

# Global Metallurgically Clad Pipes Market Growth 2026-2032

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## Abstracts

The global Metallurgically Clad Pipes market size is predicted to grow from US\$ 1982 million in 2025 to US\$ 2634 million in 2032; it is expected to grow at a CAGR of 4.3% from 2026 to 2032.

Metallurgically clad pipes are bimetallic composite pipes consisting of a base carrier pipe—typically carbon steel or low-alloy steel—that is metallurgically bonded to one or more layers of corrosion- or wear-resistant alloy materials. This structure combines the mechanical strength and cost-effectiveness of the base pipe with the superior surface properties of the alloy layer, such as enhanced corrosion or abrasion resistance. Metallurgically clad pipes offer reduced weight and material usage compared to full-alloy pipes, and are widely employed in industries such as oil & gas pipelines, chemical processing, power generation, and marine or desalination applications. The upstream of metallurgically clad pipes covers the smelting and processing of carbon steel or low alloy base pipes and corrosion-resistant/wear-resistant alloy materials; the downstream includes pipe manufacturing, engineering installation and its application and operation and maintenance in the oil and gas, chemical, seawater treatment, electric power and other industries.

## Key Findings

Global Metallurgically Clad Pipes production reached 262,000 tons in 2025

The global average selling price reached US\$7,732 per ton in 2025

Oil and gas remains the core application, particularly in subsea, sour-service and high-pressure pipelines

Hot roll bonding and weld overlay represent two major industrial routes for metallurgical cladding

The market is highly specification-driven, with material qualification, bonding integrity and welding quality forming key competitive barriers

## Market Trends

The development of Metallurgically Clad Pipes is moving toward higher-performance CRA combinations, optimized cladding thickness, more demanding offshore qualification and greater manufacturing automation. Carbon-steel or high-strength low-alloy-steel backing combined with 316L, duplex, super duplex, Alloy 625 or Alloy 825 allows suppliers to balance pressure capability, corrosion resistance and alloy consumption. In severe H<sub>2</sub>S, CO<sub>2</sub>, chloride, HP/HT and deepwater environments, operators increasingly focus on bond integrity, fatigue behavior, pipe-end geometry, weldability and non-destructive testing rather than material selection alone.

Manufacturers are also reducing the amount of expensive CRA required while maintaining corrosion performance; BUTTING, for example, has developed a metallurgically clad solution using a thinner high-alloy cladding layer for selected applications. Deepwater pipeline development and CO<sub>2</sub> transportation are broadening technical requirements beyond conventional onshore oil and gas service, while digital dimensional inspection, automated weld overlay and tighter process control are improving repeatability for project-scale production.

## Market Dynamics

### Drivers

The principal demand driver is the need to transport or process corrosive media under conditions where conventional carbon steel has insufficient corrosion resistance while solid CRA pipe is economically unattractive. Sour oil and gas containing H<sub>2</sub>S and CO<sub>2</sub>, high-chloride fluids, offshore production, subsea flowlines, risers, refineries and chemical plants all create demand for composite pipe structures that separate the pressure-bearing and corrosion-resistance functions. Industry adoption is also supported by established qualification frameworks such as API 5LD and DNV-ST-F101, which provide specifications for CRA clad or lined pipe and submarine pipeline systems.

### Restraints

Metallurgically clad pipe manufacturing has substantially higher technical and quality-control requirements than conventional carbon-steel pipe. Hot roll bonded products require stable clad-plate quality and subsequent forming and seam-welding control, while weld overlay requires precise management of heat input, deposition rate, dilution, cladding thickness and defect formation. Offshore products additionally face stringent requirements for dimensional tolerances, fatigue properties, weld-joint performance and NDT. Dependence on nickel-based alloys and high-grade stainless steels also exposes manufacturing costs to alloy-price volatility, while long qualification cycles and project-specific specifications limit rapid supplier substitution.

## Opportunities

Deepwater and high-sour gas developments remain important opportunities as operators move into reservoirs with more demanding pressure, temperature and corrosion conditions. In parallel, CO<sub>2</sub> transportation and injection infrastructure creates an emerging application for corrosion-resistant piping because moisture and impurities in CO<sub>2</sub> streams can create aggressive internal environments. BUTTING has supplied clad pipes for CO<sub>2</sub> injection applications, while Proclad is positioning CRA-lined and weld-overlay solutions for carbon capture, utilization and storage infrastructure. Chemical processing, desalination and other water-treatment systems also provide opportunities for tailored stainless-steel, nickel-alloy, titanium and other dissimilar-metal combinations where lifecycle corrosion performance is critical.

## Challenges

The key challenge is achieving consistent metallurgical bonding and downstream weld integrity over long pipe lengths and across different material combinations. Interface defects, local lack of bonding, weld-overlay dilution, residual stress, CRA damage during forming, dimensional deviations and defects around longitudinal or girth welds can materially affect qualification. Offshore reel-lay and deepwater applications further increase fatigue and deformation requirements. At the same time, demand remains project-driven, meaning manufacturers must balance large project orders with uneven utilization of specialized cladding, forming, welding, heat-treatment and inspection capacity.

## Industry Chain Analysis

The upstream chain consists primarily of carbon and low-alloy steel plate or pipe, stainless steel, duplex and super duplex stainless steel, nickel-based alloys such as Alloy 625 and Alloy 825, and welding consumables used for overlay processes. The

midstream stage varies by technology: hot roll bonded and explosive-bonded clad plates are formed into pipe and longitudinally welded; weld-overlay products deposit CRA directly onto the internal surface of the base pipe; other processes can form metallurgically bonded composite structures through routes such as centrifugal casting followed by extrusion. Manufacturing value is concentrated in material matching, interface control, forming, welding, heat treatment, machining, NDT and project qualification. Downstream customers are predominantly oil and gas operators, EPC contractors, subsea engineering companies, chemical and petrochemical plants, and water-treatment infrastructure projects. API 5LD and DNV-ST-F101 requirements make certification, process qualification and traceability important parts of the value delivered by manufacturers.

