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World Oil & Gas Pipe

Industry Study with Forecasts for **2017 & 2022**

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OVERVIEW

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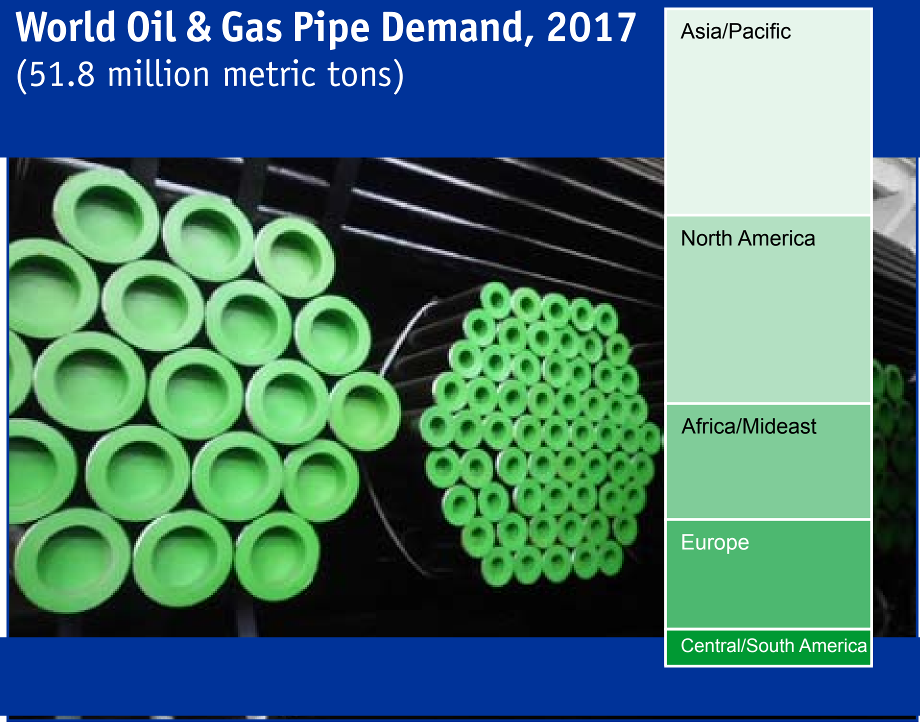
INDUSTRY STRUCTURE

As high oil prices and increasing demand for energy spur new development, increased oil and gas production will require additional investment in pipeline infrastructure.

World demand to rise 5.3% annually through 2017

World demand for oil and gas pipe is expected to increase 5.3 percent per year, reaching 51.8 million metric tons in 2017 as high oil prices and increasing demand for energy spur new development. Increased oil and gas production will require additional investment in pipeline infrastructure. Demand for gas pipe will strongly outpace that for oil pipe, due in large part to infrastructure development. New pipelines will range from domestic lines to transnational systems that deliver natural gas to markets such as Europe.

World Oil & Gas Pipe Demand, 2017
(51.8 million metric tons)



OCTG applications to offer best growth opportunities

Demand gains for oil country tubular goods (OCTG) will outpace growth in the number of drilling rigs through the forecast period, due in part to the fact that rigs are becoming more efficient and are being used to drill more wells per year. In addition, rising OCTG pipe demand will result from increased offshore activity, deeper wells, and growing use of horizontal drilling techniques -- all of which require more pipe than traditional onshore wells. Higher pressure drilling techniques require increased pipe wall thicknesses, which will increase the tonnage of OCTG pipe. Seamless steel pipe will remain the dominant product in these harsh environments. Development of needed improved premium connections will benefit the OCTG market.

Demand for line pipe will benefit from construction of new transmission lines needed to transport oil and gas from drilling sites to customers, and the need for gathering systems at new drilling sites. Plastic pipe demand will grow as it gains share from steel in gathering applications. However, steel pipe will remain the dominant line pipe material because of its high pressure resistance. Seamless pipe has outpaced welded pipe in recent years, reflecting strong growth for OCTG since those applications more frequently require the strength of seamless pipe. Due to its lower price, welded pipe will continue to be preferred in applications where operating conditions allow its use. Demand for distribution pipe will benefit from rising residential construction expenditures, which will boost the need for natural gas lines to new homes.

