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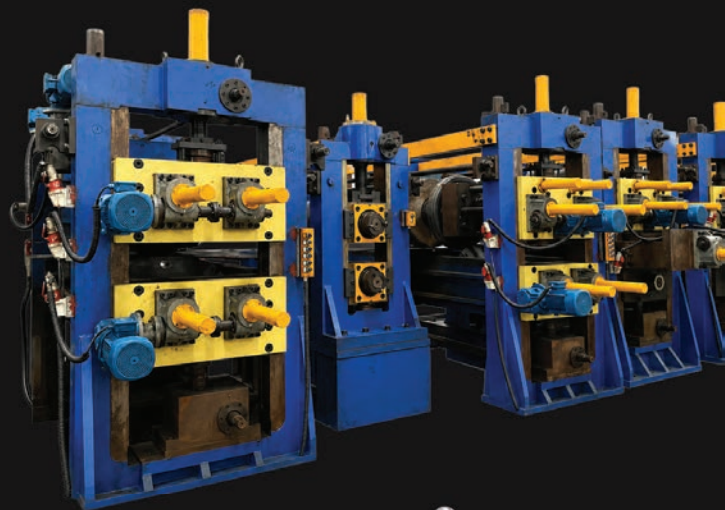
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Dr. Gunther Voswinckel
President ITA

Dear colleagues from the tube and pipe industry, dear readers of the ITAtube Journal,

The year 2025 has once again been a very promising year for our tube and pipe industry. Global production grew by 13%, and large pipes (OD > 16") increased by 37%. Prospects for 2026 and 2027 remain equally encouraging.

At the same time, climate change - particularly the decarbonization of our industry - together with geopolitical challenges is having a lasting impact on the global pipe market. The transformation toward green steel tubes requires substantial investment and innovative technical solutions. New pipe markets have already emerged, including electromobility, carbon capture, and the planned supply logistics for green hydrogen.

These opportunities vary from region to region. Demand has changed, and production costs differ considerably. Political measures therefore need to be assessed in a differentiated manner.

The construction industry is becoming increasingly interesting, with new architectural solutions intensifying the use of tubular products. For plant manufacturers, technology providers, and suppliers, these dynamic times create market opportunities to be seized - along with more innovative approaches to improve productivity and customer benefits, including AI-based technologies.

Geopolitical trouble spots have also strengthened the traditional OCTG business. To compensate for geopolitically risky oil and gas supply sources, production capacities are being expanded in regions such as Asia, North America, and the Middle East, driving strong demand for OCTG pipe products.

The new war in the Middle East between the USA and Iran has created yet another threatening situation. Its consequences must be monitored carefully. Hopefully, this military conflict will be resolved quickly.

It is great to see that Tube China Show 2026 in Shanghai is taking place this September 26. The show - and the China Steel Tube & Pipe Summit alongside - offer an excellent opportunity to intensify customer relationships and to establish new ones, with market developments, innovative products, and production processes presented and discussed with trade visitors from all over the world.

We look forward to meeting you at Tube China in Shanghai.

Yours faithfully

ITA Team

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High Potential Day
Tube Düsseldorf

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increase your visibility
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World Steel Tube Production - Review

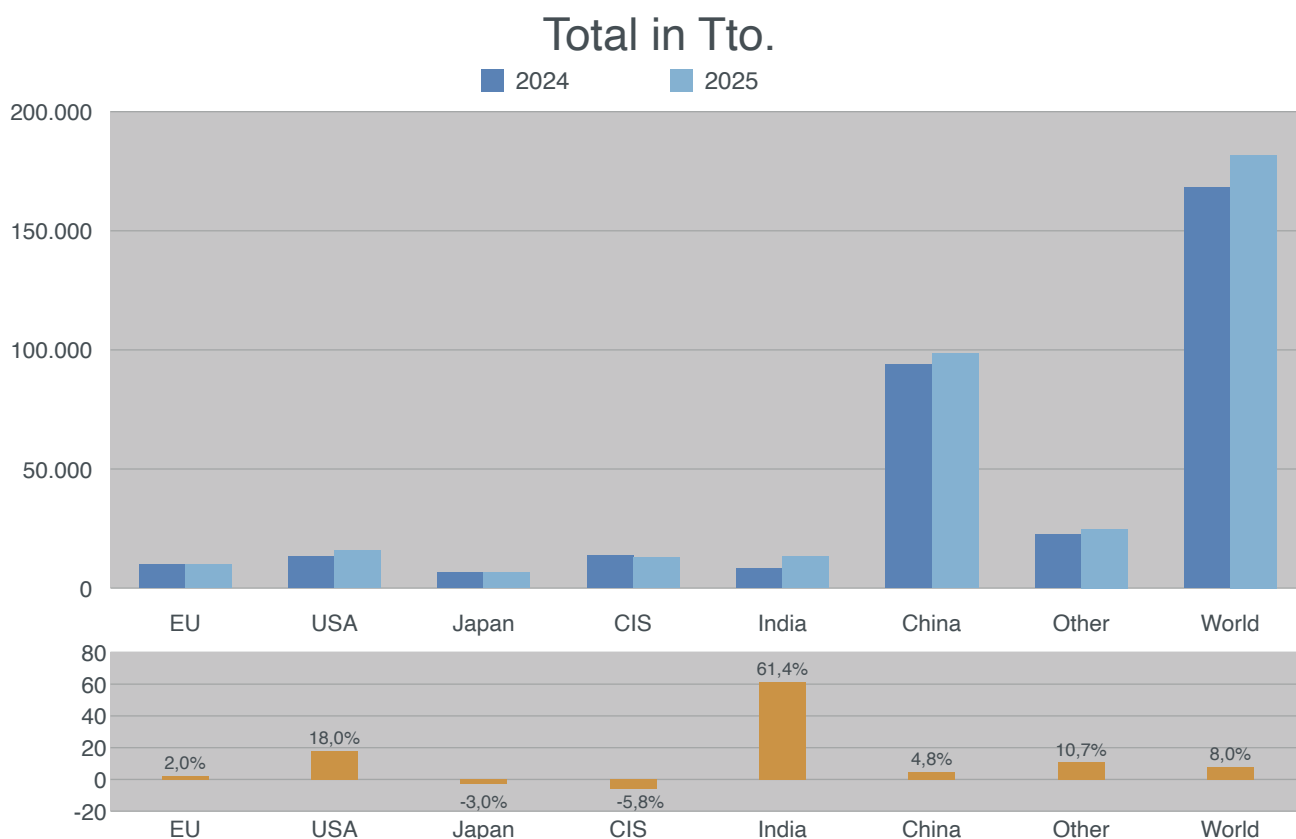
The updated full-year data for 2025 compared with 2024 highlights several notable shifts. By far the most striking development is in India, where total production surged by +61.4% to 13,400 Tto. Particularly remarkable is the increase in welded tubes <406 (+111.1%), accompanied by strong growth in seamless tubes (+26.7%) and welded tubes >406 (+21.9%). This represents an exceptional market development and significantly shapes the overall picture.

The USA also shows strong growth (+18.0% to 15,700 Tto), driven in particular by a sharp rise in welded tubes >406 (+81.3%). China remains a stable growth driver (+4.8%

to 98,500 Tto), with gains across all product segments. Production in the other countries increased by +10.7%, while the EU recorded moderate growth of +2.0%.

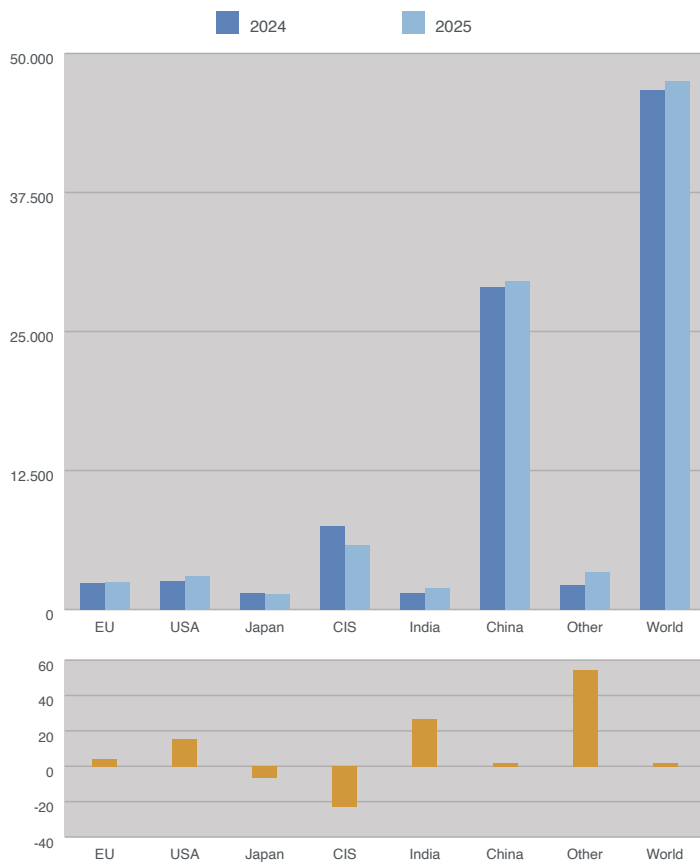
In contrast, the CIS region reported a decline of -5.8%, mainly due to a sharp reduction in seamless tubes. Japan also recorded a decrease of -3.0%, affecting several product segments.

