

Global Oil Country Tubular Good (OCTG) Market: Analysis By Process (Seamless & Welded), By Grade (Premium & API), By Application (Onshore & Offshore), By Product (Well Casing, Production Tubing, Drill Pipe & Others), By Demand, By Production, By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global oil country tubular good (OCTG) market was valued at US\$22.95 billion in 2022 and is expected to be worth US\$33.96 billion in 2028. Oil country tubular goods (OCTG) are a type of solid rolled products that consist of casing, drill pipe, and tubing which are subjected to varying loading requirements based on the use. The massive use of hydrocarbons across the verticals of power generation, production, process, transportation, etc. has led to a significant increase in exploration and production operations, which are augmenting the demand for OCTG products.

The OCTG market has experienced significant growth in recent years, driven by a number of factors. One of the main drivers of growth has been the increasing demand for oil and gas as a source of energy. This has led to a rise in drilling and extraction activities, resulting in higher demand for OCTG. Additionally, advances in drilling technology have led to the development of more complex and challenging drilling operations, requiring more specialized and durable OCTG. The market is expected to grow at a CAGR of 6.75% over the projected period of 2023-2028.

In 2022, the global OCTG production was recorded at 12.76 million tons at a utilization capacity rate at 38.97%. High oil and gas prices have fueled an increase in both domestic and international rig counts. As the international recovery in project activity

accelerates, particularly in the Middle East across both short and long-cycle developments, global OCTG net capacity and capacity utilization are expected to rise. For both OCTG producer and steelmaker, utilization rates have been a major factor in determining earnings. Therefore, increasing utilization rate and net capacity are expected to be significant factors in driving OCTG production.

The global OCTG demand volume was 15.13 million tons in 2022. The increased demand for these products is due to number of factors, including increased global demand for oil and gas, technological advancements, and the need for more efficient oil and gas production and exploration processes.

Market Segmentation Analysis:

By Process: The report identifies two segments on the basis of process: Seamless and Welded. The seamless segment dominated the OCTG market. The increased use of seamless tube in the oil and gas industry is mostly due to the fact that it is extruded and drawn from a billet. A seamless tube has a short length and normally does not show signs of corrosion unless it is exposed to a severely corrosive environment. The increased exploration activity in off-shore areas, as well as the redevelopment of several oil fields, are likely to give abundant prospects for the expansion of the seamless process of OCTG market.

By Grade: The report identifies two segments on the basis of grade: Premium and API. The premium grade segment dominates the global market for oil country tubular goods. Oil and gas reserves are being developed and explored offshore, and this has resulted in a demand for high-grade transportation tubes that can withstand corrosion and provide leak-proof operation and sealing integrity of the connections even when loaded, bent, and subjected to high internal pressure. The demand for premium tubing to carry oil and gas from onshore and offshore fields to the consumer's location is likely to create significant chances for the premium segment oil country tubular goods to grow during the forecasted period.

By Application: The report identifies two segments on the basis of application: Onshore and Offshore. Onshore OCTG is expected to be the fastest growing segment in the forecasted period. Onshore OCTG is mainly used in drilling and production operations that are closer to the shore. Onshore OCTG is typically less expensive and easier to obtain, as it is more readily available and does not require the same level of specialized manufacturing and transportation. Onshore OCTG is also subject to less harsh conditions and less stringent safety regulations. The onshore OCTG market is also

being driven by the increasing use of horizontal drilling and hydraulic fracturing techniques.

By Product: The report identifies four segments on the basis of product: Well Casing, Production Tubing, Drill Pipe & Others. Well Casing is expected to be the fastest growing segment in the forecasted period. Well casing is a large diameter pipe that is inserted into a borehole's drilled section. This casing is typically held in place by cement or other materials placed between the casings and the wellbore. It is regarded as an important part of the well completion process. The rise in demand for well casing in this market is primarily due to the fact that it aids in the drilling process in a variety of ways, including providing a strong foundation to allow the use of high density drilling fluid to continue drilling deeper and providing a smooth internal bore for installing production equipment, all of which are expected to provide ample opportunities for the growth of the well casing product in the oil country tubular goods market.