## Segment Insights

By technology, Roll Bonding is primarily represented by hot roll bonded clad plate subsequently formed and welded into pipe, providing a continuous metallurgical interface and strong suitability for large-diameter line pipe and demanding offshore service. JSW has produced hot roll bonded clad plate for decades, while BUTTING manufactures metallurgically clad pipes from metallurgically bonded plate. Weld Overlay provides greater flexibility in pipe diameter, clad thickness and component geometry and is widely used for pipes, fittings, flanges and spools; Proclad and Cladtek both maintain dedicated weld-overlay capabilities. Explosive Bonding is particularly relevant to difficult dissimilar-metal combinations and specialized chemical-service piping, while the Others segment includes alternative metallurgical processes such as centrifugal casting and extrusion-based bimetallic pipe production. Across all technologies, the competitive direction is shifting toward higher bonding reliability, reduced CRA consumption and improved project-level manufacturability rather than simply increasing cladding thickness.

## Downstream Market Opportunities

Oil and gas represents the principal downstream opportunity because metallurgically clad pipe offers a combination of high pressure resistance and internal corrosion protection for subsea flowlines, risers, gathering lines, sour-gas pipelines and process piping. Chemical plants create additional demand for specialized alloy combinations exposed to acids and highly corrosive process streams; NobelClad, for example, provides clad pipe solutions for applications including acetic acid and other aggressive chemical processes. Water treatment and desalination provide another addressable market where chloride resistance and long service life support the use of stainless,

duplex, nickel-alloy or other corrosion-resistant cladding. Emerging CO<sub>2</sub> transportation and injection systems may gradually expand the Other Applications segment.

## Regional Insights

Europe and Asia-Pacific represent important manufacturing centers for metallurgically clad pipe and associated clad materials, supported by established producers, plate manufacturing capabilities and specialized welding infrastructure. China is strengthening its capability in higher-specification products: Jiuli Group operates both mechanical and metallurgical bimetallic pipe processes, while Zhongyou BSS (Qinhuangdao) obtained qualification for a nickel-alloy/acid-resistant-carbon-steel metallurgically clad pipe developed for deepwater oil and gas service in 2025. The Middle East is a particularly active project market because of sour-gas, offshore and petrochemical investment, and suppliers including Proclad and Longtaidi have established extensive regional project exposure. South America, particularly Brazil's offshore sector, is another significant high-specification pipeline demand center, while North America retains opportunities in oil and gas, chemicals and emerging CO<sub>2</sub> infrastructure.

## Competitive Landscape Analysis

Competition in Metallurgically Clad Pipes is differentiated by manufacturing route, dimensional capability, CRA material expertise, offshore qualification and ability to supply complete piping packages. Butting Group, Inox Tech, EEW and JSW have capabilities associated with metallurgically bonded clad material and large-diameter or project-grade pipe production, while Proclad, Cladtek Holdings, Canadoil Group and Longtaidi have stronger exposure to weld overlay and integrated clad piping solutions. NobelClad differentiates through explosion-bonded dissimilar-metal technology and specialized clad pipe systems, while Vallourec provides metallurgically clad seamless-pipe solutions for severe operating environments. In China, Panyu Chu Kong Steel Pipe, Xinxing Ductile Iron Pipes, Jiuli Group, Xi'an Xiangyang Aerospace Materials, Longtaidi and Zhongyou BSS (Qinhuangdao) represent different technical routes ranging from CRA clad line pipe and metallurgical composite pipe to explosion-based composite technologies and weld-overlay products. The competitive threshold is increasingly determined by the ability to qualify material combinations, control metallurgical interfaces and welding, meet demanding offshore tolerances and deliver integrated pipes, bends, fittings and spools rather than by nominal production capacity alone.

## Report Scope

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

This Insight Report provides a comprehensive analysis of the global Metallurgically Clad Pipes 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 Metallurgically Clad Pipes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Metallurgically Clad Pipes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Metallurgically Clad Pipes and breaks down the forecast by Process, 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 Metallurgically Clad Pipes.

This report presents a comprehensive overview, market shares, and growth opportunities of Metallurgically Clad Pipes market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Process:

Explosive Bonding

Roll Bonding

Weld Overlay

Others

### **Segmentation by Lining Material:**

Austenitic Stainless Steel

Duplex Stainless Steel

Nickel-based Alloy

### **Segmentation by Outer Diameter:**

OD ≤273mm

273mm <OD≤ 610mm

OD >610mm

### **Segmentation by Application:**

Oil & Gas

Chemical Industry

Water Treatment

Others

### **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

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.

Butting Group

Proclad

NobelClad

JSW

Inox Tech

EEW

Cladtek Holdings

Canadoil Group

Vallourec

Panyu Chu Kong Steel Pipe

Xinxing Ductile Iron Pipes

Jiuli Group

Xi'an Xiangyang Aerospace Materials

Longtaidi

Zhongyou BSS ( Qinhuangdao )

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Metallurgically Clad Pipes market?

What factors are driving Metallurgically Clad Pipes market growth, globally and by region?

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

How do Metallurgically Clad Pipes market opportunities vary by end market size?

How does Metallurgically Clad Pipes break out by Process, by Application?

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