

Report Information

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Welded Pipes Market Research Report—Global Forecast till 2030

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Description:

Welded Pipes Market Overview

Welded pipes market is projected to be worth USD 355.69 Billion by 2030, registering a CAGR of 5.2% during the forecast period (2022 - 2030). The market was valued at USD 225.15 billion in 2021. These pipes use metal and alloy-based materials for fabricating purposes. The welded pipes have several unique features. They are pipes that can resist high temperature, corrosion, cracking and high strength. These are welded pipes that are available in stainless steel and other sturdy materials. Shaping material through the welded pipes is possible. The demand for welded pipes is growing due to various industries. The sales and revenue of the market are expected to be massive in the forecast period.

Further, the growing application of these pipes in the automotive, marine and medical industries is growing. The steady growth in the market revenue is due to the demand in the construction industry. There is the use of carbon, magnese and molybdenum is used for welding purposes. The crucial demand driving factor of the market is the need for structural and functional requirements of industries.

Further, the growth of commercial and residential buildings is creating more need for such welding pipes. The new instructions in emerging economies will create more opportunities in the market. The intense architectural application will enhance the adoption rate. All these are factors that are expected to raise the overall value of this market in the forecast period.

Welded Pipes Market Dynamics Drivers

- ## Growing Construction Industry

Governments across the world are focused on promoting and developing their infrastructure. They are introducing various reforms and regulations to strengthen their infrastructure and real estate. Such reforms are expected to support the growth of the construction industry in the region and, consequently, drive the welded pipes market. This is because welded pipes are used extensively while constructing structures due to their performance of durability, strength, and resistance to extreme environmental conditions. According to the International Construction Survey 2019, which brings together data and experience from 64 markets around the world, construction costs have risen steadily across markets in Europe and North America, and the demand is still on the higher side, which encourages further construction growth.

- ## Rise In Demand For Welded Pipes In Industries

Restraints

- ## Fluctuating Raw Material Prices

It is challenging to monitor the prices of raw materials, as the prices fluctuate with irregularity and without any discernible pattern. The companies engaged in manufacturing welded pipes cannot judge the risk of strong fluctuating raw material costs. The increase in the prices of raw materials, which are required for manufacturing welded pipes, will increase the price of the final products. Steel is the primary raw material used for manufacturing welded pipes. The price of steel in the international market has been fluctuating due to market conditions, international steel prices, and other inputs. The raw material availability depends on global and local demand and government regulations. The fluctuating prices of raw materials, such as iron and steel, which is used to manufacture welded pipes, affect the production cost. Thus, fluctuating raw material prices are expected to restrict the growth of the global welded pipes market during the forecast period.

Opportunity

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Development Of Infrastructure For New Oil And Gas Reserves

Oil and Gas companies are always searching for new reserves of oil and gas across the globe. In November 2019, Iran discovered oil reserves accounting for about 50 million barrels. Abu Dhabi also discovered new oil fields with over 7 million barrels. The most surprising discovery was that of ExxonMobil off the coast of Guyana, where the oil field is expected to contain around 5 million barrels of oil.

With the discovery of oil, essential infrastructure such as pipelines needs to be set up for extraction and transport. This prompts oil and gas companies to collaborate and partner with pipe manufacturers. Thus, the development of infrastructure for new oil and gas reserves is expected to create an opportunity for the players in the global welded pipes market during the forecast period.

Welded Pipes Market Segment Overview: By Material

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Carbon Steel

Carbon steel is a type of alloy steel that is extensively used in piping systems in end-use industries. It is manufactured by rolling, forging, and drawing methods. Iron is the major element in carbon steel along with other elements in an appropriate amount. Based on the percentage of carbon present, the carbon steel segment is sub-segmented into low carbon steel, medium carbon steel, and high carbon steel. Various advantages associated with carbon steel are safety, durability, corrosion resistance, cost-effectiveness, and high tensile strength. Such factors raise the demand for carbon steel welded pipes in the global welded pipes market during the forecast period.