By Region: In the report, the global oil country tubular good (OCTG) market is divided into five regions: North America, Asia Pacific, Europe, Middle East & Africa and Latin America. North America accounted for the maximum share of the global market in 2022. The US is one of the largest oil and gas producer. The use of horizontal and directional drilling activities has increased in the US shale drilling regions over the last decade. The liberation of the oil and gas industry in Canada and Mexico resulted in an increase in foreign investment, which aided the growth of the oil and gas industry. The increased use of premium quality products in remote areas with harsh environments has resulted in an increase in deep-water exploration, which drives market growth. Mexico is one of the major offshore deep-water reserves, and production is expected to increase during the forecast period.

The US has become a major importer of OCTG, sourcing products from countries such as Japan, South Korea, and several European countries. One of the key factors contributing to this growth is the easing of trade restrictions on OCTG imports in the region.

The Asia Pacific market is expected to expand significantly during the forecast period, driven by the increasing demand for energy in the region. The region is home to some of the world's largest oil and gas producing countries, including China, and India, which are driving the demand for OCTG products. In addition, the region is also witnessing an increase in exploration and production activities, which is further boosting the market. The increasing use of advanced drilling techniques, such as horizontal drilling and hydraulic fracturing, is also driving the market for OCTG in the Asia Pacific region.

Market Dynamics:

Growth Drivers: One of the key drivers of the market's expansion is the growing oil demand. Growing oil demand is a major driving factor of the OCTG (Oil Country Tubular Goods) market. As the global economy continues to expand, so does the demand for oil and gas, which are essential inputs for transportation, power generation, and industrial production. As a result, more oil and gas wells are being drilled, leading to increased demand for OCTG products. OCTG products, such as drilling pipe, casing, and tubing, are critical components in the drilling and production of oil and gas wells. Other significant growth factors of the market include rising energy consumption, growth in hydraulic fracturing activities, accelerating economic growth, technological innovation in drilling techniques and growth in footage of wells drilled.

Challenges: However, some challenges are impeding the growth of the market such as increasing OCTG prices in the US and environmental issues. The steel and metal industry, which includes the production of OCTG, is highly sensitive to fluctuations in supply and demand, as well as changes in raw material prices. As a result, prices for OCTG products in the US have risen in recent years, presenting several challenges to the OCTG market. As prices increase, suppliers may struggle to meet the demand for OCTG products, leading to shortages and supply chain disruptions. Decreased demand, decreased competitiveness, increased inflation, and government intervention are all potential consequences of these rising prices, which can hamper the growth of the global OCTG market.

Trends: The market is projected to grow at a fast pace during the forecast period, due to escalating investment in offshore drilling activities, increasing R&D spending in energy sector, rise in horizontal directional drilling for oil & gas excavation and easing trade restriction in North America. Offshore drilling activities refer to the process of extracting oil and natural gas from beneath the ocean floor. These activities have become increasingly popular in recent years due to the increasing demand for energy and the depletion of onshore reserves. The increasing investment in offshore drilling activities has also led to advancements in technology and equipment. As companies look to extract oil and natural gas from increasingly difficult environments, they are investing in new technologies and equipment to make the process more efficient and cost-effective, which is expected to drive the growth of OCTG market in coming years.

