



**China Petroleum and Natural Gas Drilling
and Transmission Steel Pipe Market Report,
2013-2016**

May 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

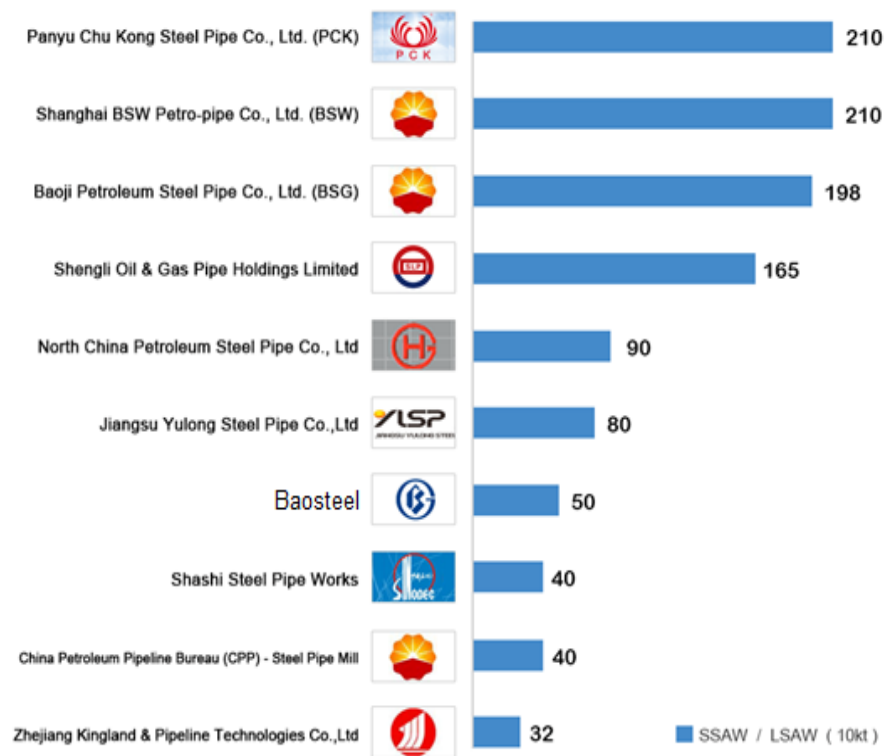
Abstract

Along with the sustained and stable development of China's economy as well as the accelerated industrialization, China's demand for oil and natural gas has kept rising rapidly in recent years. In 2013, China's oil and natural gas consumption reached 498 million tons and 167.6 billion cubic meters respectively, up 4.5% and 14.6 % year-on-year.

Amid the jumping demand for oil and natural gas, China has enhanced the construction of oil and gas pipeline networks. In 2013, Chinese oil and gas pipeline network pattern initially formed with the total mileage of 106,200 kilometers. In accordance with "Twelfth Five-Year Plan", the total length will be about 150,000 km by 2015, which will boost the development of oil and gas transmission steel pipes and other related materials to a certain extent.

Welded pipes and seamless steel pipes, especially SSAW (Spirally Submerged Arc Welding) and LSAW (Longitudinally Submerged Arc Welding), are required in the construction of oil and gas transmission pipeline networks. As of the end of 2013, China had been building and proposed to set up six trunk oil and gas transmission pipelines; CNPC and CNOOC had been establishing and planned 10 gas pipelines which will be completed successively in 2014-2016. The above 16 pipelines need about 11.19 million tons of SSAW (70%) and LSAW (30 %).

Capacity of Leading SSAW / LSAW Manufacturers in China, 2013



Source: China Petroleum and Natural Gas Drilling and Transmission Steel Pipe Market Report, 2013-2016 by ResearchInChina

In China, major SSAW and LSAW manufacturers consist of Shengli Oil & Gas Pipe, PCK, Baoji Petroleum Steel Pipe and so on. PCK is China's largest longitudinal welded pipe manufacturer. At the end of 2013, PCK's four production bases were equipped with six longitudinal welded pipe production lines with the annual capacity of 1.9 million tons, two spiral welded pipe machine production lines and a high-frequency ERW (electirc resistance welding) pipe production line with the combined annual capacity of 810,000 tons.

Oil well pipes are mainly used in oil and gas exploration and exploitation, divided into tubing, casings and drill pipes. In 2013, China produced about 5.8 million tons of oil well pipes, and the apparent consumption approximated 4.5 million tons.

At present, the competition pattern in Chinese oil well pipe market remains stable in a relative sense, and main players like Baosteel, Changbao Steeltube, WUXI SEAMLESS OIL PIPE, Anhui Tianda and Hengyang Valin Steel Tube occupy more than 80% market share. Moreover, to adapt themselves to the new situation that oil exploration heads toward deep and ultra deep wells as well as geological environments become increasingly complex, some manufacturers represented by Changbao Steeltube are adjusting their product mix. By the end of 2013, Changbao Steeltube had accomplished 80 % of its high-end oil well pipe processing line project involved with the total investment of RMB159 million. The project is to upgrade products on the basis of the original equipment, including one 85,000-ton non-API tubing heat treatment production line and one 40,000-ton finished pipe thread line.

The report highlights the followings:

- ✘ Overview of global and Chinese petroleum and natural gas market, including supply and demand analysis;
- ✘ Overview of China seamless steel pipe industry, covering supply, import & export, demand and price analysis;
- ✘ Overview of China welded steel pipe industry, covering supply, import, export, demand and consumption structure;
- ✘ Overview of Chinese oil and gas-use pipe market, including market size and competition pattern;
- ✘ Operation and oil & gas pipe business of 15 major Chinese steel pipe manufacturers such as Baosteel, Valin Steel, Changbao Steeltube, and Kingland Pipeline.

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