

Heat Treated Steel Plates Market Size, Share & Trends Analysis Report By Process (Hardening & Tempering, Case Hardening, Annealing), By Application, By Region, And Segment Forecasts, 2020 - 2027

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Abstracts

The global heat treated steel plates market size is expected to exceed USD 7.9 billion by 2027, expanding at a CAGR of 3.9% over the forecast period, according to a new report by Grand View Research, Inc. Growing industrial output in China's automotive, construction, and industrial machinery industries is projected to remain one of the key factors driving the market for heat treated steel plates.

Despite economic uncertainty, China's investments in the manufacturing sector are growing at a healthy rate. As per China's leading industry regulators, it has grown by 8.7% y-o-y basis in the first 3 quarters of 2018. Strong government policies on encouragement of private investment are likely to fuel market growth. Moreover, China's industrial output observed 6.2% y-o-y in 2018, wherein the automotive, railway, and equipment and machinery sectors were the major contributors.

Rapid growth in urbanization is projected to increase the investments in highways, railways, energy, and other infrastructure. The network of highways and railways is still low in China as compared to the developed countries, and hence the country is set to boost its economy by numerous infrastructure projects. For instance, the country gave approval to 26 infrastructure projects in 2019, including the rail projects in Kunming, Chongqing, Chengdu, Zhengzhou, and Xian. The 26 projects are worth an investment of around USD 142 billion. Growth in infrastructure is projected to contribute to the demand for construction machinery and equipment, thereby boosting the demand for heat treated steel plates.

Growing aerospace and defense budgets in various countries are likely to push the demand for heat treated steel plates as these steel plates find application in helicopters, tanks, aircraft, and ships. The defense budget in U.S. is the highest in the world and has a strong impact on the manufacturing sector. The budget in the country increased from USD 606 billion in 2018 to USD 681 billion in 2019, which was more than the combined budget of Russia, China, Germany, France, U.K., and Japan.

On the basis of end use, the automotive and transportation segment is projected to witness the fastest growth from 2020 to 2027. Steel is one of the sustainable materials and has high penetration in automotive components and assemblies. Heat treatment is a vital attribute of automotive and transportation components manufacturing. If the components are not heat treated, they are unable to withstand stress and may observe crack development or failure. Processes including normalizing, annealing, stress relieving, hardening, and tempering are likely to witness continuous demand on account of incessant automotive production and rising demand for new aircraft, thus driving the growth of heat treated steel plates market.

Further key findings from the study suggest:

Based on process, hardening and tempering accounted for a share of 25.2% in 2019 and is projected to witness continuous growth owing to increasing need among the end-use industries for improved hardness, toughness, and strength in various parts

Case hardening is projected to expand at the fastest CAGR of 4.8% over the forecast period on account of durability and surface hardness provided by this process

By end use, the automotive and transportation segment accounted for the largest share of 49% and is likely to maintain its position over the next few years. Growing aircraft demand due to increase in air passenger traffic and rapidly evolving electric vehicles sector are the primary factors responsible for the segment growth

The construction application segment was valued at USD 702.3 million in 2019. Positive outlook of the construction industry in emerging economies and increasing investment in highways, railways, and bridges are projected to fuel the demand for heat treated steel plates

Asia Pacific held the largest share in the market for heat treated steel plates in 2019. The region is anticipated to witness lucrative growth from 2020 to 2027 due to expansion of the construction, automotive, and industrial machinery industries in China and India

Key vendors in the market for heat treated steel plates include Nippon Steel Corporation, Baosteel, Tata Steel, ArcelorMittal, POSCO, and Outokumpu.

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