Impact Analysis of COVID-19 and Way Forward:

COVID 19 pandemic has negatively impacted every facet of the global economy, including the OCTG market. OCTG is a vital component of the oil and gas industry, used in the production of oil and gas wells. The global COVID-19 pandemic caused a dramatic drop in the rig count. The lower rig count resulted in lower rates of oil and gas E&P activities, causing demand for tubular and casting products to fall which eventually hampered the global OCTG market in 2020. In addition to the decrease in demand, the COVID-19 pandemic has caused a disruption in the supply chain of OCTG. Moreover, the pandemic has caused global oil demand to plummet. This has caused a major glut of stored crude oil as producers were unable to sell their products. This has caused prices to fall to their lowest levels in decades, with Brent crude prices dropping to as low as US\$15 per barrel in April 2020.

Despite the short-term challenges posed by the pandemic, the post COVID outlook for the oil country tubular good (OCTG) market looks positive. As the world slowly emerges from the pandemic, the demand for OCTG is expected to increase. The oil industry is likely to witness a surge in exploration activities, resulting in an increase in the demand for OCTG. This is primarily due to the fact that OCTG is used in the extraction of oil and gas, and thus the increased exploration activities are expected to drive the demand for OCTG. Furthermore, the demand for OCTG is expected to be driven by the increased demand for energy in the long-term. As the world transitions to renewable sources of energy, oil and gas will remain a major energy source. This will result in an increase in the demand for OCTG to support exploration activities.

Competitive Landscape:

Global oil country tubular good (OCTG) market is moderately consolidated, with increasing acquisitions, collaboration, and product launches. Competition in the OCTG market is intense, with players focusing on improving product quality, increasing production capacity, and expanding their global reach. Price competition is also a significant factor in the market, with companies looking to offer competitive prices to gain a larger share of the market.

The key players in the global oil country tubular good (OCTG) market are:

Tenaris S.A.

ArcelorMittal S.A.

EVRAZ PLC

JFE Holdings Inc.

MRC Global Inc.

NOV Inc.

Nippon Steel Corp

PAO TMK

United States Steel Corporation

Vallourec S.A.

ILJIN Steel Co., Ltd.

J-Hobbs Machine Corp.

Canam Pipe & Supply

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Oil Country Tubular Good (OCTG): An Overview

2.1.1 Types of OCTG Products

2.1.2 OCTG Manufacturing Process

2.2 Oil Country Tubular Good (OCTG) Segmentation: An Overview

2.2.1 Oil Country Tubular Good (OCTG) Segmentation

2.2.2 Oil Country Tubular Good (OCTG) Segmentation by Product

3. GLOBAL MARKET ANALYSIS

3.1 Global Oil Country Tubular Good (OCTG) Market: An Analysis

3.1.1 Global Oil Country Tubular Good (OCTG) Market: An Overview

3.1.2 Global Oil Country Tubular Good (OCTG) Market by Value

3.1.3 Global Oil Country Tubular Good (OCTG) Market by Process (Seamless & Welded)

3.1.4 Global Oil Country Tubular Good (OCTG) Market by Grade (Premium & API)

3.1.5 Global Oil Country Tubular Good (OCTG) Market by Application (Onshore & Offshore)

3.1.6 Global Oil Country Tubular Good (OCTG) Market by Product (Well Casing, Production Tubing, Drill Pipe, & Others)

3.1.7 Global Oil Country Tubular Good (OCTG) Market by Region (North America, Asia Pacific, Europe, Middle East & Africa & Latin America)

