructure necessitates continuous investment in inspection, repair, and replacement services, further propelling the demand for pipeline and process services.

Technological advancements are also playing a significant role in shaping the market. The integration of advanced technologies such as the Internet of Things (IoT), artificial intelligence (AI), and automation has revolutionized pipeline monitoring and maintenance processes. These technologies enable real-time monitoring, predictive maintenance, and automated operations, enhancing the reliability and efficiency of pipeline systems. Companies in the market are increasingly adopting these technologies to offer more sophisticated and efficient services, thereby gaining a competitive edge.

Environmental regulations and safety standards are critical factors influencing the market. Stringent regulations aimed at preventing pipeline leaks and ensuring environmental protection have led to increased demand for compliance-related services. Companies are investing in advanced leak detection systems, corrosion protection, and environmental monitoring solutions to meet these regulatory requirements and avoid hefty penalties. This regulatory environment not only drives the demand for specialized services but also fosters innovation in safety and compliance technologies.

Moreover, the market's growth is supported by the steady demand from end-user industries. The oil and gas sector, in particular, remains a major consumer of pipeline and process services, driven by ongoing exploration, production, and transportation activities. Additionally, the chemical and water industries contribute to the demand, requiring specialized services for their pipeline systems.

Key Market Drivers

Increasing Energy Demand

The United States has experienced a surge in energy demand, driven by population growth, industrial expansion, and increased urbanization. This growing demand for energy, particularly in the form of natural gas and oil, has necessitated the expansion and maintenance of pipeline infrastructure. Pipelines are the most efficient and cost-effective method for transporting large volumes of oil and gas over long distances. As a result, the need for robust pipeline and process services has grown significantly. These services ensure the safe, reliable, and efficient operation of pipeline systems, which are critical for meeting the nation's energy needs. The focus on energy security and the need to reduce dependence on imported oil further amplifies the importance of a well-maintained pipeline network, thus driving the demand for pipeline and process services.

Technological Advancements

Advancements in technology have been a major driver for the pipeline and process services market in the United States. Innovations in pipeline inspection, maintenance, and monitoring technologies have enhanced the efficiency and safety of pipeline operations. For instance, the development of smart pigging devices, which are used for inspecting pipelines internally, has revolutionized the way pipeline integrity is assessed. These devices can detect anomalies, corrosion, and other potential issues, allowing for proactive maintenance and reducing the risk of leaks or failures. Additionally, the integration of Internet of Things (IoT) and big data analytics into pipeline operations has enabled real-time monitoring and predictive maintenance, further improving the reliability of pipeline systems. These technological advancements not only enhance operational efficiency but also reduce costs, making pipeline and process services more attractive to energy companies.

Regulatory Compliance and Environmental Concerns

Regulatory compliance and environmental concerns are significant drivers of the pipeline and process services market in the United States. The federal and state governments have implemented stringent regulations to ensure the safety and environmental sustainability of pipeline operations. Agencies such as the Pipeline and Hazardous Materials Safety Administration (PHMSA) and the Environmental Protection Agency (EPA) enforce these regulations, which include requirements for regular inspections, maintenance, and leak detection. Non-compliance can result in severe penalties and legal liabilities, prompting pipeline operators to invest in comprehensive pipeline and process services. Additionally, growing environmental awareness and the push for sustainable practices have led to increased scrutiny of pipeline operations. Companies are under pressure to minimize their environmental footprint and prevent incidents such as oil spills, which can have devastating ecological impacts. As a result, there is a heightened demand for services that ensure regulatory compliance and environmental protection.

Aging Infrastructure

The aging pipeline infrastructure in the United States is another key driver of the pipeline and process services market. Many pipelines in the country were constructed several decades ago and are now approaching or exceeding their intended lifespan. The wear and tear on these pipelines can lead to increased risks of leaks, failures, and accidents. To mitigate these risks and ensure the continued safe operation of

pipeline systems, extensive maintenance, repair, and replacement activities are required. This necessity has driven the demand for specialized pipeline and process services that focus on the assessment, rehabilitation, and modernization of aging infrastructure. By addressing the challenges posed by aging pipelines, these services play a crucial role in maintaining the integrity and reliability of the nation's energy transportation network.