Overall, global steel tube production increased by +8.0% to 181,800 Tto. India, the USA and China were the main drivers of this positive development.

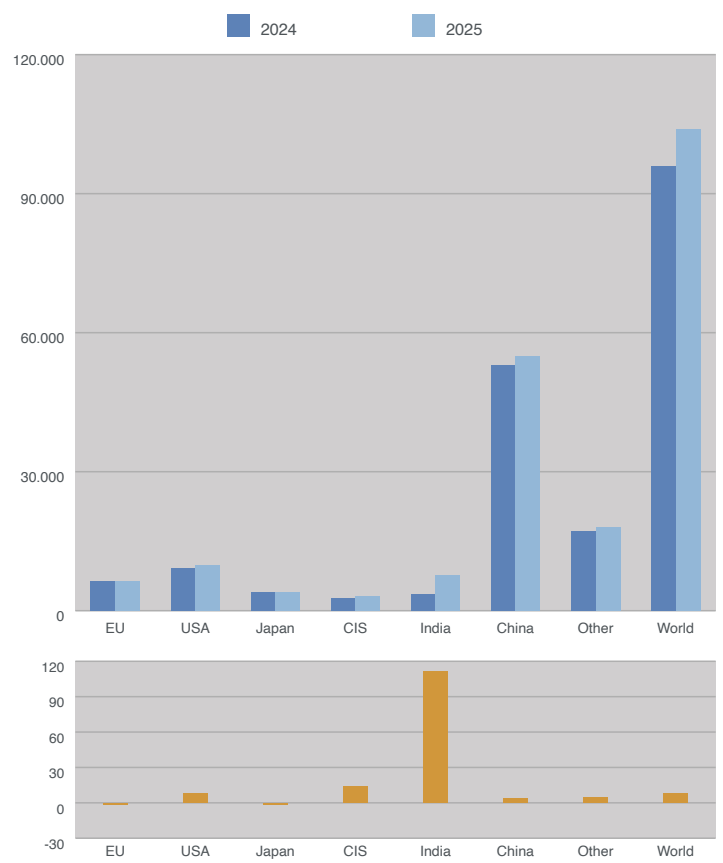


	seamless tubes			welded tubes <406			welded tubes >406			welded tubes			TOTAL		
Country	2024	2025	Change %	2024	2025	Change %	2024	2025	Change %	2024	2025	Change %	2024	2025	Change %
EU	2.400	2.500	4,2	6.400	6.300	-1,6	1.000	1.200	20,0	7.400	7.500	1,4	9.800	10.000	2,0
USA	2.600	3.000	15,4	9.100	9.800	7,7	1.600	2.900	81,3	10.700	12.700	18,7	13.300	15.700	18,0
Japan	1.500	1.400	-6,7	3.900	3.900	0,0	1.300	1.200	-7,7	5.200	5.100	-1,9	6.700	6.500	-3,0
CIS	7.500	5.800	-22,7	2.800	3.200	14,3	3.500	3.900	11,4	6.300	7.200	14,3	13.800	13.000	-5,8
India	1.500	1.900	26,7	3.600	7.600	111,1	3.200	3.900	21,9	6.800	11.500	69,1	8.300	13.400	61,4
China	29.000	29.500	1,7	53.000	55.000	3,8	12.000	14.000	16,7	65.000	69.000	6,2	94.000	98.500	4,8
Other	2.200	3.400	54,5	17.200	18.000	4,7	3.000	3.400	13,3	20.200	21.400	5,9	22.400	24.800	10,7
World	46.700	47.500	1,7	96.000	103.800	8,1	25.600	30.500	-16,1	121.600	134.300	-9,5	168.300	181.800	8,0

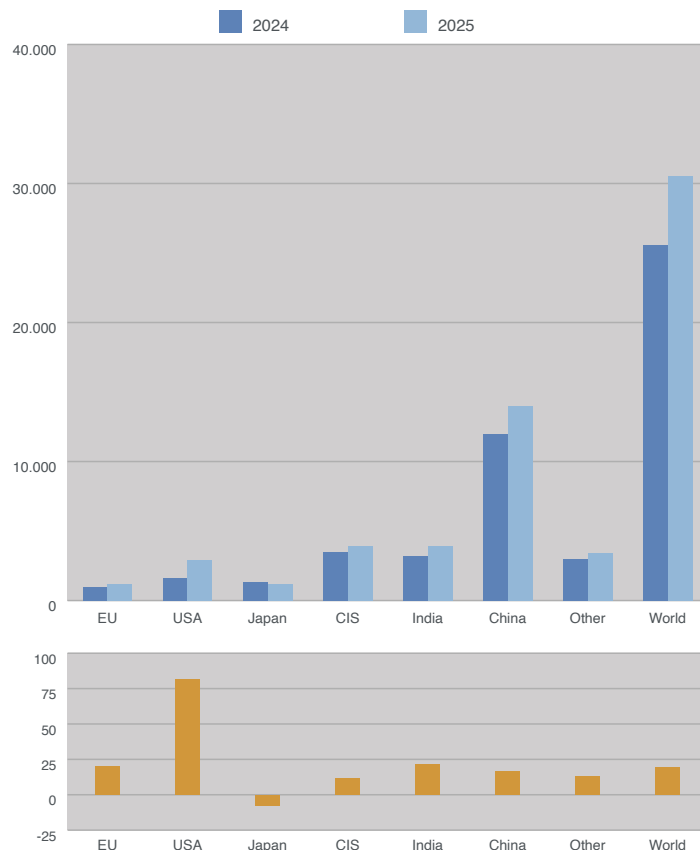
Seamless tubes in Tto.



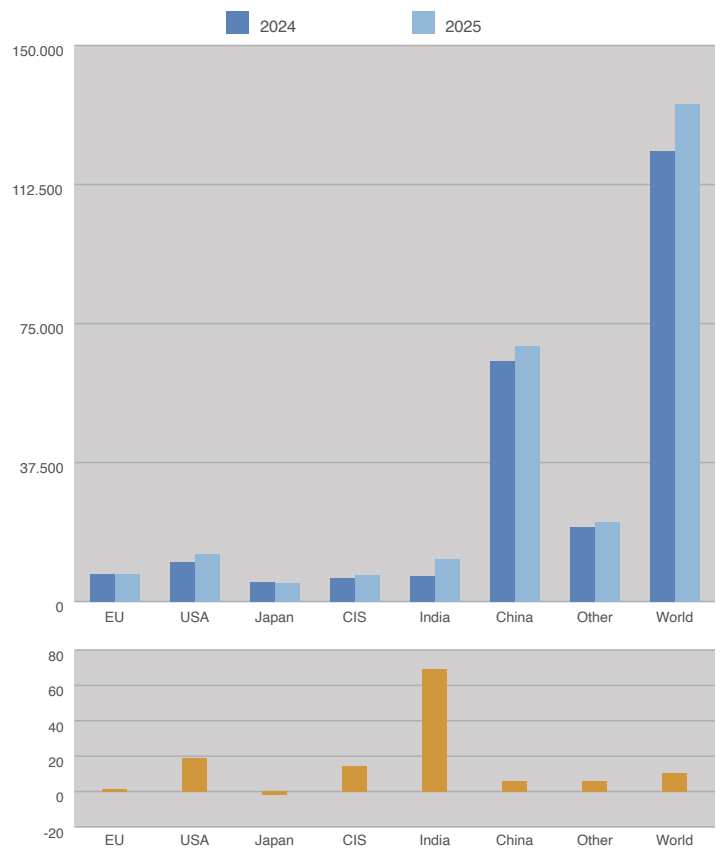
Welded tubes <406 in Tto.