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Stainless Steel

Stainless steel is the most widely used material in process industries, after carbon steel, due to its properties, such as corrosion resistance and ductility. For welded stainless-steel pipes, specific alloys are melted according to certain specifications, depending on the grade and application. The basic strip of stainless steel, from which the tubes and pipes are to be formed, is either a hot or cold formed coil. Various types of stainless used for manufacturing are austenitic stainless steel, ferritic stainless steel, martensitic stainless steel, precipitation hardened stainless steel, and duplex/super duplex stainless steel.

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Alloy Steel

Alloy steel is a type of steel that contains small amounts of one or more alloying elements, such as chromium, manganese, silicon, nickel, titanium, copper, and aluminum. The alloy steel segment is sub-segmented into low alloy steels and high alloy steels. Low alloy steel has less than 5% of total alloying elements, while the high alloy steel has greater than 5% of total alloying elements. Various industries prefer alloy steel due to its economic cost, easy availability, ease of processing, and good mechanical properties.

By Product Type

- **Process Pipes**

Process pipes are installed in various processing industries, such as petroleum refineries, chemical, pharmaceutical, textile, paper, semiconductor, cryogenic plants, and other related processing plants and terminals. Within industries, such as chemical and oil & gas, these welded pipes are used to transport liquids and gases. These pipes are used for processing convert liquids, chemicals, fuels, gases, or other raw materials into a usable product.

- **Mechanical Tubes**

Mechanical tubes are used in machines or in the mechanical component parts of industrial, automotive, farm machinery, aircraft, transportation, materials handling, and household equipment. These tubes are produced based on the required diameter and wall thickness dimensions. Mechanical tubes are manufactured with high airtightness, internal cleanliness, and smooth and even internal and outer surfaces. Generally, they have square, rectangle, and round opening but can be customized depending on the application.

- **Heat Exchanger Tubes**

There are generally two types of heat exchangers, which are plate and shell & tube heat exchangers. Shell & tube heat exchangers feature steel tubes inside a carbon steel shell that are ideal for applications with extremely high flow rates, temperatures, and pressure loads. These are used for cooling, heating or re-heating of fluids or gases in a range of applications, such as chemical processing, food processing, pharmaceutical, oil refining, nuclear power generation, refrigeration, and aerospace. These tubes are ideally suited for high temperature and pressure applications.

- **Structural Tubes**

Structural tubes are used in various construction and mechanical applications, such as the construction of buildings, stadiums, and bridges, shipbuilding, offshore platforms, structural applications in the oil & gas industry, and foundation structures in the offshore wind industry. These tubes are available in a range of grades and sizes, depending on the requirement and application. Some of the common applications include sign poles, bollards, piling, columns, and structural supports. These tubes are available with square, rectangle, round in openings depending on the requirement.

- **Hydraulic & Instrumentation Tubes**

Hydraulic & instrumentation tubes are essential components in hydraulic and instrumentation systems to protect and support other components, devices or instruments. These tubes ensure safe and trouble-free operations in oil and gas plants, petrochemical processing, power generation, and other critical industrial applications. For instance, in the aerospace industry, hydraulic tubes are deployed in the engines and airframes of commercial and military aircraft. These tubes are used to actuate flight control surfaces, such as flaps and slats and are also crucial components in landing gear and brakes.

By Application

- **Oil & Gas**

Pipelines in the oil & gas industry are used to deliver oil or gas from the source to processing plants or storage tanks connected to individual wells in the ground. In the oil & gas industry, the material or process type of these pipelines vary according to factors, such as transportation, delivery stage, and upstream, midstream, or downstream operations. As the technologies used in the oil & gas industry advances, the demand for corrosive resistant pipes is expected to increase.

- **Power Generation**

Power generation requires solutions that improve plant efficiency and reduce emissions in compliance with international regulations. These targets are achieved by improving the technologies and materials used in power stations, which are increasingly subjected to high operating stress and temperatures. This area of application requires tubes that satisfy stringent quality requirements of the power generation industry, such as ultra-high creep resistance, increased high-temperature oxidation resistance, high thermal fatigue resistance, and optimum microstructural stability. In power generation, welded tubes and pipes are used as boiler tubes and pipes that operate at very high pressures and temperatures for long periods of time.