3.2 Global Oil Country Tubular Good (OCTG) Market: Demand Analysis

3.2.1 Global Oil Country Tubular Good (OCTG) Market by Demand: An Overview

3.2.2 Global Oil Country Tubular Good (OCTG) Market by Demand

3.2.3 Global Oil Country Tubular Good (OCTG) Demand by Region (the US & Canada, China & Russia, Latin America and ROW)

3.3 Global Oil Country Tubular Good (OCTG) Market: Production Analysis

3.3.1 Global Oil Country Tubular Good (OCTG) Market by Production: An Overview

3.3.2 Global Oil Country Tubular Good (OCTG) Market by Production

3.4 Global Oil Country Tubular Good (OCTG) Market: Process Analysis

3.4.1 Global Oil Country Tubular Good (OCTG) Market by Process: An Overview

3.4.2 Global Seamless Oil Country Tubular Good (OCTG) Market by Value

3.4.3 Global Welded Oil Country Tubular Good (OCTG) Market by Value

- 3.5 Global Oil Country Tubular Good (OCTG) Market: Grade Analysis
 - 3.5.1 Global Oil Country Tubular Good (OCTG) Market by Grade: An Overview
 - 3.5.2 Global Premium Oil Country Tubular Good (OCTG) Market by Value
 - 3.5.3 Global API Oil Country Tubular Good (OCTG) Market by Value
- 3.6 Global Oil Country Tubular Good (OCTG) Market: Application Analysis
 - 3.6.1 Global Oil Country Tubular Good (OCTG) Market by Application: An Overview
 - 3.6.2 Global Onshore Oil Country Tubular Good (OCTG) Market by Value
 - 3.6.3 Global Offshore Oil Country Tubular Good (OCTG) Market by Value
- 3.7 Global Oil Country Tubular Good (OCTG) Market: Product Analysis
 - 3.7.1 Global Oil Country Tubular Good (OCTG) Market by Product: An Overview
 - 3.7.2 Global Well Casing Oil Country Tubular Good (OCTG) Market by Value
 - 3.7.3 Global Product Tubing Oil Country Tubular Good (OCTG) Market by Value
 - 3.7.4 Global Drill Pipe Oil Country Tubular Good (OCTG) Market by Value
 - 3.7.5 Global Other Oil Country Tubular Good (OCTG) Products Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 North America Oil Country Tubular Good (OCTG) Market: An Analysis
 - 4.1.1 North America Oil Country Tubular Good (OCTG) Market: An Overview
 - 4.1.2 North America Oil Country Tubular Good (OCTG) Market by Value
 - 4.1.3 North America Oil Country Tubular Good (OCTG) Market by Region (The US, Canada & Mexico)
 - 4.1.4 The US Oil Country Tubular Good (OCTG) Market by Value
 - 4.1.5 The US Oil Country Tubular Good (OCTG) Market by Imports
 - 4.1.6 The US Oil Country Tubular Good (OCTG) Imports by Sources
 - 4.1.7 Canada Oil Country Tubular Good (OCTG) Market by Value
 - 4.1.8 Mexico Oil Country Tubular Good (OCTG) Market by Value
- 4.2 Asia Pacific Oil Country Tubular Good (OCTG) Market: An Analysis
 - 4.2.1 Asia Pacific Oil Country Tubular Good (OCTG) Market: An Overview
 - 4.2.2 Asia Pacific Oil Country Tubular Good (OCTG) Market by Value
 - 4.2.3 Asia Pacific Oil Country Tubular Good (OCTG) Market by Region (China, India, Japan, South Korea & Rest of Asia Pacific)
 - 4.2.4 China Oil Country Tubular Good (OCTG) Market by Value
 - 4.2.5 India Oil Country Tubular Good (OCTG) Market by Value
 - 4.2.6 Japan Oil Country Tubular Good (OCTG) Market by Value
 - 4.2.7 South Korea Oil Country Tubular Good (OCTG) Market by Value
 - 4.2.8 Rest of Asia Pacific Oil Country Tubular Good (OCTG) Market by Value
- 4.3 Europe Oil Country Tubular Good (OCTG) Market: An Analysis
 - 4.3.1 Europe Oil Country Tubular Good (OCTG) Market: An Overview

