

Global Submerged Arc Welding Wires Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Submerged Arc Welding Wires market size is expected to reach \$ 2283 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Submerged Arc Welding Wires are welding materials that generate an electric arc between a continuously fed bare metal electrode and the workpiece under a layer of granular fusible flux, melting and entering the weld. They feature high deposition efficiency, minimal spatter, deep penetration, stable weld formation, and ease of mechanization and automation. They are primarily used for high-efficiency welding of thick plates, long straight welds, and circumferential welds. Major applications include large-diameter straight and spiral steel pipes, oil and gas pipelines and water pipelines, bridges and building steel structures, ships and offshore platforms, boilers and pressure vessels, storage tanks, construction machinery, railway vehicles, wind turbine towers and offshore wind power monopile foundations, and chemical equipment. The upstream of the industry chain mainly includes low-carbon steel and alloy steel wire rods, stainless steel and nickel-based alloy wire rods, ferromanganese, ferrosilicon, chromium, nickel, molybdenum and other alloy materials, copper plating materials, pickling agents, wire drawing lubricants, molds, wire coils and packaging materials; the midstream includes steel composition design, wire rod rolling, pickling and descaling, multi-pass drawing, annealing, copper-plated or copper-free surface treatment, composite powder core filling, precision winding, wire diameter and wire feeding performance testing, welding wire-flux matching test, tensile and impact testing of deposited metal, as well as certification by classification societies, pressure equipment and customers; the downstream consists of welding material distributors, welding flux suppliers, submerged arc welding equipment and automation system companies entering steel pipe mills, shipyards, steel structure plants, wind power equipment plants

and heavy equipment manufacturers. The value creation of welding wire manufacturers has extended from single wire processing to welding wire-flux combination design, welding process qualification, on-site parameter optimization and automation system adaptation.

Key Findings

Global production volume of submerged arc welding (SAW) wires reached 792,000 metric tons in 2025.

The global average selling price was approximately \$1,853 per metric ton in 2025.

Typical gross profit margins for manufacturers range from 15% to 35%.

Market Trends

The SAW wire industry is upgrading from traditional large-diameter solid carbon steel wires to high-strength low-temperature steel, heat-resistant steel, stainless steel, nickel-based alloys, and metal-cored wires. Competition is shifting from merely increasing deposition rates to focusing on the stability of mechanical properties in wire-flux combinations, low-temperature impact toughness, diffusible hydrogen control, and compatibility with automated systems. Multi-wire and twin-wire SAW processes are seeing expanded application in wind turbine towers, offshore wind monopiles, steel pipes, and pressure vessels. Metal-cored wires enable higher deposition rates and welding speeds at the same current levels, while large-capacity drum packaging helps reduce downtime associated with wire changes. Technologies such as visual recognition, laser tracking, and adaptive control are being adopted for groove measurement, weld path planning, and real-time parameter adjustment, driving the evolution of SAW from mechanization toward autonomous welding.

Market Dynamics

Drivers

Global steel consumption, energy infrastructure, shipbuilding and offshore engineering,

steel pipe manufacturing, and wind power equipment construction constitute the primary drivers of demand for SAW wires. Wind power represents a rapidly growing downstream sector; large-scale wind turbine towers and monopile foundations feature extensive long straight welds and circumferential welds, making them well-suited for narrow-gap, multi-wire, and high-deposition SAW processes.

Restraints

Submerged arc welding (SAW) is primarily suited for flat and horizontal welding positions; its adaptability to short welds, complex spatial structures, thin plates, and frequent workstation changes is inferior to that of MIG/MAG and flux-cored arc welding. Consequently, market demand is concentrated in specific heavy-plate manufacturing scenarios. Weld performance depends not only on the welding wire but also on flux basicity, activity, particle size, drying status, recovery ratio, heat input, and base metal dilution rate. End customers typically require procedure qualification and certification based on specific wire-flux combinations, which limits the ability to quickly switch between brands. While multi-wire, narrow-gap, and adaptive SAW systems can boost efficiency, the high investment required for equipment, welding gantries, sensors, and tooling has limited their adoption rate among small and medium-sized manufacturers.

Opportunities

Sectors such as offshore wind power, high-grade pipeline steel, LNG storage tanks, deep-sea equipment, nuclear power, and high-parameter pressure equipment will drive increased demand for SAW wires offering high strength, low-temperature toughness, and heat and corrosion resistance. Offshore wind monopiles are evolving toward larger diameters and thicker walls, spurring the application of narrow-gap welding, tandem welding, and high-deposition metal-cored wires. Another opportunity lies in welding digitalization; suppliers can integrate welding wires, fluxes, process databases, visual tracking, defect prevention, and quality records into comprehensive system solutions, thereby reducing rework rates and reliance on the experience of highly skilled welders. Companies capable of producing high-strength steel, stainless steel, nickel-based alloy, and surfacing products can also improve their profitability structure by increasing the proportion of high-value-added products.

Challenges

Fluctuations in the prices of raw materials—such as steel wire rod, manganese, silicon, chromium, nickel, molybdenum, and copper—directly impact welding wire costs, with nickel-based, stainless steel, and heat-resistant steel products carrying higher price and inventory risks. Meanwhile, certification processes for projects involving classification societies, pressure equipment, wind power, bridges, and pipeline steel are lengthy; deviations in chemical composition, wire diameter, surface condition, or wire-flux compatibility can lead to reduced impact toughness, slag inclusions, cracking, or large-scale rework.