Welded tubes >406 in Tto.



Welded tubes in Tto.



Dr. Gunther Voswinckel, VOSCO GmbH

World Tube & Pipe Market: Factors influencing the current situation

Dr. Gunther Voswinckel – Update as per August 2026

The global tube and pipe market remain strongly driven by the combination of energy affordability, energy-price volatility, and geopolitically induced logistical constraints. For manufacturers, the key issue is not only the level of energy costs (€/MWh) but also the predictability of supply and the impact of grid/tariff policies on total production cost. Electricity prices across selected regions remain highly volatile (roughly 20–170 €/MWh), which can increasingly influence decisions on production location and exposure of energy-intensive steps to high-cost regions. Oil and natural gas continue to be critical determinants for steel tube demand, because it underpins exploration, transport, and many industrial processes despite ongoing decarbonization efforts. Gas pricing in pipeline-connected systems (e.g., Henry Hub in the US) stays comparatively competitive, while regions dependent on LNG face higher input costs and volatility. The renewed and ongoing political conflicts affecting key shipping routes have intensified the price spread between pipeline gas and LNG - reinforcing LNG's role as a short-term balancing fuel rather than a stable cost solution. Long term, this keeps pressure on Europe (and other LNG-dependent regions) to revisit energy strategies, including renewed evaluation of cost-effective pipeline options. On the demand side, production dynamics remain resilient but uneven by region. Global tube and pipe output is estimated to have reached 182 million tons in 2025 (up from 162 million tons in 2024, ~+13%). A notable growth segment is pipeline tubes with OD > 406 mm (16"), reflecting heavy investment in pipeline expansions and rerouting infrastructure to counter political risks, meet shifting logistics and supply requirements.

Regional growth is led by the USA and India, while Europe shows more modest recovery; China continues to account for the largest share of global output and maintains solid growth supported by Middle East-related project activity. Market economics are still shaped by input-cost transmission. Because a large share of production is welded (and therefore linked to hot-rolled coil prices (HRC)) increases in upstream steel feedstocks flow into margins quickly - often faster than downstream tube prices can adjust. In this environment, specialty OCTG grades and corrosion-resistant solutions remain increasingly important, while margin pressure continues to be a structural challenge for many welded producers. Demand pull is broadening beyond traditional oil & gas. The article highlights growing requirements connected to: CCUS expansion, which raises needs for CO₂ pipeline infrastructure and therefore higher-alloyed materials under corrosive conditions. Hydrogen-related infrastructure concepts, including the potential for hydrogen production pathways and hydrogen transport pipelines, creating additional demand for alloyed steel tubes. Automotive mix change, where electrification shifts tube applications away from legacy components (e.g., exhaust-related) toward chassis, suspension, hydroformed structural parts, battery protection structures, and thermal management systems - implying that manufacturers able to deliver high-strength, precision, and EV-specific tubing should outperform commodity-focused suppliers. Mechanical engineering and construction, both expected to remain supportive over the coming decade, with construction increasingly favoring engineered hollow sections and sustainability-linked mate-

rial pathways (e.g., scrap-based EAF routes with green power). Overall, the tube and pipe market outlook for the coming years is best described as structurally supported but operationally risk-sensitive: energy cost differentials, LNG logistics constraints, and ongoing investment in pipeline and infrastructure networks will continue to drive demand and material complexity, while manufacturers must adapt via portfolio strategy, regional production optimization, supply-chain resilience, and value-added capability (especially for corrosion-resistant and precision engineered tube solutions).

As mentioned previously in my articles, the ongoing availability of affordable energy is crucial. We monitor energy costs in selected regions worldwide (see Figure 1).

Electricity price levels vary significantly by region, but what matters for manufacturers is not only the absolute €/MWh, but the predictability of supply and the impact of tariff/grid policies on total production cost. Electricity costs are influenced by geopolitical turbulence, regulations and energy sources. Prices remain volatile, ranging from 20 to 170 €/MWh depending on the country (see Figure 1), reflecting the significant increase over the last 20 years and the subsequent economic uncertainties faced by energy-intensive industries.

Figure 2 shows July 2025 electrical energy prices of selected countries. Europe is experiencing significant price variations and rising costs. Sweden, France and Spain are in a relatively better position than Italy and Germany. Countries with substantial nuclear or other low-cost, base-load energy sources retain cost advantages. For example, electricity costs in Texas, USA, at around 78 €/MWh, are about 20% lower than in many European countries. China, with costs of around 67 €/MWh, is even 35% lower!

Some countries, such as Saudi Arabia, offer electricity at around 40 €/MWh or less. Unfavorable European regulations or grid costs could widen the gap, prompting the relocation of production to regions with lower energy costs. The concentration of energy-intensive industries at the start

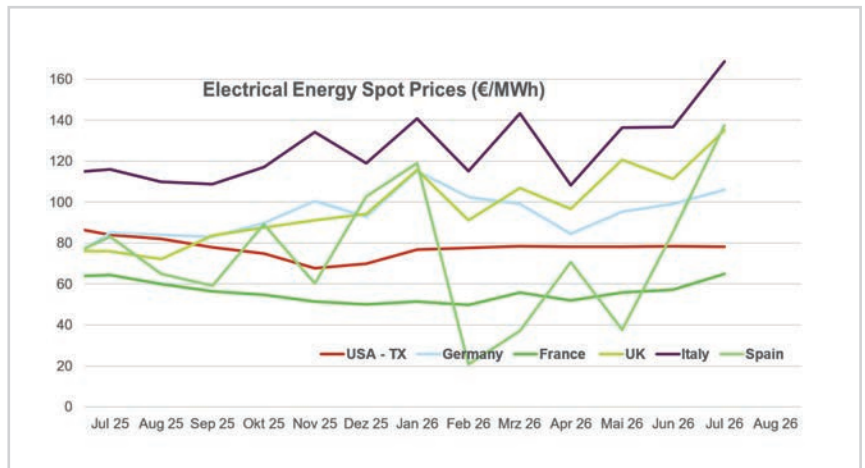


Figure 1: Selected spot prices of industrial electrical energy until July 2026 in €/MWh

Source: Kallanish.com, Statista.com

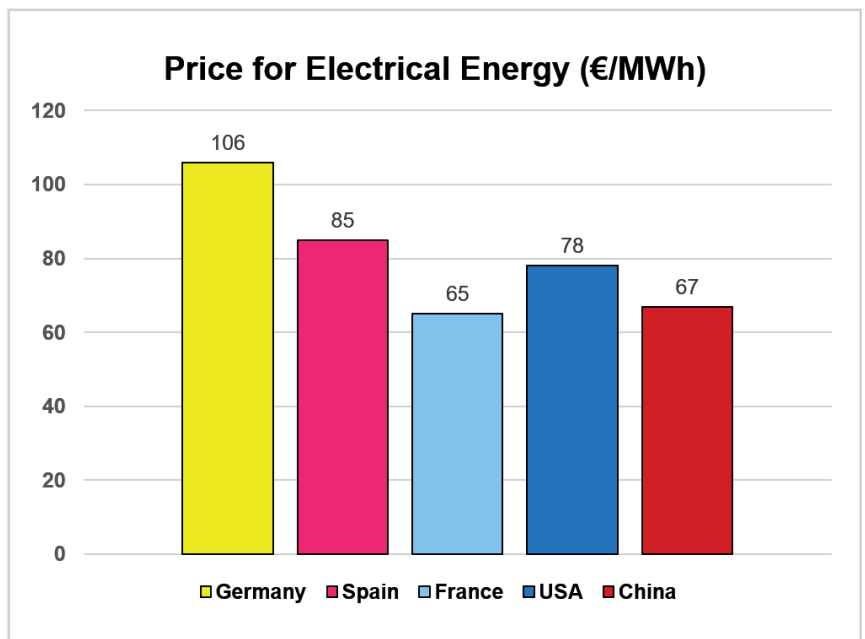


Figure 2: Selected Prices of Industrial Electrical Energy for Companies with a consumption of more than 150 Mio. kWh per year in 2026 in €/MWh.