- **Infrastructure & Construction**

Welded steel pipes are among one of the oldest building materials used to construct structures due to their performance of durability, strength, and resistance to extreme environmental conditions. Such pipes are used in various applications, such as roofing, structural applications, handrails and balustrade, architectural cladding, and drainage components depending on their size, grade, and shape.

- **Automotive**

In the automotive industry, welded pipes are used as exhaust pipes, which are essential components in the exhaust systems of a vehicle. These pipes ensure continuous operation and are placed between the motor and the catalyzer, which are free of spatter and oxide to prevent particles from breaking off and damaging the catalytic converter.

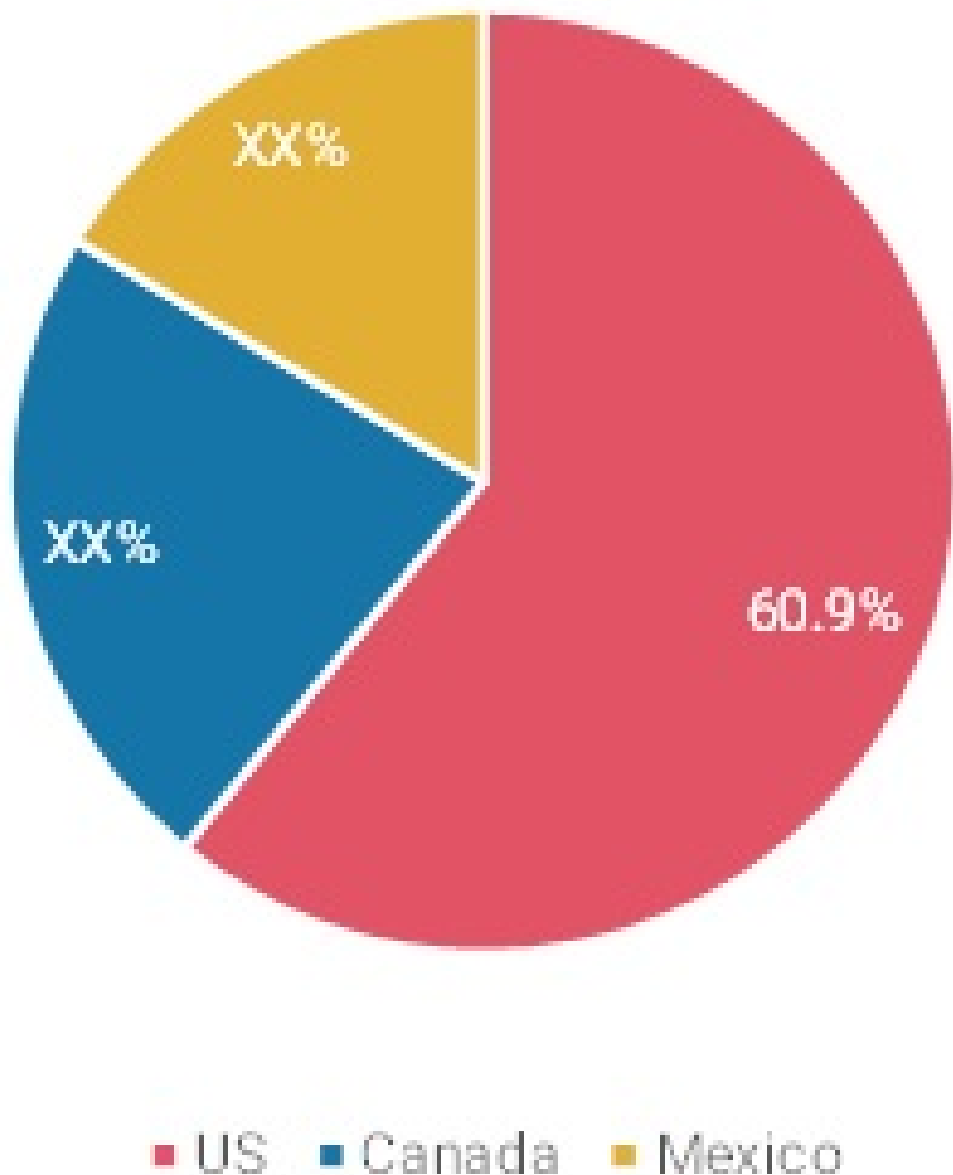
- **Mechanical & Engineering**

The mechanical & engineering segment of welded pipes market includes various industries, such as food & beverage, pharmaceutical, manufacturing, chemical, and other processing industries. The food & beverage industry requires hygienic piping that is placed to connect tanks and vessels together. Welded pipes are used for the flow of various liquids, gases, and other materials to make a finished product. They are also used for heating and cooling purposes in the process.

