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Electric Resistance Welded Pipes and Tubes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Standard Pipes, Pressure Tubing, Others), By Material (Carbon Steel, Stainless Steel, Alloy Steel, Others), By Application (Oil & Gas, Automotive, Construction, Power Generation, Chemical Processing & Mining, Others), By Region, and By Competition, 2020-2030F

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Abstracts

Market Overview

The Global Electric Resistance Welded Pipes and Tubes Market was valued at USD 80.48 Billion in 2024 and is expected to reach USD 109.51 Billion by 2030 with a CAGR of 5.11% during the forecast period.

The global Electric Resistance Welded (ERW) Pipes and Tubes market has witnessed steady growth in recent years and is projected to expand further due to increasing demand from various industrial and infrastructure sectors. ERW pipes and tubes are produced by welding metal plates or coils longitudinally without using filler material, which makes them cost-effective and suitable for a broad range of applications including oil and gas transportation, construction, automotive, water and wastewater management, and mechanical structures. Among these, the oil and gas industry represents the largest consumer, primarily due to the need for pipelines that are durable, efficient, and economical for both upstream and downstream applications. The construction sector follows closely, with growing urbanization and infrastructure development across emerging markets driving the need for structural and plumbing

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components made from ERW pipes.

Material-wise, carbon steel holds the largest share due to its affordability and suitability for low- to medium-pressure applications, while stainless steel ERW pipes are gaining traction in industries requiring corrosion resistance and hygiene, such as chemicals and food processing. Technological advancements such as high-frequency (HF) welding and improved non-destructive testing (NDT) techniques have also contributed to higher-quality output, enabling wider adoption in critical applications. Moreover, growing environmental regulations and sustainability goals have pushed manufacturers to invest in more energy-efficient production processes and recyclable materials.

Key Market Drivers

Surge in Infrastructure Development and Urbanization

The growth of urban populations and infrastructure modernization initiatives across developing and developed economies is a key driver of ERW pipes and tubes demand. Governments globally are prioritizing robust urban transit systems, water networks, and public utilities, all of which rely on reliable piping solutions. In India, over 80,000 kilometers of new highways are under development by 2025, requiring large quantities of steel tubes and drainage piping. In China, over 55% of new building structures are adopting pre-engineered frameworks, utilizing ERW steel components for columns and conduits. The United States allocated over USD 1.2 trillion toward infrastructure repair and renewal by 2026, and ERW tubes are playing a crucial role in water, sewage, and gas pipelines under this initiative. In Africa, 70% of planned urban expansion projects through 2030 require basic utility networks, stimulating regional demand for durable welded steel pipes. Additionally, Southeast Asia has committed to over 500 smart city projects, all of which require extensive structural and piping support using ERW formats. The high speed of production and lower costs of ERW tubes make them ideal for large-volume deployment in public infrastructure. Their availability in various diameters and strengths makes them versatile for plumbing, scaffolding, HVAC systems, and more. As construction activities rise, particularly in Asia-Pacific and Latin America, the demand for high-volume, affordable tubing solutions like ERW is expected to rise proportionately.

Key Market Challenges

Fluctuations in Raw Material Prices

Volatility in steel prices presents a significant challenge for ERW pipe manufacturers

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since raw material costs often account for 60 to 70percent of total production expense. Sharp swings of 10–20percent in global steel prices over six month periods can erode profitability if contracts cannot be adjusted quickly. For instance, a 15percent rise in hot rolled coil costs may immediately reduce margins by several dollars per ton, forcing producers to delay orders or renegotiate terms. These fluctuations also make it difficult to project budget for multi year infrastructure contracts where steel prices may shift between ordering and delivery. This volatility can trigger inventory bottlenecks: if steel prices drop, manufacturers face holding losses; if prices spike, buyers delay procurement. Contractual fixed price terms expose both suppliers and buyers to risk. Moreover, sudden increases in logistics costs—such as a 25percent jump in freight charges—compound these raw material price swings, impacting landed cost. Smaller regional manufacturers with limited hedging capabilities are disproportionately affected; they may see a 30percent erosion of operating margin during peak volatility. In essence, price instability of inputs creates risks in cash flow, contract fulfillment, and supply chain coordination, undermining the stability of ERW market growth.

Key Market Trends

Expansion into Renewable Energy Infrastructure Applications

ERW pipes are increasingly being specified in renewable energy installations—particularly solar mounting frameworks, wind turbine towers, and biogas pipelines. In solar farms, tubular frames using ERW steel now account for 35–40percent of total structural components thanks to their light weight and modular fabrication. Wind tower producers have shifted to ERW tubes for nacelle supports and transition pieces, citing 20percent reductions in structural weight compared to alternatives. Biogas and hydrogen distribution projects are starting to leverage ERW pressure tubes, where durability and weld integrity are essential. As global renewable energy capacity expands annually by double digits, the share of ERW consumption in these sectors is steadily climbing, creating diversified demand pathways beyond traditional oil and gas.

Key Market Players

Vallourec S.A.

Interpipe Group

Welspun Corp Limited

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Tube Products of India

Surya Roshni Limited

Jindal Pipes Ltd.

Madhav KRG Group

APL Apollo Tubes Limited

Bhuwalka Pipes Private Limited

Surani Steel Tubes Limited

Report Scope:

In this report, the Global Electric Resistance Welded Pipes and Tubes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Electric Resistance Welded Pipes and Tubes Market, By Type:

Standard Pipes

Pressure Tubing

Others

Electric Resistance Welded Pipes and Tubes Market, By Material:

Carbon Steel

Stainless Steel

Alloy Steel

Others

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Electric Resistance Welded Pipes and Tubes Market, By Application:

- Oil & Gas
- Automotive
- Construction
- Power Generation
- Chemical Processing & Mining
- Others

Electric Resistance Welded Pipes and Tubes Market, By Region:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - Germany
  - France
  - United Kingdom
  - Italy
  - Spain
- South America
  - Brazil

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Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electric Resistance Welded Pipes and Tubes Market.

Available Customizations:

Global Electric Resistance Welded Pipes and Tubes Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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Detailed analysis and profiling of additional market players (up to five).

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