Source: Kallanish.com, Statista.com (July 2026)

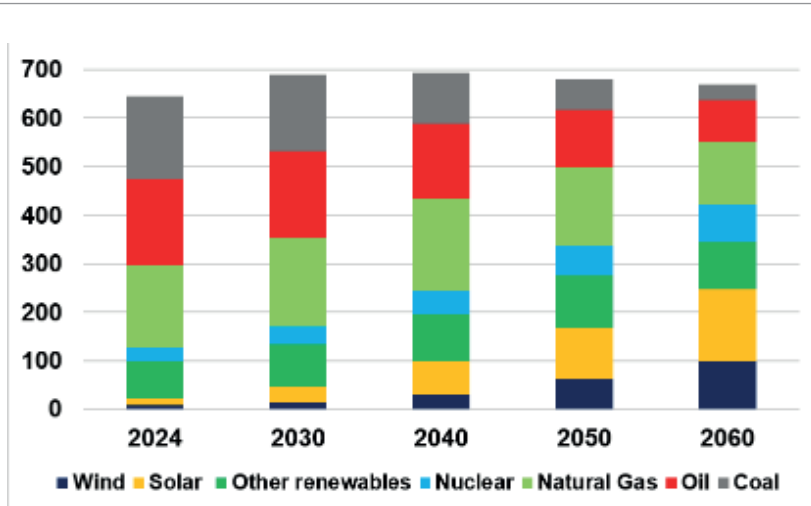


Figure 3: World Primary Energy Supply EJ/Year (1 EJ (Exajoule) = 1 bn. Gigajoule)
Source: DNV Energy Transition 2025, Dr. Büchner

of the production chain could have negative consequences for regions with high electricity costs.

Global electricity supply will peak around 2040. However, for fossil fuels, the peak will be exceeded between 2030 and 2040 (Figure 3).

- Fossil fuels have important uses beyond energy which adds to their staying power. Today, 14% of the world's oil, 10% of the gas, and 1% of the coal is used for feedstock in plastics, petrochemicals, asphalt, and similar products

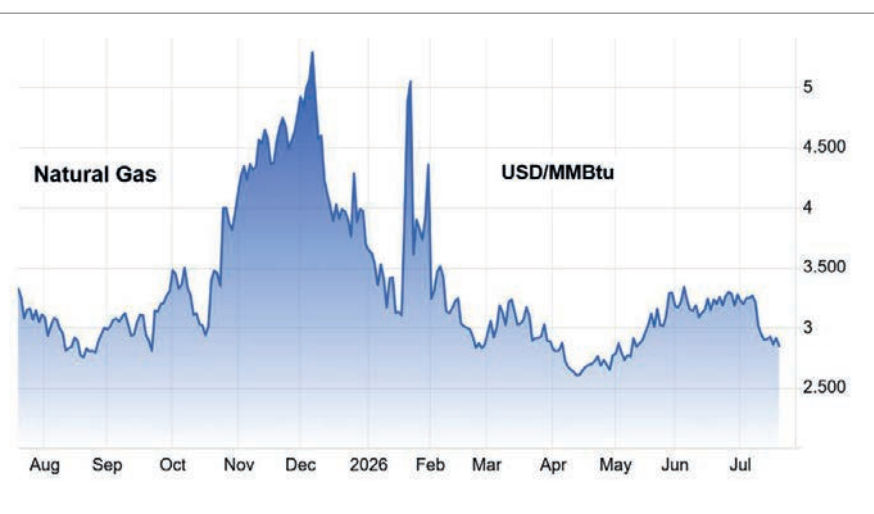


Figure 4: Natural Gas price development as of 20th of July 2026
Source: Trading Economics.com

- For Energy supply as of 2024 fossil fuels still represent about 80% of the feedstock. Oil 27%, gas 26% and coal 27%.
- In 2024 about 15% of the feedstock came from renewables. Wind 1%, solar 2% and others 12%.
- By 2040 energy consumption will peak at an increase by about 8%.
- In 2040 the fossil energy feedstock will be reduced to about 64%. Oil represents 22%, gas 27% and coal only 15%.
- In 2040 about 28% of the feedstock will come from renewables. Wind 4%, solar 10% and others 14%.
- In 2060 the fossil energy feedstock will be reduced to about 38%. Oil 13%, gas 20% and coal only 5%.
- In 2060 about 52% of the feedstock will come from renewables. Wind 15%, solar 22% and others 15%.
- Nuclear power will remain an important base load energy source with a contribution of 4% in 2024, 7% in 2040 and 11% in 2060.
- Solar energy will become the leading energy resource prior to wind and other renewables
- The main disadvantages of solar and wind are variability and storage difficulties. High investment in storage facilities is necessary.
- The use of thermal power plants will remain at a high level prompting good demand for special tubular products.

Natural gas remains a key energy source that influences the steel tube market. Demand for tubes is driven by gas exploration and transportation. Despite efforts to reduce CO₂ emissions, gas remains essential for many industrial processes.

The price of gas at the Henry Hub in the US is very competitive, having declined to around 2,8 USD/MMBtu (equivalent to 8.6 €/MWh) this July (see Figure 4). Despite the recent war between the US/Israel and Iran, the price of natural gas directly from the pipeline has remained relatively low.

Where pipeline supply is constrained, LNG becomes the balancing fuel - raising input

cost volatility for tube making and intensifying regional production shifts. However, a significant increase in price can be seen when comparing the price of LNG-based natural gas received by Europe and Asia since US and Israeli troops attacked Iran on 28 February 2026 (see Figure 5).

Part of the additional cost of LNG arises from processing costs, such as liquefaction at -162°C , transportation by ship and re-evaporation. These processes incur an additional cost of around 8–10 US USD/MMBtu or 24,5–30 USD/MWh (figure 6). However, due to the current blockade of the Strait of Hormuz, LNG cannot currently be transported from Qatar, Saudi Arabia or the United Arab Emirates to Asia or other destinations such as Europe. This just results in a price increase of around 100% to 19,2 USD/MMBtu or 59 USD/MWh — approximately 7 times higher than the price of natural gas transported by pipeline in the US, for example.

Regions such as Europe, which lack adequate connections to international natural gas pipeline networks, are now heavily dependent on LNG. These regions face significantly higher prices for LNG than for pipeline gas.

These additional costs affect regions that cannot access affordable pipeline gas, making LNG a predominantly short-term solution for securing supply. The recently concluded agreement between the US and Europe foresees energy deliveries worth approximately USD 750 billion over three years. In 2024, Europe imported around USD 80 billion worth of energy products from the US, including 36 million tons of LNG and a record 74.5 million tons of crude oil. Tripling such flows will be challenging, given recent negative growth rates. While this agreement strengthens Europe's supply security, it comes at the cost of much higher LNG prices. This is particularly the case if LNG supplies from the Middle East remain difficult.

In the long term, Europe should consider alternative energy sources for the base energy supply, including a renewed evaluation of cost-effective pipeline options.

With production currently standing at around 934 bcm/year, the US is the world's



Figure 5: Natural Gas price TTF from LNG development as of 20th of July 2026

Source: Trading Economics.com



Figure 6: Liquefied Natural Gas (LNG) Import and Regasification Terminal
Source: Commodity Trading Club

largest gas producer and a gas super-power with growth potential. Around 88% of production is accounted for by domestic consumption, with the remaining 12% being exported as LNG.

Russia (with ~702 bcm/year) is the second-largest gas producer and the largest pipeline exporter. However, sanctions and disrupted flows have created a structural disadvantage.

It should be noted that Russia has the largest proven gas reserves, at around 1.688 trillion cubic feet (Tcf), compared to the US's 322.2 Tcf (Figure 7).

Iran and Qatar also hold large reserves. While Qatar is expanding its LNG capacity, Iran's reserves are constrained by sanctions and infrastructure issues. If the war between the US and Iran stands for a longer period and further oil and gas production infrastructure is affected, it may further influence LNG availability and prices.

The European long-term strategy to replace natural gas with green hydrogen is increasingly questioned. Industrial-scale

electrolysis requires substantial amounts of clean water and continuous green electrical power - approximately 55 MW per ton of hydrogen - the process is sensitive to fluctuations in electricity supply, which significantly reduces electrolyze stack lifetimes. As a result, economically viable green hydrogen production is limited to regions with stable and low-cost renewable energy or nuclear power. In most parts of Europe, such conditions are not yet achievable. Exceptions include Norway and Sweden with significant hydropower plants. Hydrogen transport pipelines would create additional demand for alloyed steel tubes.