Key Market Challenges

Regulatory Compliance and Environmental Concerns

One of the significant challenges facing the United States Pipeline & Process Services Market is stringent regulatory compliance and environmental concerns. The U.S. pipeline industry is heavily regulated by federal, state, and local authorities, including the Federal Energy Regulatory Commission (FERC), the Environmental Protection Agency (EPA), and the Department of Transportation's Pipeline and Hazardous Materials Safety Administration (PHMSA). These regulatory bodies enforce a complex web of rules and guidelines to ensure the safe operation of pipelines, which often results in significant compliance costs for operators.

Environmental concerns further exacerbate these challenges. The risk of oil spills, gas leaks, and other environmental hazards puts intense pressure on companies to adopt advanced technologies and best practices to mitigate risks. This includes investing in sophisticated monitoring systems, regular maintenance, and emergency response protocols. The push for cleaner energy sources and the transition to renewable energy also pose long-term challenges for the industry. As the demand for fossil fuels diminishes, pipeline operators may face reduced throughput and underutilized infrastructure, leading to financial instability.

Moreover, public opposition and activism against pipeline projects can delay or halt new developments. High-profile incidents, such as the Dakota Access Pipeline protests, highlight the contentious nature of pipeline expansions and the growing influence of environmental groups. Companies must navigate these challenges by engaging in transparent community relations, implementing robust environmental management plans, and maintaining compliance with evolving regulations. The financial and operational burden of adhering to these regulatory and environmental requirements remains a significant challenge for the U.S. Pipeline & Process Services Market.

Aging Infrastructure and Maintenance Costs

The aging infrastructure of the United States pipeline network presents a formidable challenge for the Pipeline & Process Services Market. Many of the pipelines currently in operation were built decades ago, with some dating back to the mid-20th century. As these pipelines age, they become more susceptible to corrosion, leaks, and other forms of degradation, increasing the risk of failures and accidents. Maintaining and upgrading this aging infrastructure requires substantial investment in inspection, repair, and replacement activities.

The high cost of maintenance is a significant concern for pipeline operators. Advanced inspection technologies, such as inline inspection tools (smart pigs) and remote monitoring systems, are necessary to detect and address potential issues before they lead to catastrophic failures. However, these technologies are expensive, and their deployment can be logistically challenging, especially for pipelines located in remote or difficult-to-access areas. Additionally, the need for continuous monitoring and regular maintenance schedules adds to the operational costs.

Budget constraints and the competitive nature of the market can exacerbate these challenges. Pipeline operators must balance the need for rigorous maintenance with cost-effective operations. Deferred maintenance can lead to increased risks of incidents, resulting in potential regulatory fines, environmental cleanup costs, and reputational damage. Therefore, finding a sustainable approach to managing aging infrastructure while controlling costs remains a critical challenge for the U.S. Pipeline & Process Services Market.

Technological Advancements and Cybersecurity Threats

The rapid pace of technological advancements and the growing threat of cybersecurity attacks pose significant challenges for the United States Pipeline & Process Services Market. The industry is increasingly relying on digital technologies, such as the Internet of Things (IoT), artificial intelligence (AI), and big data analytics, to enhance operational efficiency, improve safety, and optimize resource management. While these technologies offer numerous benefits, they also introduce new vulnerabilities and risks.

Moreover, the integration of new technologies often involves significant capital expenditure and the need for specialized skills and training. Operators must invest in upgrading their infrastructure, implementing new systems, and training their workforce to effectively utilize these technologies. The rapid pace of technological change can

als%li%lead t%li%obsolescence, requiring ongoing investments t%li%stay current with the latest advancements. Balancing the benefits of technological innovation with the risks and costs associated with cybersecurity and implementation presents a complex challenge for the U.S. Pipeline & Process Services Market.

Workforce Shortages and Skill Gaps

Workforce shortages and skill gaps represent a critical challenge for the United States Pipeline & Process Services Market. The industry is experiencing a significant demographic shift, with a large portion of the workforce nearing retirement age. This aging workforce, coupled with a lack of younger talent entering the field, creates a pressing need for skilled professionals t%li%fill the gaps. The specialized nature of pipeline operations requires workers with expertise in areas such as welding, pipeline inspection, and maintenance, which are not easily transferable from other industries.

