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%).
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.
1 Overview of Global Petroleum and Natural Gas Market
1.1 Petroleum Market
1.1.1 Supply
1.1.2 Demand
1.2 Natural Gas Market
1.2.1 Supply
1.2.2 Demand

2 Overview of Chinese Petroleum and Natural Gas Market
2.1 Petroleum Market
2.1.1 Supply
2.1.2 Demand
2.2 Natural Gas Market
2.2.1 Supply
2.2.2 Demand

3 Overview of China Seamless Steel Pipe Industry
3.1 Definition
3.2 Supply
3.3 Import and Export
3.3.1 Export
3.3.2 Import
3.4 Demand
3.5 Price

4 Overview of China Welded Steel Pipe Industry
4.1 Definition
4.2 Supply
4.3 Import and Export
4.3.1 Export
4.3.2 Import
4.4 Demand

5 Overview of Chinese Oil and Gas-use Pipe Market
5.1 Transmission Pipes
5.1.1 Market Scale
5.1.2 Market Competition
5.2 Oil Well Pipes
5.2.1 Market Scale
5.2.2 Market Competition

6 Major Chinese Oil and Gas Pipe Manufacturers
6.1 Baosteel
6.1.1 Profile
6.1.2 Operation
6.1.3 Revenue Structure
6.1.4 Gross Margin
6.1.5 Steel Pipe Business
6.1.6 Forecast and Outlook
6.2 Valin Steel
6.2.1 Profile
6.2.2 Operation
6.2.3 Revenue Structure
6.2.4 Gross Margin
6.2.5 Steel Pipe Business
6.2.6 Forecast and Outlook
6.3 Changbao Steeltube
6.4 Kingland Pipeline
6.5 Yulong Steel Pipe
6.6 Shandong Molong
6.7 Tianda Oil Pipe
6.8 Tianjin Pipe
6.9 Shengli Oil & Gas Pipe
6.10 PCK
6.11 Pangang Group Chengdu Steel & Vanadium
6.12 Chengde Steel Pipe
6.13 Wuxi Seamless Oil Pipe
6.14 Zhenda Steel
6.15 Baoji Petroleum Steel Pipe
6.15.1 Profile
6.15.2 Operation

7 Summary and Forecast
7.1 Summary
7.2 Forecast
• Distribution of Global Proved Oil Reserves, 2012
• Global Oil Reserves / Production Ratio (by Region), 2012
• Global Oil Output, 2006-2013
• Global Oil Consumption, 2006-2013
• OPEC Reference Basket, 2011-2013
• Distribution of Global Proved Gas Reserves, 2012
• Global Natural Gas Reserves / Production Ratio (by Region), 2012
• Global Natural Gas Output, 2006-2013
• Global Natural Gas Consumption, 2006-2013
• China's Oil Output, 2006-2013
• China's Oil Consumption, 2006-2013
• China's Crude Oil Import and Export Volume, 2006-2013
• China's Natural Gas Output, 2006-2013
• China's Natural Gas Consumption, 2006-2013
• China's Seamless Steel Pipe Output, 2006-2013
• China's Seamless Steel Pipe Output (by Region), 2013
• Number of Various Seamless Steel Pipe Production Lines and Capacity Distribution in China, 2012
• Output Share of 8 Large State-owned Seamless Steel Pipe Enterprises (by Variety) in China, 2012
• Export Share of 8 Large State-owned Seamless Steel Pipe Enterprises in China, 2012
• China's Seamless Steel Pipe Export Volume, 2006-2013
• China's Seamless Steel Pipe Export Value, 2006-2013
• China's Seamless Steel Pipe Import Volume, 2006-2013
• China's Seamless Steel Pipe Import Value, 2006-2013
• China's Seamless Steel Pipe Apparent Consumption, 2006-2013
• China's Seamless Steel Pipe Sales Structure (by Region), 2013
Selected Charts

- Seamless Steel Pipe Sales Structure of Key Enterprises in China, 2013
- China’s Seamless Steel Pipe Spot Price, 2006-2013
- China’s Welded Pipe Output, 2006-2013
- China’s Welded Pipe Export Volume, 2006-2013
- China’s Welded Pipe Export Value, 2006-2013
- China’s Welded Pipe Import Volume, 2006-2013
- China’s Welded Pipe Import Value, 2006-2013
- China’s Welded Pipe Apparent Consumption, 2006-2013
- China’s Welded Pipe Sales Structure (by Region), 2013
- Welded Pipe Sales Structure of Key Enterprises in China, 2013
- China’s Length of Oil and Gas Transmission Pipeline, 2006-2015E
- China’s Demand for Steel Pipes Used in Trunk Oil and Gas Transmission Pipeline Networks, 2012-2015E
- Demand of Gas Fields of CNPC and CNOOC for Steel Used in Supporting Pipeline Networks, 2011-2015E
- Capacity of Major SSAW and LSAW Producers in China, 2013
- Some Completed, Ongoing and Planned Pipelines of Sinopec and CNOOC, 2011-2015E
- Structure of China’s Demand for Oil and Gas Pipelines, 2013
- Global Oil Well Pipe Demand, 2010-2015E
- Exploration & Exploitation Scale and Growth Rate of CNPC and Sinopec, 2006-2013
- China’s Oil Well Pipe Demand, 2009-2013
- China’s Oil Well Pipe Output and Apparent Consumption, 2000-2015E
- Baosteel's Revenue and Net Income, 2008-2013
- Baosteel's Revenue Breakdown and Percentage (by Product), 2011-2013
- Baosteel's Gross Margin (by Region), 2008-2013
- Baosteel's Main Steel Pipe Subsidiaries, 2013
- Baosteel's Steel Pipe Sales Volume, 2008-2013
Selected Charts