- 4.3.2 Europe Oil Country Tubular Good (OCTG) Market by Value
- 4.3.3 Europe Oil Country Tubular Good (OCTG) Market by Region (The UK, Italy, Germany & Rest of Europe)
- 4.3.4 The UK Oil Country Tubular Good (OCTG) Market by Value
- 4.3.5 Italy Oil Country Tubular Good (OCTG) Market by Value
- 4.3.6 Germany Oil Country Tubular Good (OCTG) Market by Value
- 4.3.7 Rest of Europe Oil Country Tubular Good (OCTG) Market by Value
- 4.4 Middle East & Africa Oil Country Tubular Good (OCTG) Market: An Analysis
 - 4.4.1 Middle East & Africa Oil Country Tubular Good (OCTG) Market: An Overview
 - 4.4.2 Middle East & Africa Oil Country Tubular Good (OCTG) Market by Value
- 4.5 Latin America Oil Country Tubular Good (OCTG) Market: An Analysis
 - 4.5.1 Latin America Oil Country Tubular Good (OCTG) Market: An Overview
 - 4.5.2 Latin America Oil Country Tubular Good (OCTG) Market by Value

5. REGIONAL OCTG DEMAND ANALYSIS

- 5.1 The US & Canada Oil Country Tubular Good (OCTG) Market: Demand Analysis
 - 5.1.1 The US & Canada Oil Country Tubular Good (OCTG) Market by Demand
- 5.2 China & Russia Oil Country Tubular Good (OCTG) Market: Demand Analysis
 - 5.2.1 China & Russia Oil Country Tubular Good (OCTG) Market by Demand
- 5.3 Latin America Country Tubular Good (OCTG) Market: Demand Analysis
 - 5.3.1 Latin America Oil Country Tubular Good (OCTG) Market by Demand

6. IMPACT OF COVID-19

- 6.1 Impact of COVID-19
 - 6.1.1 Impact of COVID-19 on OCTG Market
 - 6.1.2 Fall in the Rig Count
 - 6.1.3 Decreased Oil Production
 - 6.1.4 Post COVID Scenario

7. MARKET DYNAMICS

- 7.1 Growth Drivers
 - 7.1.1 Growing Oil Demand
 - 7.1.2 Rising Energy Consumption
 - 7.1.3 Growth in Hydraulic Fracturing Activities
 - 7.1.4 Accelerating Economic Growth
 - 7.1.5 Technological Innovation in Drilling Techniques

- 7.1.6 Growth in Footage of Wells Drilled
- 7.2 Challenges
 - 7.2.1 Increasing OCTG Prices in the US
 - 7.2.2 Environmental Issues
- 7.3 Market Trends
 - 7.3.1 Escalating Investment in Offshore Drilling Activities
 - 7.3.2 Increasing R&D Spending in Energy Sector
 - 7.3.3 Rise in Horizontal Directional Drilling for Oil & Gas Excavation
 - 7.3.4 Easing Trade Restrictions in North America

8. COMPETITIVE LANDSCAPE

- 8.1 Global Premium Oil Country Tubular Good (OCTG) Players by Market Share
- 8.2 The US Oil Country Tubular Good (OCTG) Players by Market Share

9. COMPANY PROFILES

- 9.1 Tenaris S.A.
 - 9.1.1 Business Overview
 - 9.1.2 Operating Segments
 - 9.1.3 Business Strategies
- 9.2 ArcelorMittal S.A.
 - 9.2.1 Business Overview
 - 9.2.2 Operating Segments
 - 9.2.3 Business Strategies
- 9.3 EVRAZ Plc
 - 9.3.1 Business Overview
 - 9.3.2 Operating Segments
- 9.4 JFE Holdings Inc.
 - 9.4.1 Business Overview
 - 9.4.2 Operating Segments
 - 9.4.3 Business Strategies
- 9.5 MRC Global Inc.
 - 9.5.1 Business Overview
 - 9.5.2 Sales by Industry Sector
 - 9.5.3 Business Strategies
- 9.6 NOV Inc.
 - 9.6.1 Business Overview
 - 9.6.2 Operating Segments

