

North America Welded Steel Tubes Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Steel Grades (Carbon Base Grades, Boron Grades, Alloy Grades, HSLA, AHSS, and Other Steel Grades), Application (Exhaust, Automotive, Appliances, Medical Devices, HVAC, Burner, Conveyor Belts, and Other Applications), Type (ERW, LSAW, and SSAW), and Coating Type (Clear Coat and Non-Coated)

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Abstracts

The North America welded steel tubes market is projected to grow significantly, reaching an estimated US\$ 59,364.1 million by 2031, up from US\$ 40,096.5 million in 2024, reflecting a compound annual growth rate (CAGR) of 6.2% from 2025 to 2031. This growth is driven by various factors, including increased construction activities, advancements in the oil and gas sector, and the rising demand for electric vehicles (EVs).

The market is primarily segmented into three countries: the United States, Canada, and Mexico, with the US holding the largest market share in 2024. The construction industry in North America is experiencing robust growth, fueled by substantial government investments in both residential and non-residential infrastructure projects. These projects encompass a wide range of developments, including housing units, airports, hospitals, hotels, office buildings, and educational institutions. According to data from the US Census Bureau, national construction spending saw a year-on-year increase of 4.6% in September 2024, compared to the same month in 2023. This surge in construction activity is driving the demand for welded steel tubes, which are essential

for building structures, steel frames, and supports.

In September 2024, the US International Trade Commission (ITC) announced plans to initiate sunset reviews of antidumping and countervailing duties on circular welded carbon quality steel line pipe imports from China. The enforcement of these duties is expected to limit imports from China, thereby creating opportunities for local manufacturers in North America to supply welded steel tubes across various sectors, including manufacturing, automotive, and medical devices.

The oil and gas industry is another significant contributor to the growth of the welded steel tubes market in North America. The International Energy Agency (IEA) reported that crude oil production in North America increased by 66% from 2000 to 2021, reaching 46,233,753 Terajoules (TJ). Welded steel tubes, known for their smooth inner walls and corrosion resistance, are ideal for transporting oil and gas, making them a preferred choice in this sector due to their durability and strength.

The rise in electric vehicle sales and production is also influencing the demand for welded steel tubes. A report by Cox Automotive indicated that approximately 346,309 EVs were sold in Q3 2024, marking a 5% increase from Q2. The share of EV sales reached 8.9%, the highest recorded to date, up from 7.8% in Q3 2023. Major manufacturers like Tesla are contributing to this growth, with significant sales of models such as the Cybertruck. Welded steel tubes play a crucial role in the structural integrity and performance of electric vehicles, enhancing safety, design flexibility, and cost-effectiveness.

Investment in the aerospace and defense sectors across North America is further propelling the welded steel tube market. The Aerospace Industries Association (AIA) reported that the US aerospace and defense industry achieved over US\$ 955 billion in sales in 2023, reflecting a 7.1% growth from the previous year. This sector's demand for high-quality materials, including welded steel tubes, is expected to continue driving market growth.

The North America welded steel tubes market is segmented by steel grades, applications, types, and coating types. In terms of steel grades, Carbon Base Grades held the largest market share in 2024. The automotive sector was the leading application for welded steel tubes, while Electric Resistance Welded (ERW) tubes dominated the market by type. Non-coated tubes also represented the largest share in the coating type segment.

Companies in the welded steel tube market are increasingly focusing on sustainability by adopting recycled steel in their manufacturing processes. This shift is driven by growing environmental awareness and the need to reduce carbon footprints. For instance, Atlas Tube, a division of Zekelman Industries, published an Environmental Product Declaration (EPD) for its hollow structural sections, highlighting its commitment to transparency regarding the environmental impact of its products. Additionally, Tubos Reunidos Group announced the production of over 10,500 tons of net-zero seamless steel tubes, with a significant portion sold in the US, reflecting the industry's move towards greener practices.

The US construction industry is also witnessing growth due to rising demand for modern infrastructure, industrialization, and population growth. The US Commerce Department reported a 3.5% year-on-year increase in construction spending in June 2023. This growth is driven by the need for robust materials for infrastructure projects, including bridges, buildings, and public works, further increasing the demand for welded steel tubes.

In summary, the North America welded steel tubes market is poised for substantial growth, driven by various sectors, including construction, oil and gas, automotive, and aerospace. The focus on sustainability and local manufacturing will likely shape the market dynamics in the coming years.

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