Welded Pipes Market Regional Analysis

The global welded pipes market has been segmented, on the basis of region, into North America, Europe, Asia-Pacific, Middle East & Africa, and South America.

Figure: North America Welded Pipes Market, by Country, 2018 (% Share)



North America

The region has witnessed significant growth in the construction sector owing to the increasing investments in real estate by construction companies. The construction activities of commercial buildings such as complexes and offices are increasing as the business hubs are becoming overpopulated, creating demand for new complexes. The data of the International Organization of Motor Vehicle Manufacturers, in 2017, shows the total motor vehicle production in the region, in which, the US was the highest vehicle producer, while Mexico showed a significant vehicle production with a 13% growth rate compared to 2016. Additionally, the US is the largest producer of nuclear power and accounted for approximately 30% of the global share.

Europe

Europe holds the second-largest share in the overall welded pipes market. Increasing reconstruction of the existing infrastructure, rising environmental concerns, and shifting preference toward cost-effective construction are factors driving the growth of the welded pipes market in Europe. Moreover, unconventional oil and gas exploration activities such as the production of natural gas from shale formations is driving the market in the region. The region has witnessed significant growth in the construction industry, specifically visible in North-Western Europe that comprises countries including the UK, France, Denmark, the Netherlands, and Belgium among others.

Competitive Landscape

The global welded pipes market is characterized by the presence of many global, regional, and local vendors. The market is highly competitive with all the players competing to gain market share. Intense competition, volatile raw material costs, and frequent changes in government policies are the key factors that limit market growth. The vendors compete on product quality and after sales services offered. It is crucial for the vendors to meet the specific needs of the customer in order to survive and succeed in an intensely competitive market environment.

Welded Pipes Market Key Players

The prominent players in the global welded pipes market are Arcelormittal (US), Evraz Plc (Russia), Napsteel (US), Sandvik AB (Europe), US Steel Tubular Products (US), Associated Pipeline Contractors Inc (US), Foshan Zhongde Stainless Steel Co., Ltd (Russia), Benteler International AG (Europe), Samuel Associated Tube Group (Europe), and Marmon Keystone Canada, Inc (US) among others.

Welded Pipes Market Recent Developments 2021

The key players in North America are witnessing demand from the automotive and construction industry. Export vehicles, domestic sales and the auto industry are raising their investments in the market. The key players are introducing effective welded pipes due to these reasons.

2020

The key players in Germany are witnessing surging growth. The demand for aerospace and the automotive market is higher. Germany has more than 10 steel producing companies that are increasing production by 39.7 million tons. Due to the rising production, the sales of the market are growing immensely.

Welded Pipes Market Report Overview

The welded pipes market study covers the existing short-term and long-term market effects, helping decision-makers draft short-term and long-term plans for businesses by region. The report covers major regions in North America, Europe, Asia-Pacific, Middle East & Africa, and South America. The report analyzes market drivers, restraints, opportunities, challenges, Porter's Five Forces, and supply chain analysis.

Market Segmentation

Global Welded Pipes Market, by Material

- Carbon Steel
- Stainless Steel
- Alloy Steel

Global Welded Pipes Market, by Product Type

- Process Pipes
- Mechanical Tubes
- Heat Exchanger Tubes
- Structural Tubes
- Hydraulic & Instrumentation Tubes

Global Welded Pipes Market, by Application

- Oil & Gas
- Power Generation
- Infrastructure & Construction
- Automotive
- Mechanical & Engineering

Global Welded Pipes Market, by Region

- North America
 - US
 - Canada
 - Mexico
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Rest of Europe
- Asia-Pacific
 - Japan
 - China
 - India
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East & Africa

- South America

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FIGURE 20 GLOBAL WELDED PIPES MARKET, BY REGION, 2018 (% SHARE)
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