- 9.7 Nippon Steel Corp
 - 9.7.1 Business Overview
 - 9.7.2 Operating Segments
 - 9.7.3 Business Strategies
- 9.8 PAO TMK
 - 9.8.1 Business Overview
 - 9.8.2 Operating Segments
 - 9.8.3 Business Strategies
- 9.9 United States Steel Corp.
 - 9.9.1 Business Overview
 - 9.9.2 Operating Segments
 - 9.9.3 Business Strategies
- 9.10 Vallourec S.A.
 - 9.10.1 Business Overview
 - 9.10.2 Revenue by Market
 - 9.10.3 Business Strategies
- 9.11 ILJIN Steel Co., Ltd.
 - 9.11.1 Business Overview
- 9.12 J-Hobbs Machine Corp.
 - 9.12.1 Business Overview
- 9.13 Canam Pipe & Supply
 - 9.13.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Types of OCTG Products

Figure 2: OCTG Manufacturing Process

Figure 3: Oil Country Tubular Good (OCTG) Segmentation

Figure 4: Oil Country Tubular Good (OCTG) Segmentation by Product

Figure 5: Global Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 6: Global Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 7: Global Oil Country Tubular Good (OCTG) Market by Process; 2022 (Percentage, %)

Figure 8: Global Oil Country Tubular Good (OCTG) Market by Grade; 2022 (Percentage, %)

Figure 9: Global Oil Country Tubular Good (OCTG) Market by Application; 2022 (Percentage, %)

Figure 10: Global Oil Country Tubular Good (OCTG) Market by Product; 2022 (Percentage, %)

Figure 11: Global Oil Country Tubular Good (OCTG) Market by Region; 2022 (Percentage, %)

Figure 12: Global Oil Country Tubular Good (OCTG) Market by Demand; 2018-2022 (Million Ton)

Figure 13: Global Oil Country Tubular Good (OCTG) Market by Demand; 2023-2028 (Million Ton)

Figure 14: Global Oil Country Tubular Good (OCTG) Demand by Region; 2022 (Percentage, %)

Figure 15: Global Oil Country Tubular Good (OCTG) Market by Production; 2018-2022 (Million Ton)

Figure 16: Global Oil Country Tubular Good (OCTG) Market by Production; 2023-2028 (Million Ton)

Figure 17: Global Seamless Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 18: Global Seamless Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 19: Global Welded Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 20: Global Welded Oil Country Tubular Good (OCTG) Market by Value;

2023-2028 (US\$ Billion)

Figure 21: Global Premium Oil Country Tubular Good (OCTG) Market by Value;

2018-2022 (US\$ Billion)

Figure 22: Global Premium Oil Country Tubular Good (OCTG) Market by Value;

2023-2028 (US\$ Billion)

Figure 23: Global API Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 24: Global API Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 25: Global Onshore Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 26: Global Onshore Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 27: Global Offshore Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 28: Global Offshore Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 29: Global Well Casing Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 30: Global Well Casing Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 31: Global Product Tubing Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 32: Global Product Tubing Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 33: Global Drill Pipe Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 34: Global Drill Pipe Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 35: Global Other Oil Country Tubular Good (OCTG) Products Market by Value; 2018-2022 (US\$ Billion)

Figure 36: Global Other Oil Country Tubular Good (OCTG) Products Market by Value; 2023-2028 (US\$ Billion)

Figure 37: North America Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 38: North America Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 39: North America Oil Country Tubular Good (OCTG) Market by Region; 2022 (Percentage, %)

Figure 40: The US Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 41: The US Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 42: The US Oil Country Tubular Good (OCTG) Market by Imports; August 2018-August 2022 (Kilo Ton)

Figure 43: The US Oil Country Tubular Good (OCTG) Imports by Sources; 2021 & 2022 (Percentage, %)

Figure 44: Canada Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 45: Canada Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 46: Mexico Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 47: Mexico Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Million)

Figure 48: Asia Pacific Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 49: Asia Pacific Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 50: Asia Pacific Oil Country Tubular Good (OCTG) Market by Region; 2022 (Percentage, %)