- Baosteel's Steel Pipe Revenue and Gross Margin, 2009-2013
- Baosteel's Revenue and Net Income, 2010-2016E
- Revenue and Net Income of Valin Steel, 2008-2013
- Revenue Structure of Valin Steel (by Product), 2010-2013
- Gross Margin of Valin Steel, 2011-2013
- Steel Pipe Revenue and Gross Margin of Valin Steel, 2008-2013
- Revenue and Net Income of Valin Steel, 2012-2016E
- Revenue and Net Income of Changbao Steeltube, 2008-2013
- Revenue Breakdown and Percentage of Changbao Steeltube (by Product), 2011-2013
- Operating Revenue Breakdown and Percentage of Changbao Steeltube (by Region), 2011-2013
- Gross Margin of Changbao Steeltube (by Product), 2010-2013
- Main Production Lines and Capacity of Changbao Steeltube, 2013
- Revenue and Net Income of Changbao Steeltube, 2010-2016E
- Revenue and Net Income of Kingland Pipeline, 2008-2013
- Revenue Breakdown and Percentage of Kingland Pipeline (by Product), 2011-2013
- Operating Revenue Breakdown and Percentage of Kingland Pipeline (by Region), 2011-2013
- Gross Margin of Kingland Pipeline (by Product), 2008-2013
- Output of Kingland Pipeline (by Product), 2011-2013
- Revenue and Net Income of Kingland Pipeline, 2010-2016E
- Revenue and Net Income of Yulong Steel Pipe, 2008-2013
- Revenue Breakdown and Percentage of Yulong Steel Pipe (by Product), 2011-2013
- Operating Revenue Breakdown and Percentage of Yulong Steel Pipe (by Region), 2011-2013
- Gross Margin of Yulong Steel Pipe (by Product), 2010-2013
- Revenue and Net Income of Yulong Steel Pipe, 2010-2016E
- Revenue and Net Income of Shandong Molong, 2008-2013
• Revenue Breakdown and Percentage of Shandong Molong (by Product), 2011-2013
• Operating Revenue Breakdown and Percentage of Shandong Molong (by Region), 2011-2013
• Gross Margin of Shandong Molong (by Product), 2010-2013
• Revenue and Net Income of Shandong Molong, 2010-2016E
• Revenue and Net Income of Tianda Oil Pipe, 2008-2013
• Gross Margin of Tianda Oil Pipe, 2008-2013
• Revenue and Net Income of Tianda Oil Pipe, 2010-2016E
• Main Product Series of Tianjin Pipe
• Revenue and Net Income of Tianjin Pipe, 2008-2013
• Revenue Breakdown and Percentage of Tianjin Pipe (by Product), 2011-2013
• Gross Margin of Tianjin Pipe (by Product), 2010-2013
• Revenue and Net Income of Tianjin Pipe, 2010-2016E
• Revenue and Net Income of Shengli Oil & Gas Pipe, 2008-2013
• Revenue Breakdown and Percentage of Shengli Oil & Gas Pipe (by Product), 2012-2013
• Sales Gross Margin of Shengli Oil & Gas Pipe, 2008-2013
• Revenue and Net Income of Shengli Oil & Gas Pipe, 2010-2016E
• PCK’s Revenue and Net Income, 2008-2013
• PCK’s Revenue Breakdown and Percentage (by Region), 2011-2013
• PCK’s Gross Margin, 2008-2013
• PCK’s Revenue and Net Income of, 2010-2016E
• Key Financial Indicators of Pangang Group Chengdu Steel & Vanadium, 2009-2011
• Operating Revenue and Total Profit of Chengde Steel Pipe, 2007-2009
• Revenue and Pre-tax Profit of Yangzhou Chengde, 2007-2009
• WUXI SEAMLESS OIL PIPE’s Revenue and Net Income, 2008-2013
• WUXI SEAMLESS OIL PIPE’s Gross Margin, 2006-2013
• Revenue of Baoji Petroleum Steel Pipe, 2008-2020E
• China’s Seamless Steel Pipe Apparent Consumption, 2006-2016E
• China’s Welded Pipe Apparent Consumption, 2006-2016E
• China’s Oil Well Pipe Demand, 2009-2016E
You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Choose type of format
PDF (Single user license) ............... 2,250 USD
Hard copy  ................................ 2,400 USD
PDF (Enterprisewide license)......... 3,400 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

<table>
<thead>
<tr>
<th>Title</th>
<th>Format</th>
<th>Cost</th>
</tr>
</thead>
</table>

| Total   |                         |        |
About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- Multi-users market reports
- Database-RICDB
- Custom Research
- Company Search

RICDB (http://www.researchinchina.com/data/database.html), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at:

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828  ●  Fax: +86 10 82601570  ●  www.researchinchina.com  ●  report@researchinchina.com