Segment Insights

By structure, solid submerged arc welding (SAW) wires account for the largest share, with carbon steel and low-alloy steel products making up the vast majority; these are primarily used for high-volume welding in steel pipes, steel structures, shipbuilding, storage tanks, and pressure vessels. Metal-cored and flux-cored SAW wires comprise the remainder of the market, showing rapid growth in applications involving high-strength steel, low-temperature steel, wear-resistant surfacing, and high-productivity operations; they offer advantages such as flexible alloy composition adjustment, high deposition rates, and controllable weld bead formation.

Downstream Market Opportunities

Steel pipes and pipelines, steel structures and bridges, and shipbuilding and offshore engineering are key application areas for SAW wires, largely because these sectors involve extensive use of thick plates as well as long straight and circumferential welds. High-potential future applications include offshore wind turbine towers and monopiles, LNG storage tanks, high-strength pipeline steel, ultra-large vessels, pressure vessels, and heavy engineering machinery. Customer purchasing priorities are shifting from the unit price of welding wire to the comprehensive cost per weld, with greater focus on deposition efficiency, flux consumption, rework rates, impact toughness, and uptime for automated continuous operations. Suppliers capable of providing large-capacity packaging, low-temperature/high-strength products, integrated wire-and-flux certification, and on-site process support are better positioned to enter the long-term supply chains of major clients in the steel pipe, shipbuilding, wind power, and energy equipment sectors.

Regional Insights

The Asia-Pacific region is the world's largest market for both the production and consumption of SAW wires. The Chinese market is driven by the scale of industries such as steel pipes, shipbuilding, bridges, steel structures, engineering machinery, and wind power equipment, while Japan and South Korea possess technological advantages in specialized welding materials for shipbuilding, low-temperature steel, high-strength steel, and offshore engineering. The European market focuses on offshore wind power, pressure equipment, bridges, energy, and high-alloy products, with customers placing a premium on low-temperature performance, certifications, and low-carbon manufacturing. Demand in North America stems primarily from oil and gas pipelines, storage tanks, pressure vessels, steel structures, and heavy equipment. Markets in the Middle East, Latin America, and other regions are relatively smaller in scale, yet energy pipelines, refining and petrochemical facilities, port developments, and infrastructure projects can generate significant, albeit periodic, demand.

Report Scope

This report studies the global Submerged Arc Welding Wires production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Submerged Arc Welding Wires and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Submerged Arc Welding Wires that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Submerged Arc Welding Wires total production and demand, 2021-2032, (Kilotons)

Global Submerged Arc Welding Wires total production value, 2021-2032, (USD Million)

Global Submerged Arc Welding Wires production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on

production site)

Global Submerged Arc Welding Wires consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Submerged Arc Welding Wires domestic production, consumption, key domestic manufacturers and share

Global Submerged Arc Welding Wires production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Submerged Arc Welding Wires production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Submerged Arc Welding Wires production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Submerged Arc Welding Wires market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Tianjin Golden Bridge Welding Materials Group, Lincoln Electric, ESAB, Tianjin Bridge Welding Materials Group, Kobe Steel, Hobart Brothers Filler Metals, Atlantic China Welding Consumables, Hyundai Welding, voestalpine Böhler Welding, Shandong Solid Solder, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Submerged Arc Welding Wires market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the

forecast year.

Global Submerged Arc Welding Wires Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Submerged Arc Welding Wires Market, Segmentation by Type:

Solid Submerged Arc Welding Wire

Metal-Cored Submerged Arc Welding Wire

Fluid-Cored Submerged Arc Welding Wire

Global Submerged Arc Welding Wires Market, Segmentation by Material:

Carbon Steel

Stainless Steel

Nickel-Based Alloy

Global Submerged Arc Welding Wires Market, Segmentation by Welding Configuration:

Single Wire

Double Wire

Multi-Wire

Global Submerged Arc Welding Wires Market, Segmentation by Wire Diameter:

Fine Wire ? 2.4 mm

Conventional Industrial Welding Wire 2.5–4.0 mm

Large Diameter Wire ? 4.0 mm

Global Submerged Arc Welding Wires Market, Segmentation by Application:

Oil and Gas Pipeline and Water Pipeline

Bridge and Building Steel Structure

Ship and Offshore Platform

Construction Machinery

Railway Vehicle

Chemical Equipment

Others

Companies Profiled:

Tianjin Golden Bridge Welding Materials Group

Lincoln Electric

ESAB

Tianjin Bridge Welding Materials Group

Kobe Steel

Hobart Brothers Filler Metals

Atlantic China Welding Consumables

Hyundai Welding

voestalpine Böhler Welding

Shandong Solid Solder

Nippon Steel Welding & Engineering

Kiswel

Magmaweld

Shandong Juli Welding

HIT Welding Industry

Pittarc

Kuang Tai Metal Industrial

Welding Alloys

Selectarc

Changzhou Changjiang Welding Material

Bavaria Schweisstechnik

Beijing Jinwei Welding Material

Novametal

Venus Wires

Nevatia Steel & Alloys Pvt.Ltd.

Gongyi Yulin Welding Material

Baoding Lanyu Welding Materials

Shandong Zander Resourcing

Shijiazhuang Shiqiao Welding Materials

Key Questions Answered

1. How big is the global Submerged Arc Welding Wires market?
2. What is the demand of the global Submerged Arc Welding Wires market?
3. What is the year over year growth of the global Submerged Arc Welding Wires market?
4. What is the total value of the global Submerged Arc Welding Wires market?
5. Who are the Major Players in the global Submerged Arc Welding Wires market?
6. What are the growth factors driving the market demand?

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