Some experts, including those from the OECD, advocate producing hydrogen in regions with abundant, low-cost electricity (e.g., the Middle East, North Africa, or parts of Central America). Energy-intensive intermediate products - such as DRI/HBI - could be manufactured near the energy source and then transported to industrial centers such as in Europe or Asia. For the European and Asian metallurgical and tubular industries, the sourcing of DRI/HBI as virgin steel source instead of iron ore and coke would be an interesting economical and logistical alternative. This approach would preserve technological expertise and employment in downstream metallurgical processes. However, these concepts still receive limited political support.

Global tube and pipe production reached 182 million tons in 2025 following 162 million tons in 2024, this represents a 13% recovery (see Figure 8).

Notably, there has been a boom in the production of pipeline tubes with an outer diameter (OD) of over 406 mm (16"). Production of these tubes has increased by 37%, from 22.5 to 31 million tons.

The construction of new pipelines to meet new logistical requirements for redirecting oil and gas to customers at a reasonable cost has created a real boom.

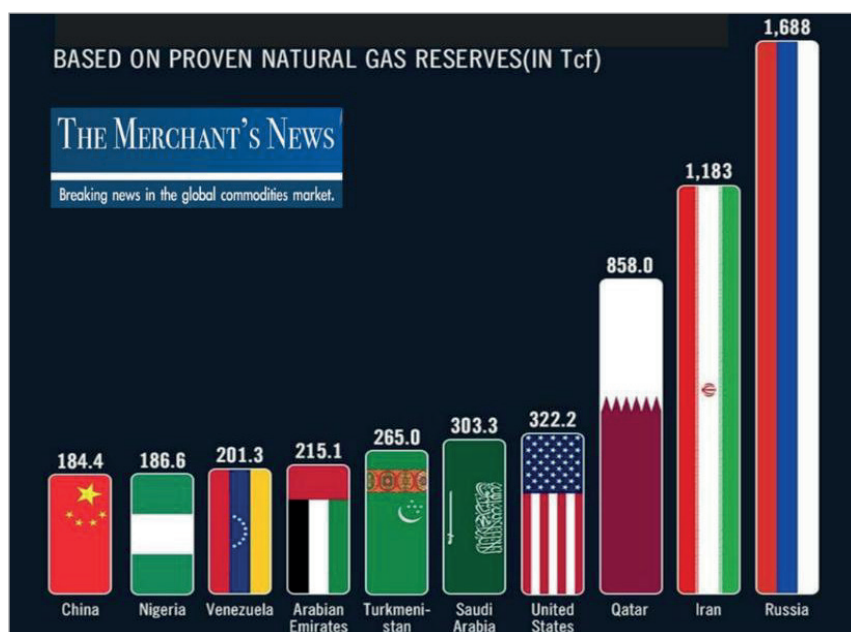


Figure 7: The Top 10 Countries ranked by proven Gas Reserves as per 2025

Source: TheMerchantsNews.substack.com

Regional trends vary significantly (Figure 9):

- **United States:** After a weak year 2024, production increased by 21% in 2025, driven by increased exploration and pipeline projects. Welded tubes smaller than 16" increased by +10%, pipeline tubes larger than 16" increased by remarkable +93%. Most producers are fully booked. Despite tariffs, it is anticipated that only further imports can satisfy US demand. Seamless tube production increased by +15%.
- **India:** Following a good year 2024, 2025 tube production reach an impressive record, with a tube and pipe production increase of +72%. Welded tubes under 16" increased even by +111%. Seamless tube production increased by +46%. Pipeline tube larger 16" OD production increased by +34%.
- **Europe:** Production remains at the low level of 2024, with only +1% growth in 2025. Pipeline tubes measuring over 406 mm in diameter (16") increased by 20%, while seamless production recovered by 4% following earlier cuts. Welded tubes measuring less than 16 inches decreased slightly by -3%.

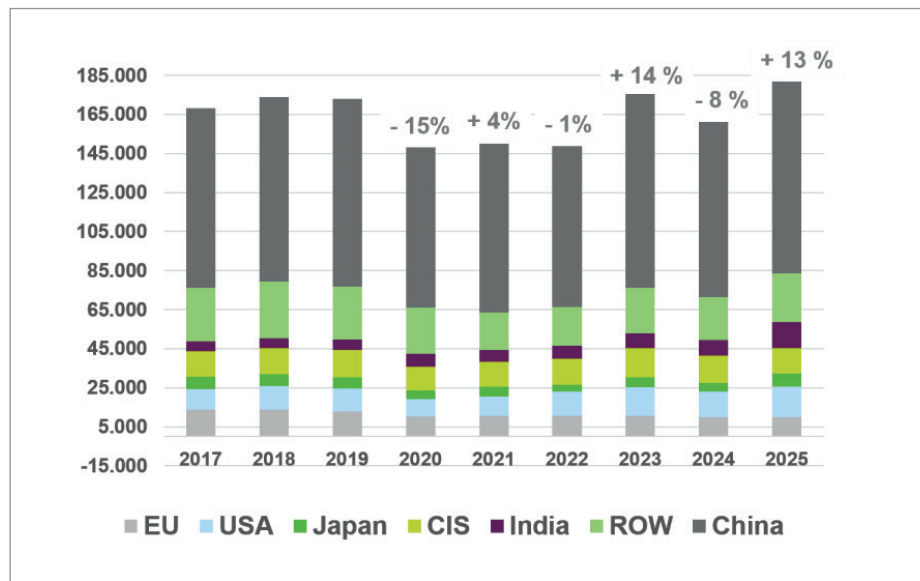


Figure 8: World Tube and Pipe Production 2017 – 2025
Source: Wirtschaftsvereinigung Stahlrohre, ITA

- **CIS:** Total output declined by -8% in 2025. Seamless tubes decreased by -25%. Welded tubes below 16" still on comparably low level increased by +10%. Pipeline tubes increases by +8%.

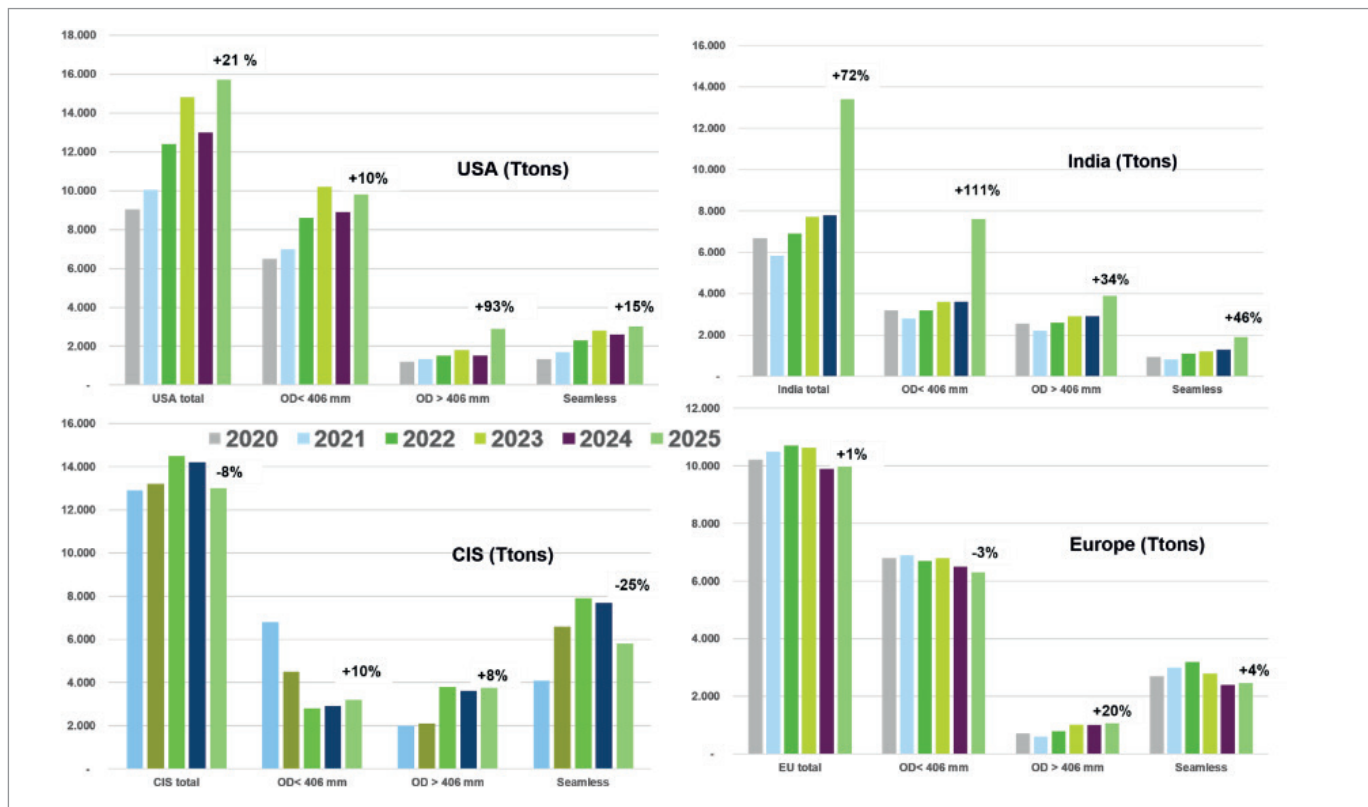


Figure 9: Pipe Production of selected Regions 2020-2025
Source: Wirtschaftsvereinigung Stahlrohre, ITA

