

China Petroleum & Natural Gas Drilling and Transmission Steel Pipe Market Report, 2012-2015

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Abstracts

Due to uncertainties including sluggish global economic recovery and volatile geopolitical environment in Middle East and North Africa since 2011, the global crude oil prices have long been lingering at as high as USD110/barrel, fueling the strong surge in the oil & gas exploration expenditure worldwide. Consequently, the demand for steel tube products such as oil well pipes and oil & gas transmission pipes has been greatly boosted.

In China petroleum & natural gas transmission market, "West-to-East natural gas transmission" project and offshore petroleum and natural gas resources exploitation during the 12th Five-year Planning period are expected to lead the tide of oil & gas pipeline construction. In China, the total length of oil & gas pipeline network will hit 150,000 km as of 2015, a sharp increase compared with the 82,000 km in 2011. During 2012-2015, a total of seven oil & gas transmission trunk networks and ten regional supporting pipe networks are scheduled to start construction in China, expecting to generate the demand for 11.38 million tons of SSAW and LSAW.

At present, SSAW and LSAW for petroleum & natural gas transmission in China witness high market concentrate rate, with the market share dominating by nine enterprises including Shandong Shengli Steel Pipe, Baoji Petroleum Steel Pipe and Panyu Chu Kong Steel Pipe and five affiliated companies under CNPC and Sinopec.

Oil Well Pipe Market

Due to China's robust demand for petroleum and natural gas in recent years, three leading petroleum tycoons - CNPC, CNOOC, and Sinopec - have increased their investment in petroleum exploitation. In 2012, CNPC and Sinopec planned to input

RMB251.1 billion in exploitation and development, up 14% compared with that in 2011. As such, CNOOC spent more than RMB58 billion to intensify exploitation and development, with the respective investment in exploitation, development and production accounting for 17%, 68% and 14%. Driven by this, the oil well pipe market demand of China is expected to hit 4.7 million tons in 2015.

Oil Well Pipe Manufactures

In 2012, the annual capacity of oil well pipe of China realized 10.50 million tons. However, most oil well pipe enterprises can only produce API products. As a result, low- and medium-end products saw excess capacity, while some high-end products are short of supply and needed to import from other countries. Thus far, the supply pattern in China oil well pipe market has been relatively stable, with more than 80% market share being dominated by leading producers such as BaoSteel, Jiangsu Changbao Steel Tube, WSP Holdings Limited, Tianda Oil Pipe, and Valine Steel.

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