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Global Hydrogen-induced Cracking Resistant Steel Market Growth 2026-2032

https://marketpublishers.com/r/G011697B7703EN.html
Date: May 2026
Pages: 115
Price: US$ 3,660.00 (Single User License)
ID: G011697B7703EN

Abstracts

The global Hydrogen-induced Cracking Resistant Steel market size is predicted to grow from US$ 960 million in 2025 to US$ 1474 million in 2032; it is expected to grow at a CAGR of 6.3% from 2026 to 2032.

Hydrogen-induced Cracking Resistant Steel refers to a class of steels specifically developed for sour service environments, especially wet H2S-containing oil and gas, refining, gas treatment, pipeline, and pressure vessel applications, where resistance to hydrogen-induced cracking is required in addition to strength, toughness, and weldability. It is designed to solve the problem that conventional carbon steels and low-alloy steels may develop internal cracking, stepwise cracking, and related damage when atomic hydrogen generated by aqueous sulfide corrosion diffuses into the steel and accumulates at inclusions, segregated zones, or other microstructural traps. Historically, this product category emerged alongside the expansion of sour oil and gas production and the increasing severity of refinery and gas-processing service conditions, which led the industry to adopt dedicated qualification methods such as NACE/AMPP TM0284 and to develop cleaner steelmaking routes with lower sulfur and phosphorus, improved inclusion shape control, reduced segregation, and optimized rolling and heat treatment. In upstream terms, the category depends on iron ore, scrap, coke, ferroalloys, calcium treatment materials, and other steelmaking inputs, together with supporting processes such as continuous casting, rolling, heat treatment, welding consumables, inspection, and pressure vessel or linepipe fabrication. Industry product literature from SSAB, Industeel, voestalpine, and JFE consistently describes HIC-resistant steels as sour-service grades produced through special steelmaking practices aimed at improving resistance to hydrogen-induced cracking in wet hydrogen sulfide environments.In 2025, the global hydrogen-induced cracking resistant steel market had a production capacity of approximately 500,000 tons, sales volume of approximately

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434,000 tons, an average price of about USD 2,260 per ton, and gross margins generally ranging from 17% to 28%.

The current market is primarily supported by oil and gas production, natural gas gathering and transmission, refining desulfurization, sour-media processing, and related pressure vessel and pipeline projects, which means demand is driven more by reliability upgrading under severe service conditions than by ordinary steel substitution. Public technical materials consistently show that hydrogen-induced cracking resistant steel remains closely tied to wet H2S sour service, because these environments promote hydrogen entry into steel and trigger HIC, SSC, and related damage mechanisms. As a result, buyers place greater emphasis on steel cleanliness, inclusion control, segregation reduction, weldability, and third-party qualification testing rather than on strength level alone. Product information from SSAB, JFE, and Nippon Steel all highlights sour service performance, wet H2S resistance, NACE/AMPP testing, and clean-steel production, indicating that this is fundamentally a highly engineered and specification-driven niche market.

Future development is likely to focus on suitability for more severe environments and on balancing a broader set of performance requirements. As some oil and gas projects move toward higher H2S partial pressures, higher pressure conditions, and more complex transport environments, market expectations are shifting from basic crack resistance toward a combination of strength, controlled hardness, weld and heat-affected-zone stability, through-thickness consistency, and long-term integrity. Nippon Steel?s 2025 technical report states that SSC has still occurred in sour-resistant line pipes used in high-pressure H2S environments, which is pushing the industry to develop next-generation steels by addressing hardness criteria, hydrogen absorption, microstructure, and manufacturing technology together. JFE?s published work similarly emphasizes that achieving both strength and HIC resistance requires deeper control over inclusions, segregation, and microstructure. This suggests that future competition will increasingly depend on integrated metallurgical design and project validation capability rather than on a single steel grade alone.

The main market drivers include continued development of high-sulfur oil and gas resources, replacement of aging sour-service pipelines and vessels, lower tolerance for failure risk among operators, and tighter testing and design requirements. The main restraints are the high technical threshold, long qualification cycle, strict end-user approval process, and the fact that failures in real service rarely involve HIC alone; they may also involve SSC, SOHIC, weld-related weaknesses, local hard zones, and fluctuations in the corrosive medium. AMPP?s framework for H2S-related cracking itself

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reflects this multi-mechanism complexity, while steelmaker technical publications repeatedly show that HIC resistance cannot be achieved through simple alloy adjustment alone, but depends on full-process control from refining and casting to rolling and heat treatment. This gives the segment durable demand and meaningful technical barriers, but also limits the speed at which it can expand compared with standard pressure vessel steel or conventional linepipe steel markets.

LP Information, Inc. (LPI) ' newest research report, the ?Hydrogen-induced Cracking Resistant Steel Industry Forecast? looks at past sales and reviews total world Hydrogen-induced Cracking Resistant Steel sales in 2025, providing a comprehensive analysis by region and market sector of projected Hydrogen-induced Cracking Resistant Steel sales for 2026 through 2032. With Hydrogen-induced Cracking Resistant Steel sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Hydrogen-induced Cracking Resistant Steel industry.

This Insight Report provides a comprehensive analysis of the global Hydrogen-induced Cracking Resistant Steel landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Hydrogen-induced Cracking Resistant Steel portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Hydrogen-induced Cracking Resistant Steel market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Hydrogen-induced Cracking Resistant Steel and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Hydrogen-induced Cracking Resistant Steel.

This report presents a comprehensive overview, market shares, and growth opportunities of Hydrogen-induced Cracking Resistant Steel market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Chromium Molybdenum Steels

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Austenitic Stainless Steels

Other

Segmentation by Product Form:

Plate Steel

Heavy Plate Steel

Line Pipe Steel

Pressure Vessel Steel

Segmentation by Sour Service Severity:

Mild Sour Service Steel

Standard Sour Service Steel

Severe Sour Service Steel

Segmentation by Application:

Oil and Gas

Refining and Petrochemicals

Hydrogen Storage and Transport

Power and Nuclear

Others

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa

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Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Proterial

Nippon Steel

ArcelorMittal

POSCO

ThyssenKrupp

Voestalpine

Baosteel Group

Masteel

U.S. Steel

Tata Steel

JFE Steel

Ansteel Group

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Dillinger Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Hydrogen-induced Cracking Resistant Steel market?

What factors are driving Hydrogen-induced Cracking Resistant Steel market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Hydrogen-induced Cracking Resistant Steel market opportunities vary by end market size?

How does Hydrogen-induced Cracking Resistant Steel break out by Type, by Application?

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