Steel pipe to remain dominant product

Steel is by far the dominant oil and gas pipe material. Welded pipe, particularly electric resistance welded (ERW) and longitudinal submerged arc welded (LSAW), will narrowly retain the largest portion of steel pipe demand through 2017. Plastic pipe will continue to see a rising share of smaller diameter applications such as gathering pipe, but will account for less than 10 percent of the market through 2017 and beyond.

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Sample Text, Table & Chart

TABLE VII-5

**ALGERIA:
OIL & GAS PIPE DEMAND BY MARKET**

Item	2002	2007	2012	2017	2022
Population (million persons)					
GDP/capita					
Gross Domestic Product (bil 2011$)					
000 Btu oil & gas/$ GDP					
Oil & Gas Production (quadrillion Btu)					
Crude Oil Production (mil bbl)					
Dry Natural Gas Production (tril cu ft)					
Active Rotary Rigs					
Wells Drilled					
m tons oil & gas pipe/tril Btu oil & ga					
Oil & Gas Pipe Demand (000 metric ton					
Oil					
Gas					100

SAMPLE TABLE

AFRICA/MIDEAST

Algeria: Oil & Gas Outlook -- With nearly 685 m
of field production in 2012, Algeria is the third largest oil
Africa after Nigeria and Angola. After reaching a high po
production levels have declined somewhat in the years sir
production is expected to a ... lly to
lion barrels in 2017. Muc ... wil
rising production in the El ... run
Eni, Burlington, and the A ... y So
Much of Algeria remains u ... eser
government's increasing e ... uce
strong oilfield activity thro ... oreig
generally invest in the country through joint ventures that
majority ownership. Algerian crude is very high quality, l
and low sulfur, making it especially attractive to refiners.
domestic oil market is fairly small, much of the nation's o
ported. About 80 percent of oil exports go to North Amer
with the United States a leading destination.

SAMPLE TEXT

Algeria is home to extensive natural gas reserves. The country is one of the world's leading exporters of natural gas, and is Africa's largest exporter by a wide margin. In 2012, 2.88 trillion cubic feet of dry gas were produced. The Hassi R'Mel field in eastern Algeria is the largest gas field. A significant share of withdrawn gas is reinjected to enhance oil recovery. Future production is expected to expand considerably, aided by the development of new projects in the southwestern portion of the country. Eni, Total, and Repsol are among the firms involved in these projects. The country is also believed to possess sizable shal
sources, but the government has stated that it views shale ga
ment as a long term project, with full production deferred un

The Algerian government has also been working to mak
gas sectors more attractive to foreign participants. In March

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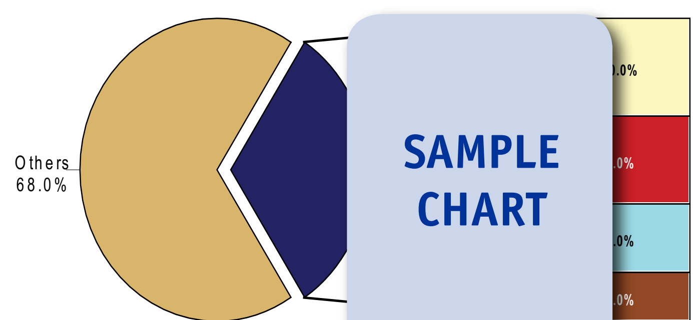
CHART IX-1

**WORLD OIL & GAS PIPE MARKET SHARE, 2012
($56.5 billion)**



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Sample Profile, Table & Forecast

TABLE VII-6

**ALGERIA:
OIL & GAS PIPE DEMAND BY APPLICATION & PRODUCT
(thousand metric tons)**

Item	2002	2007	2012	2017	2022
Oil & Gas Pipe Demand					
By Application:					
OCTG					
Line Pipe					
Distribution					
By Product:					
Steel					
Welded					
Seamless					
Fittings					
Plastic & Other					

SAMPLE TABLE

COMPANY PROFILES

Jiangsu Yulong Steel Pipe Company Limited
No. 15 Yulong Road
Yuqi Town, Huishan Area
Wuxi, Jia
China
86-510-8
http://wv

Sales: $
Employ

SAMPLE PROFILE

Key Proc ..., spiral submerged arc welded, and electric resistance welded steel pipe

Jiangsu Yulong Steel Pipe is a manufacturer of steel pipe for the oil and gas, water, sewage, petrochemical, and other industries. The Company markets its products worldwide.