Attracting and retaining qualified personnel is becoming increasingly difficult. The physically demanding and often remote nature of pipeline work can deter potential candidates, while competition from other sectors, such as the renewable energy industry, further exacerbates the talent shortage. Additionally, the industry's reputation for environmental risks and public opposition t%li%pipeline projects can make it less appealing t%li%younger generations seeking stable and socially responsible careers.

Key Market Trends

Integration of Advanced Technologies

The United States Pipeline & Process Services market is witnessing a significant shift with the integration of advanced technologies. Innovations such as the Internet of Things (IoT), Artificial Intelligence (AI), and Machine Learning (ML) are being increasingly adopted t%li%enhance operational efficiency, safety, and reliability. IoT devices and sensors enable real-time monitoring of pipeline conditions, detecting leaks, pressure changes, and other anomalies promptly. AI and ML algorithms are employed t%li%analyze vast amounts of data collected from these sensors, predicting potential issues before they escalate int%li%critical problems. This predictive maintenance approach minimizes downtime and reduces repair costs, ensuring smoother operations. Moreover, digital twin technology, which creates a virtual replica of physical assets, allows for the simulation of different scenarios, aiding in better decision-making and optimizing performance. Companies are als%li%leveraging blockchain technology t%li%enhance transparency and security in pipeline operations. Blockchain provides a

decentralized and immutable ledger that can track the entire lifecycle of a pipeline project, from construction to maintenance, ensuring accountability and reducing the risk of fraud. As these technologies continue to evolve, their adoption is expected to increase, driving the market towards greater automation, efficiency, and safety.

Focus on Environmental Sustainability

Environmental sustainability is becoming a pivotal trend in the United States Pipeline & Process Services market. With increasing regulatory pressures and growing awareness about environmental impacts, companies are prioritizing eco-friendly practices. This shift is evident in the adoption of green technologies and practices aimed at reducing carbon footprints and minimizing environmental damage. The industry is investing in advanced leak detection systems and pipeline integrity management to prevent spills and leaks that can lead to environmental disasters. Furthermore, there is a growing emphasis on the use of renewable energy sources to power pipeline operations. Solar panels, wind turbines, and other renewable energy technologies are being integrated into pipeline infrastructure to reduce reliance on fossil fuels. Companies are also exploring the use of biodegradable materials and eco-friendly coatings to reduce the environmental impact of pipeline construction and maintenance. Additionally, initiatives to rehabilitate and restore ecosystems affected by pipeline activities are gaining traction. These efforts not only mitigate environmental damage but also enhance the social license to operate, as stakeholders increasingly demand responsible and sustainable practices. As environmental regulations become more stringent, the focus on sustainability is expected to intensify, driving innovations and investments in green technologies and practices.

Expansion of Natural Gas Infrastructure

The expansion of natural gas infrastructure is a prominent trend shaping the United States Pipeline & Process Services market. Driven by the growing demand for cleaner energy sources, natural gas is increasingly becoming a preferred choice for power generation, industrial applications, and residential use. This surge in demand is prompting significant investments in the development and expansion of natural gas pipelines. The construction of new pipelines and the upgrade of existing infrastructure are aimed at enhancing the capacity and reliability of natural gas supply chains. Additionally, the shift towards liquefied natural gas (LNG) is driving the need for specialized infrastructure, including LNG terminals and storage facilities. The United States, with its abundant natural gas reserves, is positioning itself as a major player in the global LNG market, leading to increased exports and the construction of export

terminals. This expansion not only supports domestic energy needs but also strengthens the country's position in the international energy landscape. Moreover, the development of natural gas infrastructure is accompanied by advancements in technology and safety measures, ensuring efficient and secure operations. As the demand for natural gas continues to rise, the expansion of its infrastructure will remain a key driver of growth in the pipeline and process services market.