Figure 51: China Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 52: China Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 53: India Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 54: India Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 55: Japan Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 56: Japan Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 57: South Korea Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 58: South Korea Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Million)

Figure 59: Rest of Asia Pacific Oil Country Tubular Good (OCTG) Market by Value;

2018-2022 (US\$ Billion)

Figure 60: Rest of Asia Pacific Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 61: Europe Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 62: Europe Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 63: Europe Oil Country Tubular Good (OCTG) Market by Region; 2022 (Percentage, %)

Figure 64: The UK Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 65: The UK Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Million)

Figure 66: Italy Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 67: Italy Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Million)

Figure 68: Germany Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Million)

Figure 69: Germany Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Million)

Figure 70: Rest of Europe Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 71: Rest of Europe Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 72: Middle East & Africa Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 73: Middle East & Africa Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 74: Latin America Oil Country Tubular Good (OCTG) Market by Value; 2018-2022 (US\$ Billion)

Figure 75: Latin America Oil Country Tubular Good (OCTG) Market by Value; 2023-2028 (US\$ Billion)

Figure 76: The US & Canada Oil Country Tubular Good (OCTG) Market by Demand; 2018-2022 (Million Ton)

Figure 77: The US & Canada Oil Country Tubular Good (OCTG) Market by Demand; 2023-2028 (Million Ton)

Figure 78: China & Russia Oil Country Tubular Good (OCTG) Market by Demand; 2018-2022 (Million Ton)

Figure 79: China & Russia Oil Country Tubular Good (OCTG) Market by Demand; 2023-2028 (Million Ton)

Figure 80: Latin America Oil Country Tubular Good (OCTG) Market by Demand; 2018-2022 (Kilo Ton)

Figure 81: Latin America Oil Country Tubular Good (OCTG) Market by Demand; 2023-2028 (Million Ton)

Figure 82: The US Oil & Gas Rig Count, 2016-2021 (Units)

Figure 83: The US Oil Production by Region, 2017-2021 (Terawatt-hour, TWh)

Figure 84: Global Oil Demand, 2019-2023 (Million of Barrels per Day)

Figure 85: Global Primary Energy Consumption by Sources, 2018-2021 (Terawatt Hours)

Figure 86: The US Shale Gas and Tight Oil Plays Production, 2020-2050 (Trillion Cubic Feet)

Figure 87: Global Real GDP Annual Percentage Change, 2020-2025 (Percentage, %)

Figure 88: The US OCTG Prices, April 2020-August 2022 (US\$ Thousand/Ton)

Figure 89: Global Offshore Drilling Market by Value, 2018 & 2026 (US\$ Billion)

Figure 90: Global Premium Oil Country Tubular Good (OCTG) Players by Market Share; 2022 (Percentage, %)

Figure 91: The US Oil Country Tubular Good (OCTG) Players by Market Share; 2022 (Percentage, %)

Figure 92: Tenaris S.A. Net Sales by Segments, 2021 (Percentage, %)

Figure 93: ArcelorMittal S.A. Sales by Segments, 2021 (Percentage, %)

Figure 94: EVRAZ Plc Revenues by Segments, 2021 (Percentage, %)

Figure 95: JFE Holdings Inc. Net Sales by Segments, 2021 (Percentage, %)

Figure 96: MRC Global Inc. Sales by Industry Sector, 2021 (Percentage, %)

Figure 97: NOV Inc. Revenue by Segments, 2021 (Percentage, %)

Figure 98: Nippon Steel Corp Revenue by Segments, 2021 (Percentage, %)

Figure 99: PAO TMK Revenue by Segments, 2021 (Percentage, %)

Figure 100: United States Steel Corp. Net Sales by Segments, 2021 (Percentage, %)

Figure 101: Vallourec S.A. Revenue by Market, 2021 (Percentage, %)

Table 1: North America Trade Restriction Decisions

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