

World Steel Pipe

Industry Study with Forecasts for 2019 & 2024

Study #3362 | February 2016 | \$6200



Worldwide demand growth for steel pipe will be paced by continued strong increases in developing markets through 2019. The pace of gains will decelerate from that of the 2009-2014 period as construction activity slows in China and other developing countries, and as oil and gas exploration moderates in North America after a period of rapid growth. Steel will remain the dominant pipe material in energy applications, but in other markets it will face greater competition from plastic and other materials that offer cost or performance advantages.

Growth in large Chinese market to remain above global average

China, by far the world's largest national market in 2014, was a primary driver of growth in steel pipe demand between 2004 and 2014. Expansion across all steel pipe markets, especially in structural, mechanical, OEM, and construction applications, fueled world steel pipe demand. Through the forecast period, advances in steel pipe demand in China are projected to decelerate significantly, though growth will remain above the global average. In contrast to slowing growth in the Chinese market, demand for steel pipe in several other countries in Asia is projected to accelerate through 2019. India will see strong improvement in growth, driven by an acceleration in construction spending and expansion in its manufacturing sector.

The North American market contracted between 2004 and 2009 due to economic recession, but saw robust 2009-2014 growth, driven by a boom in demand for pipe for oil and gas production. Through 2019, demand in North America is projected to decelerate significantly, due to a slowdown in investment in the energy sector.

Oil & gas leading steel pipe market

The oil and gas market is the leading application for steel pipe, accounting for over half of demand in 2014. Steel makes up the vast majority of pipe utilized in oil and gas transportation and especially production due to its high strength and its pressure and thermal resistance. Demand for oil and gas pipe saw healthy advances between 2009 and 2014, driven by growth in China and North America; however, advances are expected to decelerate through 2019 because of slowing exploration and drilling based on already high production levels and lower oil prices.

Other markets to see demand gains

Steel pipe used in equipment manufacturing is expected to see above average growth through 2019. Structural steel will also register growth above the global average. Although slowing growth in the oil and gas market will limit advances, increases in construction spending will drive demand. Steel pipe also sees significant use in the construction market. Construction demand for steel pipe will see an acceleration through 2019 due to rebounding demand in developed regions.

Study coverage

This study analyzes world demand for steel pipe. It offers historical demand data (2004, 2009 and 2014) plus forecasts (2019 and 2024) for total demand as well as demand by market (oil and gas, structural, mechanical and OEM, construction, industrial processing and other), for six regions and 20 countries. The study also considers market environment factors, evaluates company market share and profiles 25 global players.

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WESTERN EUROPE

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Demand for steel pipe in Spain totaled 450,000 metric tons in 2014, a 1 percent increase from 445,000 metric tons in 2013. Through 2019, demand is expected to remain stable in volume terms as the steel pipe market continues to grow at the base year.

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ARGENTINA: MACROECONOMIC INDICATORS & STEEL PIPE DEMAND

Item	2004	2009	2014	2019	2024
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2013\$)					
Oil & Gas Production (quadrillion Btu)					
Construction Expenditures (bil 2013\$)					
Manufacturing Value Added (bil 2013\$)					
\$ oil & gas pipe/bil Btu oil & gas prdn					
\$ construction pipe/000\$ construction					
\$ other pipe/000\$ MVA					
Steel Pipe Demand (mil \$)					
Oil & Gas					
Structural, Mechanical, & OEM					
Construction					
Industrial Processing & Other					

Source: The Freedonia Group

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INDONESIA: STEEL PIPE DEMAND BY MARKET (thousand metric tons)

Item	2004	2009	2014	2019	2024
Gross Fixed Investment (bil 2013\$)					
m tons/mil \$ GFCF					
Steel Pipe Demand					
Oil & Gas:					
OCTG					
Line Pipe					
Distribution					
Structural, Mechanical, & OEM					
Construction					
Industrial Processing & Other					
- imports					
+ exports					
Steel Pipe Production					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Behind the Wall Plumbing

US demand for behind the wall plumbing products is projected to advance 6.5 percent annually to \$12.4 billion in 2020. Pipe and sprinklers will be the fastest growing products, with PEX and PVC leading gains among pipe materials. Water distribution and drain, waste, and vent (DWV) will be the fastest growing applications. This study analyzes the \$9 billion US behind the wall plumbing market, with forecasts for 2020 and 2025 by product, market, application, and region. The study also evaluates company market share and profiles industry players.

#3392..... March 2016..... \$5300

Midstream Oil & Gas Equipment

Demand for equipment used in midstream oil and gas applications in the US is expected to decline to \$10.5 billion in 2019 as low oil and gas prices limit production growth and US midstream infrastructure becomes better adapted to the recent shifts in domestic energy production. This study analyzes the \$12.3 billion US market for equipment used in the midstream oil and gas infrastructure, with forecasts for 2019 and 2024 by product, application, market, and US region. The study also evaluates company market share and profiles industry participants.

#3376..... February 2016 \$5400

Construction Outlook in China

Construction expenditures in China will rise 7.8 percent per annum through 2019. Nonresidential building will remain the largest and fastest growing segment, driven by growing consumer spending for manufactured goods and services. Residential building construction will benefit from migration from rural to urban areas. This study analyzes the 17.6 trillion yuan construction industry in China, with forecasts for 2019 and 2024 by market and geographic region. The study also evaluates company market share and profiles industry participants.

#3299..... July 2015 \$5300

World Plumbing

Through 2018, global demand for plumbing fixtures and fittings will advance 5.3 percent annually to over \$70 billion. The Asia/Pacific region will post the fastest growth, with North America also expected to post significant gains. Growth in the residential construction market will outpace the nonresidential sector. This study analyzes the \$54.4 billion world plumbing product industry, with forecasts for 2018 and 2023 by type, material, market, world region, and for 23 countries. The study also evaluates company market share, and profiles industry participants.

#3253..... February 2015 \$6400

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- Establishing consistent economic & market forecasts
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- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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