Increasing Investment in Pipeline Safety and Integrity

Pipeline safety and integrity are critical concerns in the United States Pipeline & Process Services market, driving substantial investments in this area. The catastrophic consequences of pipeline failures, including environmental damage, financial losses, and public safety risks, underscore the importance of maintaining robust pipeline integrity. Companies are investing heavily in advanced inspection and maintenance technologies to ensure the safety and reliability of their pipeline networks. Non-destructive testing (NDT) methods, such as ultrasonic testing, magnetic flux leakage, and smart pigging, are being employed to detect and assess potential defects and anomalies in pipelines. These technologies provide detailed insights into the condition of pipelines, enabling timely maintenance and repairs. Additionally, the use of real-time monitoring systems, equipped with sensors and IoT devices, allows for continuous surveillance of pipeline operations, detecting issues such as corrosion, pressure fluctuations, and leaks. Regulatory bodies are also imposing stricter safety standards and compliance requirements, compelling companies to invest in state-of-the-art technologies and best practices. Furthermore, the adoption of risk-based integrity management programs is gaining momentum, focusing on proactive measures to prevent pipeline failures. As the industry prioritizes safety and integrity, investments in advanced technologies and practices will continue to grow, ensuring the long-term reliability of pipeline infrastructure.

Rise of Digital Transformation in Pipeline Operations

Digital transformation is revolutionizing the United States Pipeline & Process Services market, driving significant changes in how pipeline operations are managed and optimized. The adoption of digital technologies, including cloud computing, big data analytics, and artificial intelligence, is enabling companies to streamline their operations, enhance decision-making, and improve overall efficiency. Cloud-based platforms provide centralized access to data and applications, facilitating seamless collaboration and information sharing across different departments and locations. Big

data analytics allows for the analysis of vast amounts of data generated from pipeline operations, uncovering patterns and insights that can inform strategic decisions. AI-powered algorithms are being used to optimize various aspects of pipeline operations, from route planning and logistics to predictive maintenance and risk management. Additionally, the integration of digital twin technology is transforming pipeline management by creating virtual replicas of physical assets. These digital twins enable real-time monitoring, simulation, and analysis, allowing companies to optimize performance, predict failures, and implement preventive measures. The rise of digital transformation is also fostering greater transparency and accountability, with blockchain technology being used to secure and verify data across the pipeline lifecycle. As the industry continues to embrace digitalization, the adoption of advanced technologies will drive operational excellence and competitiveness in the pipeline and process services market.

Segmental Insights

Operation Insights

Construction segment dominated in the United States Pipeline & Process Services market in 2023. The U.S. is investing heavily in expanding and modernizing its pipeline infrastructure to meet the growing demand for energy. This includes the construction of new pipelines to transport oil, natural gas, and refined products across the country. Additionally, existing pipelines are being upgraded to enhance capacity, safety, and efficiency. This surge in construction activity is driven by the need to support the energy sector's growth and ensure reliable energy supply. The United States has seen a significant increase in energy production, particularly from shale gas and oil. The rise in domestic production necessitates the development of new pipeline networks to transport these resources from production sites to refineries, processing plants, and export terminals. The construction segment benefits directly from this increased production, as new pipelines are essential to handle the growing volumes of energy resources.

Stringent regulatory requirements and safety standards are prompting companies to invest in new pipeline construction and the replacement of aging infrastructure. Regulatory bodies such as the Pipeline and Hazardous Materials Safety Administration (PHMSA) enforce strict guidelines to ensure the integrity and safety of pipelines. Compliance with these regulations often requires the construction of new pipelines and the upgrading of existing ones to meet modern safety standards. Economic growth and the shift towards cleaner energy sources, such as natural gas, are driving the

demand for new pipeline construction. Natural gas is viewed as a more environmentally friendly alternative to coal and oil, leading to increased investments in natural gas pipelines. Additionally, economic incentives and government policies supporting infrastructure development further fuel the construction segment's growth.

Advancements in construction technologies and techniques are enhancing the efficiency and cost-effectiveness of pipeline construction projects. Innovations such as automated welding, trenchless technology, and advanced surveying methods reduce construction time and costs while improving the quality and safety of pipeline installations. These technological advancements make pipeline construction more attractive and feasible for companies, contributing to the segment's dominance. Several large-scale strategic projects and investments are driving the growth of the construction segment. High-profile projects such as interstate pipelines, cross-border pipelines, and major refurbishment initiatives are undertaken to secure energy supply and enhance the nation's energy infrastructure. These projects often involve substantial financial investments and extensive construction efforts, reinforcing the construction segment's leading position in the market. The increasing market demand for reliable and efficient energy infrastructure is a significant factor in the dominance of the construction segment. As the U.S. economy grows and industrial activities expand, the need for robust and extensive pipeline networks becomes more critical. Construction projects are essential to meet this demand, ensuring the timely and efficient delivery of energy resources to various sectors.