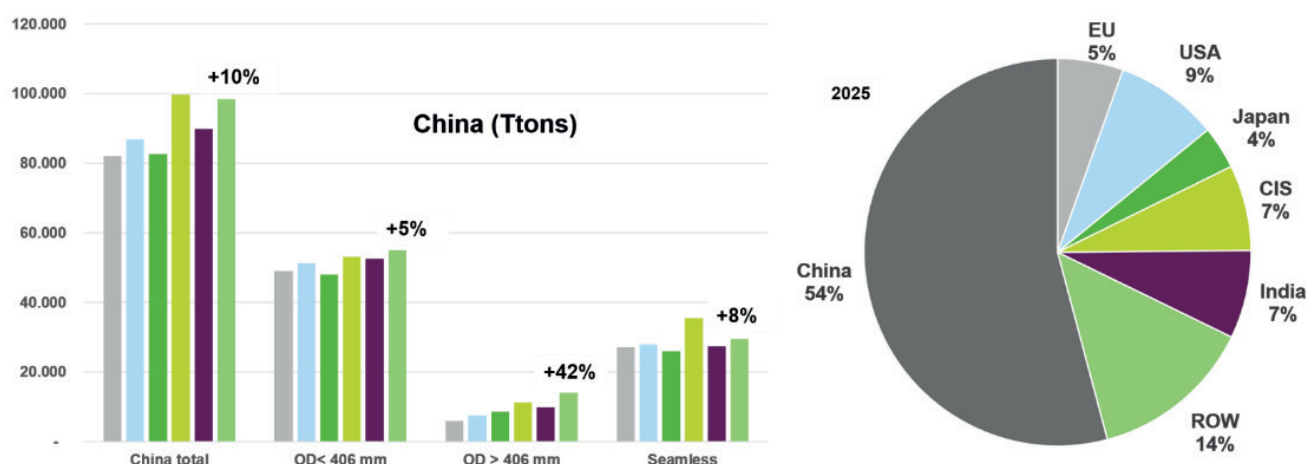


Figure 10: Pipe Production China 2020- 2025 and World Production 2025
Source: Wirtschaftsvereinigung Stahlrohre, ITA

- **China:** Accounting for 54% of global output, China's growth was +10% in 2025 (Figure 10). Pipeline tubes >16" increased by 42%, tubes <16" increased by +5%. Seamless tubes increase by + 8%. Strong activities in the Middle East compensated for U.S. trade restrictions.

Besides the production volume, tube prices are of great importance. The prices for OCTG tubes and structural tubes appear to have significantly increased in 2026.

Figure 11 shows price development for:

- P110 OCTG casing (5.5")
- S235 structural pipe

The P110 prices stabilized in 2025 at about USD 2,000/ton, in 2026, after a week first quarter the prices recovered to about 2.325 USD/ton (+22%).

S235 structural pipe prices started week in 2026 at about 565 USD/ton, but in July 2026 recovered to about 650 USD/ton (+14%), supported by infrastructure projects.

Because a large share of tube production (74% or about 134 million tons in 2025) is welded from hot rolled coil and a small amount of plate, the HRC price cycle is transmitted directly into margins - often faster than the market can reprice tube

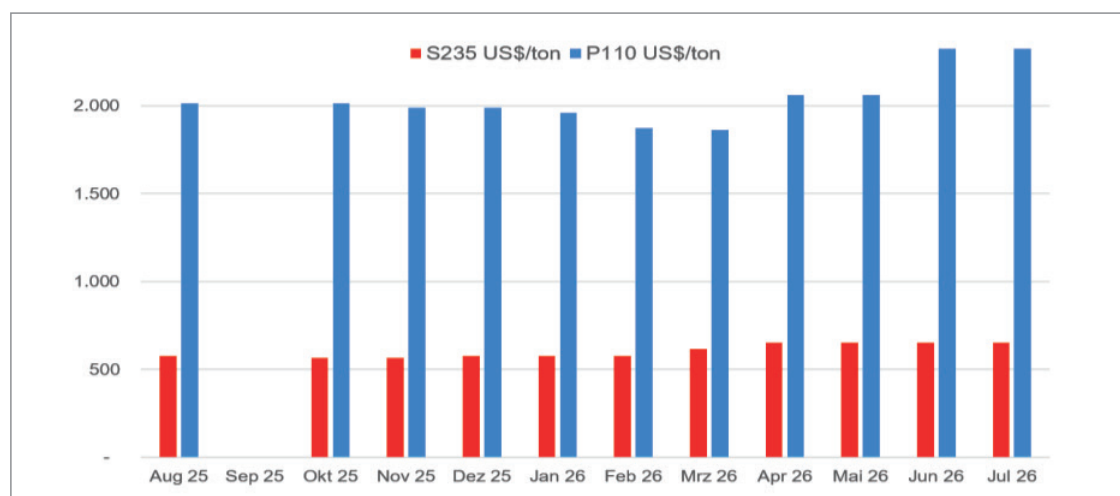


Figure 11: Representative Steel Tube and Pipe Prices (OCTG - P110 USA and Structural S235 Turkey) one year until July 2026
Source: Kallanish.com

offers. US HRC prices rose from about 800 USD/ton in October 2025 to 1.180 USD/ton (+48%) in July 2026 (Figure 12). This means that welded pipe producers in the US are increasingly suffering from deterioration of margins. This also reflects in the production of tubes <16" OD.

In contrast hereto, Turkey (~548 USD/ton +14%) and India (~ 518 USD/ton +13%) trade at significantly lower HRC price levels despite also significantly increased levels (Figure 13). These attractive Indian hot rolled coil prices are a reason for the significant boom of tubes <16" in India.

Narrow margins in welded tube production remain a structural challenge. Specialty grades for OCTG are increasingly expensive and difficult to source.

The oil and gas sector accounts for around 51% of the global demand for tubes and pipes. Consumption of OCTG correlates strongly with oil prices (see Figure 14). The oil price is significantly affected by the conflict between the US and Iran. Since 28th of February 2026, the oil price has jumped from around 60 USD/Bbl to 100 USD/Bbl (+67%). Indications about a peaceful end to the conflict dropped the price again to about 70 USD/Bbl early July 26. Since the conflict restarted on the 8th of July, the oil price reacted immediately with nervous reactions raising up to 93 USD/Bbl in only



Figure 12: Hot-Rolled Coil Steel prices 1 Year until July 2026
Source: tradingeconomics.com

a few days. Fears about the oil supply are again driving the price up. These nervous reactions reflect uncertainty about the duration of the conflict and the extent to which exploration, processing and logistical infrastructure may be affected by bombing. Particularly that Iran troops have taken control of the Strait of Hormuz creates great concerns to the world. Many industries that depend on moderate oil prices are suffering. Everyone hopes that Middle Eastern oil exploration sites and refineries will not be further affected, and that the Strait of Hormuz will soon reopen.