The Company is involved in the world oil and gas pipe industry through the manufacture of steel pipe, including longitudinal submerged arc welded (LSAW), spiral submerged arc welded (SSAW), and electric resistance welded (ERW) types. LSAW, SSAW, and ERW steel pipe from Jiangsu Yulong Steel Pipe are all suitable for use in the transmission of oil and gas, among other applications. The Company's LSAW pipe is made in diameters ranging from 406 to 1,422 millimeters (mm). SSAW steel pipe is available in diameters up to 2,850 mm and wall thicknesses of 25 mm. Jiangsu Yulong Steel Pipe makes ERW pipe in diameters ranging from 21 to 508 mm.

Manufacturing operations are conducted by the Company at a site in Wuxi, China. The Wuxi plant has annual capacities of 200,000 metric tons of LSAW pipe and 260,000 metric tons of SSAW pipe. Jiangsu

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"Increases in drilling and continuing efforts to develop the country's as yet underdeveloped oil and gas reserves will support growth in pipe demand. Despite the large potential for new developments, Algeria has emphasized the maintenance of production from its existing producing areas, such as projects in new areas of the large Hassi Messaoud field. Algeria is looking to begin an offshore oil and gas program, which would also boost demand for OCTG pipe."
--Section VII, pg. 172-3

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Other Studies

Shale Oil & Gas: Products & Services

This study analyzes the US shale oil and gas product and service industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., tubular goods, downhole tools, drill bits and reamers, stimulation products, drilling fluids), service (e.g., pressure pumping, drilling, completion and production), region and play (e.g., Haynesville, Marcellus). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3112 .... December 2013 .... $5200

World Well Stimulation Materials

This study analyzes the world well stimulation material industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by type (e.g., proppants, chemicals), country (US, Russia, China, Canada) and world region (Latin America, Europe, Asia/Pacific, Africa/Mideast). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3080 .... November 2013 .... $6300

World Water Pipe

Global demand for water pipe is forecast to increase 7.5 percent per year through 2017 to 10.9 billion meters. China alone will account for one-third of the increase, with other industrializing countries in Asia -- such as India and Indonesia -- and in the Africa/Mideast region also driving demand. Plastic pipe will be the fastest growing type. This study analyzes the 7.6 billion meter world water pipe industry, with forecasts for 2017 and 2022 by market, product, world region, and for 22 major countries. The study also evaluates company market share and profiles industry participants.

#3004 .... April 2013 .... $6100

Large Diameter Pipe

US large diameter pipe demand will rise 6.2 percent yearly through 2016 to 197 million feet. Storm and sanitary sewers will remain the leading market, while drainage and water transmission will grow the fastest. Concrete pipe will rebound from a depressed base to be the fastest growing material, while HDPE will surpass steel as the most common type. This study analyzes the 146 million foot US large diameter pipe industry, with forecasts for 2016 and 2021 by market and material. The study also evaluates company market share and profiles industry players.

#2974 .... December 2012 .... $5100

Oil & Gas Infrastructure

US demand for oil and gas infrastructure equipment will rise 6.3 percent yearly through 2016 to $12.1 billion. The key pipe segment will benefit from construction of new transmission lines and the need for gathering systems at new drilling sites. Compressors will be the fastest growing type, while the Eastern US leads gains by region. This study analyzes the $8.9 billion US oil and gas infrastructure equipment industry, with forecasts for 2016 and 2021 by product, application and US region. The study also evaluates company market share and profiles industry players.

#2922 .... November 2012 .... $5100

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