Regional Insights

Northeast dominated the United States Pipeline & Process Services market in 2023. The Marcellus and Utica shale formations, located primarily in the Northeast, are among the most prolific natural gas-producing regions in the United States. The abundance of natural gas in these formations has driven significant investments in pipeline infrastructure to transport the gas to markets across the country and for export. The high level of activity in drilling and production necessitates extensive pipeline networks to manage the transportation of natural gas, thereby driving demand for pipeline services in the region. The Northeast is one of the most densely populated regions in the United States, with significant urban and industrial centers such as New York City, Boston, and Philadelphia. This high population density and industrial activity result in substantial energy consumption, requiring a robust and reliable pipeline infrastructure to ensure adequate supply. The region's energy needs encompass residential heating, electricity generation, and industrial use, all of which rely heavily on natural gas and oil delivered through pipelines.

Aging pipeline infrastructure in the Northeast requires extensive upgrades and modernization to meet current safety standards and accommodate increased capacity. Many of the existing pipelines in the region were constructed decades ago and need replacement or significant rehabilitation to prevent leaks, improve efficiency, and comply with regulatory requirements. These infrastructure projects drive demand for pipeline and process services, contributing to the market's growth in the Northeast. The Northeast faces stringent regulatory and environmental pressures to reduce greenhouse gas emissions and transition to cleaner energy sources. States in the region, such as New York and Massachusetts, have implemented ambitious climate goals, including the reduction of carbon emissions and the promotion of renewable energy. These regulatory frameworks necessitate the construction of new pipelines for natural gas, which is considered a cleaner alternative to coal and oil, as well as the development of infrastructure for renewable energy integration.

The Northeast's strategic location provides access to major export markets for liquefied natural gas (LNG). Ports in the region, such as those in New Jersey and Maryland, serve as critical hubs for LNG exports to Europe and other international markets. The demand for LNG exports drives the construction of pipelines to transport natural gas from production sites to liquefaction facilities and export terminals, bolstering the region's dominance in the pipeline and process services market. Economic growth in the Northeast, coupled with investments in energy infrastructure, supports the dominance of the pipeline and process services market. Economic development initiatives and government incentives for infrastructure projects attract investments from both public and private sectors. These investments are channeled into the construction, maintenance, and upgrading of pipeline networks, further enhancing the region's market position.

The Northeast region is at the forefront of adopting advanced technologies and innovative solutions in pipeline and process services. Companies in the region are leveraging cutting-edge technologies such as smart sensors, IoT, and advanced monitoring systems to enhance pipeline safety, efficiency, and reliability. The focus on technological advancements drives demand for specialized services and expertise, contributing to the market's growth and dominance in the Northeast. The Northeast is actively engaged in energy transition initiatives aimed at reducing dependency on fossil fuels and promoting renewable energy sources. These initiatives include the development of infrastructure for renewable natural gas (RNG) and hydrogen, which require new pipeline networks and retrofitting of existing ones. The shift towards cleaner energy sources creates new opportunities and demand for pipeline and process

services in the region.

Key Market Players

Baker Hughes Company

Halliburton Energy Services, Inc.

Altus Intervention

Blue Fin Group

Fortis Inc.

ENERMECH UK Limited

Enerpac Tool Group Corp

IKM Gruppen AS

Ideh Pouyan Energy Co

Techfem Spa

Trans Asia Pipeline Services FZC

Report Scope:

In this report, the United States Pipeline & Process Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Pipeline & Process Services Market, By Asset Type:

Pipeline

Process

United States Pipeline & Process Services Market, By Operation:

Construction

Maintenance

Engineering & Design

Inspection & Integrity Services

Turnaround Management

United States Pipeline & Process Services Market, By End User:

Oil & Gas

Chemical

Power

Water & Wastewater

Others

United States Pipeline & Process Services Market, By Region:

Northeast

Southwest

West

Southeast

Midwest

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Pipeline & Process Services Market.

Available Customizations:

United States Pipeline & Process 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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