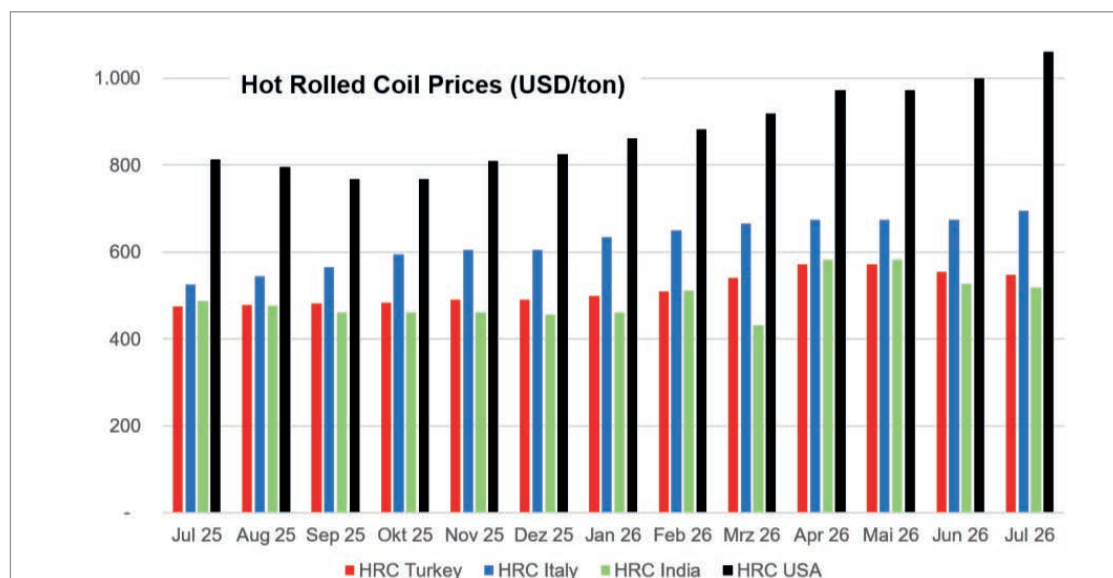


Figure 13: Hot-Rolled Coil Steel prices for selected countries until July 2026
Source: Kallanish.com



Figure 14: Oil price WTI crude development 1 month up to July 2026 (US\$/Bbl.)
Source: OilPrice.com

The US Energy Information Administration (EIA) reports a record high of 13.7 million barrels per day (Bbl/d) for May 2026, and forecasts 13.3 million Bbl/d for 2027. At the same time the US gas production was about 139 Mio. MMBtu/d.

US oil and gas product exports reached a further record high of 5,7 million barrels per day of oil and 17 Mio. MMBtu of gas in Mai 2026.

According to Oilprice.com, the number of US oil rigs has been enlarged, increasing from 412 in December 2025 to 451 as of 31st of July 2026. The number of gas rigs was almost stable from 125 to 127 during the same period, driven mainly by shale

gas. We have noted a significant increase in output per rig, which is due to improved rig productivity. US policy continues to prioritize fossil fuels and nuclear energy, with reduced focus on wind and solar power. The potential effects of a prolonged Iranian war and further damage to oil and gas infrastructure must be closely monitored.

Meanwhile, the expected global oil demand for 2026 is rising moderately to 105 million bpd, driven mainly by Asia and emerging markets.

Demand for tubular products will remain strong as concerns about energy security persist.

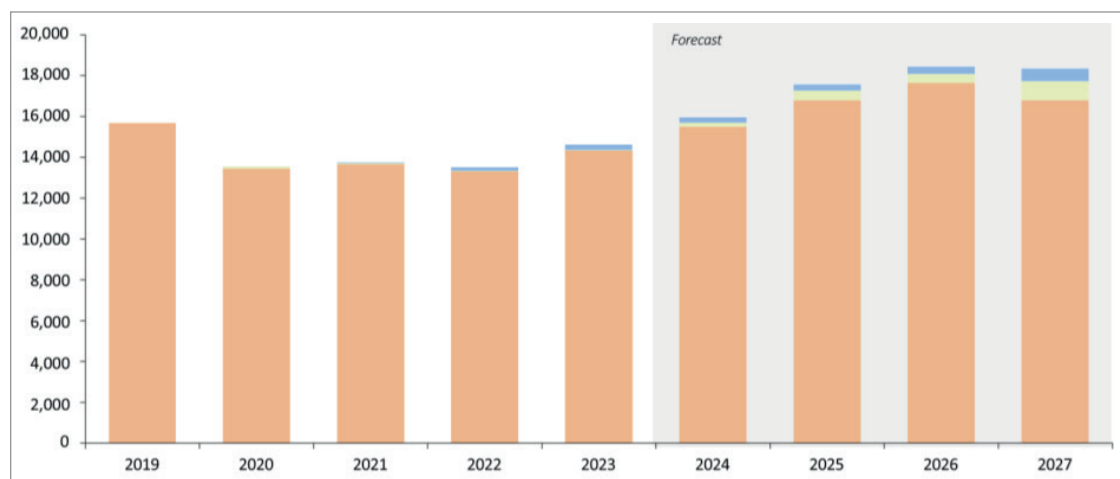


Figure 15: The Global Demand for Line pipe Market 2019-2027 (million tons)
Source: Rystad Energy

The increased productivity of oil and gas rigs, as well as horizontal drilling technology for shale gas, requires many tubular products and creates an increased technological demand for the tubes and joints used for exploration. Corrosion and wear continue to affect the performance of OCTG, particularly in H_2S/CO_2 -rich environments. So-called sour gas alloys are widely used. There is also rising demand for tubular products made from corrosion-resistant alloys (CRAs) and clad materials, which offer manufacturers opportunities for differentiation.

Substantial investments in oil and gas transport networks are required due to geopolitical and economic developments. The ban on Russian natural gas, the cost disadvantage of LNG, and the shale gas boom in the US have resulted in many pipeline projects and increased demand for pipes (Figure 15).

In addition, the Iran conflict and in consequence the restrictions to transport oil and gas via Strait of Hormuz and increasingly passing Bab el-Mandeb at Yemen (Figure 16). Several new pipeline projects are planned to overcome such political risks.

The enormous rise in demand for pipes larger 16" in 2025 confirms this development. Particularly India, US, China and Europe are benefitting (Figure 17). Not only LSAW Pipes (Longitudinal Submerged Welded Pipes) produced from steel plates are experiencing substantial demand in 2026 and 2027, but also HSAW Pipes



Figure 16: Logistic Challenges in Middle East due to the Iran/US conflict
Source: Rystad Energy

(Helical Submerged Welded Pipes) see a demand boom in 2026 and 2027. HSAW Pipes where applicable are significantly more reasonable in price since they are spiral welded from hot steel strip.

With Carbon Capture, Utilization and Storage (CCUS), this new market, requiring extensive pipeline infrastructure, is emerging too. CO_2 transport demands higher-alloyed materials due to corrosive conditions. Developing CO_2 pipeline networks will be essential for large-scale deployment and cost reduction, although challenges remain in permitting, investment, and public acceptance. Adoption is

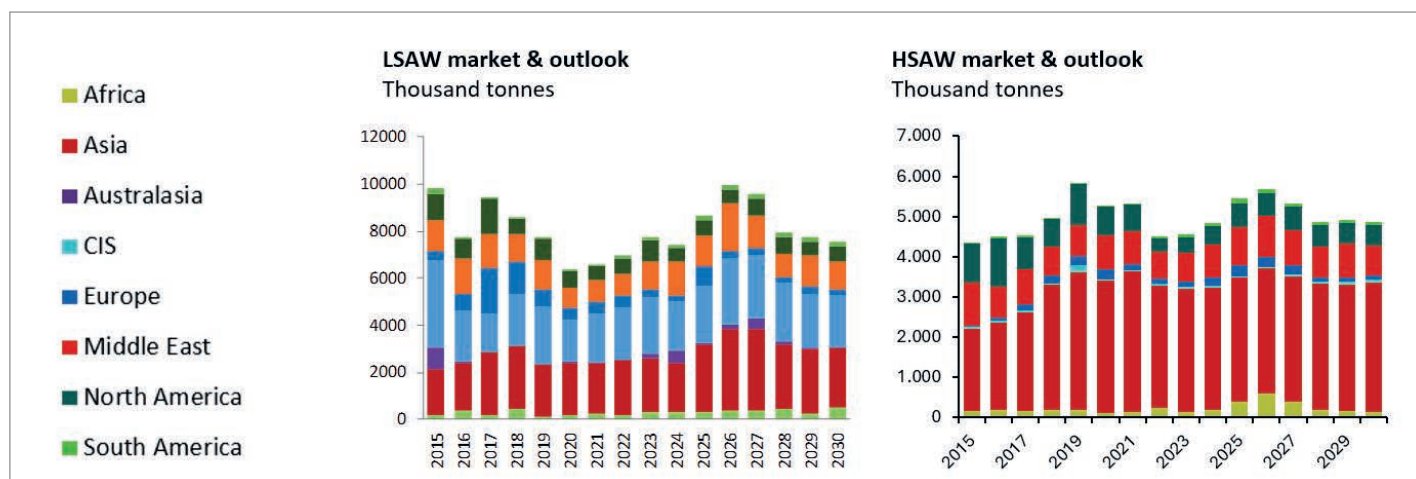


Figure 17: The Global Line Pipe Market 2015-2030 for LSAW and HSAW (Mio. tons)
Source: Rystad Energy

