

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

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Table 1: North America Trade Restriction Decisions

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