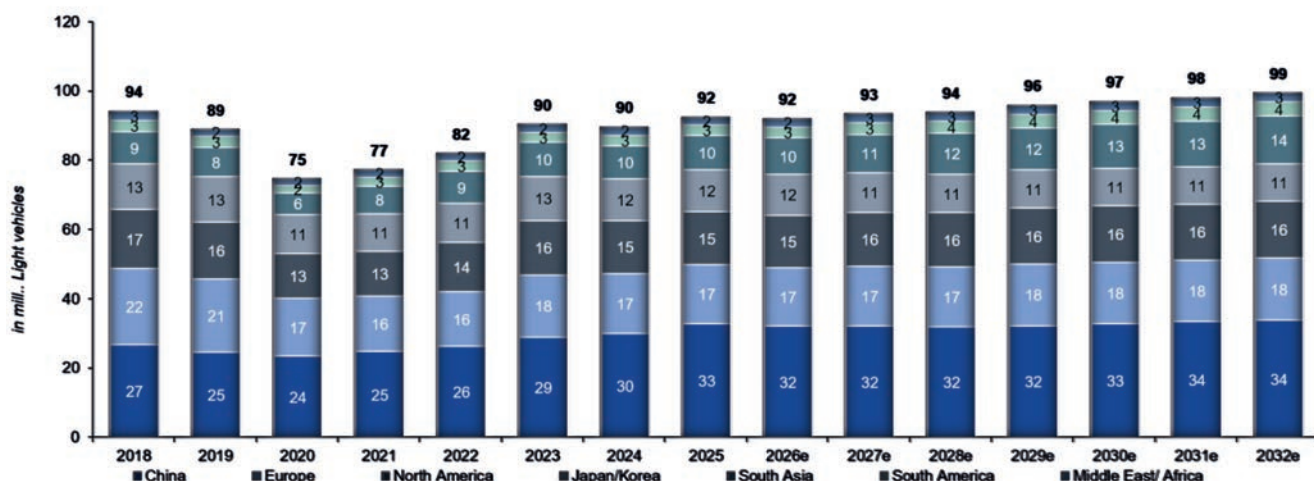


Figure 18: Global Production of Automotive Light Vehicles 2018-2032 (million units)
Source: HIS, Buechner (March 2026)

increasing in the U.S., the Middle East, and beyond.

The automotive sector accounts for around 15% of the global demand for tubes. According to HIS, global light-vehicle production increased to 92 million units in 2025, a level which is expected to be maintained in 2026 (Figure 18). 2027 and the following years will see further moderate growth while competition, electrification and regional shifts reshape the automotive industry.

Higher US tariffs and supply chain disruptions are rising manufacturing costs. However, Battery-Electric Vehicles (BEVs) had a strong year 2025, with around 13.7 million units, dominated by China. PwC expects the BEV market to grow by ~210% to 28.8 million units by the year 2030. It is forecast that the Chinese production share of the global BEV market will lose some of its dominance. Its market share is expected to fall from 66% to around 54% by 2030.

Steel tubes will remain an important material in light vehicles after 2026, but their application is shifting rather than simply growing or shrinking. The transition to electric vehicles (EVs), lightweight design, and stricter safety requirements are changing where and how tubes are used.

For steel tube manufacturers, the key challenge is not a collapse in demand but

a change in product mix:

Declining segments: exhaust tubes, fuel lines, engine and transmission tubes.

Growing segments: chassis, suspension, hydroformed structural tubes, battery protection structures, and thermal management systems.

Companies that can supply high-strength, precision, hydroformed, and EV-specific tube solutions are expected to outperform suppliers focused primarily on traditional internal combustion engine applications.

Mechanical engineering accounts for around 9% of global tube production (Figure 19). Market volume is expected to grow from USD 3.6 billion in 2025 to USD 5 billion in 2030, mainly driven by China, India, the USA, and the Middle East. Industrialization is the driving factor.

The global mechanical engineering market is expected to remain one of the most attractive end-use sectors for steel tube manufacturers over the next decade. Unlike the automotive industry, where electrification reduces demand for some tube applications, mechanical engineering is becoming more tube-intensive, driven by automation, industrial investment, renewable energy, and demand for high-performance machinery.

The global mechanical engineering sector is expected to grow by approximately

3 –5% annually through 2030, with the strongest expansion in Asia, India, South-east Asia, and selected North American industries. Precision steel tubes used in mechanical engineering are projected to grow even faster, at around 5% CAGR through 2033, reflecting increasing demand for high-value engineered products.

The mechanical engineering sector is expected to become one of the most attractive markets for precision and seamless steel tubes after 2026. Growth will be driven less by volume and more by high-value, engineered tube products used in automation, hydraulics, industrial machinery, renewable energy systems, and advanced manufacturing. Manufacturers that invest in precision production, high-strength materials, and value-added processing are likely to outperform suppliers focused on commodity tubing. The intersection of mechanical design with software and electrical systems is creating a new generation of machinery.

Current trade wars, tariff escalations and political conflicts are disrupting international project supply chains and creating uncertainty for cross-border engineering assignments. Engineering firms with international operations must constantly adapt to changing political environments and regulatory restrictions. For example, the US is currently experiencing significant supply restrictions, resulting in a 3.7% contraction in production volumes, despite its general growth patterns.

Another constraint is talent shortages and skills gaps. Competition for talents can drive up labor costs and limit growth for firms unable to attract and retain skilled professionals.

Construction represents about 5% of tube demand. According to GlobalNewswire (January 2026), the global construction market will account to USD 17.26 trillion in 2026 and is expected to exceed USD 21.73 trillion by 2030. This represents an annual growth rate of about 5,9% (Figure 20) driven by:

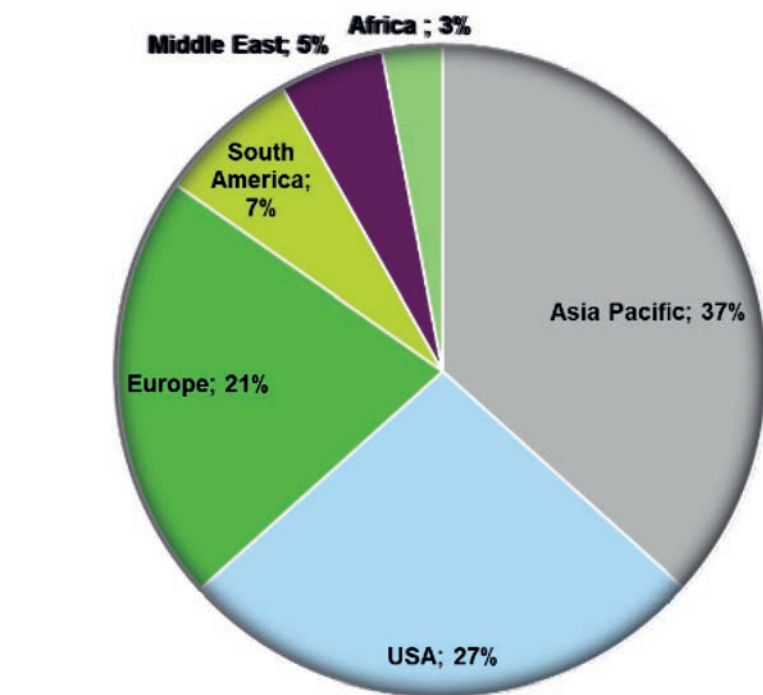


Figure 19: Global Mechanical Engineering Regional Market Share
Source: BusinessDojo

- Urbanisation in Asia and Africa
- Infrastructure modernization in North America and Europe
- Data centres and logistics facilities
- Renewable energy projects
- Residential housing demand in emerging economies

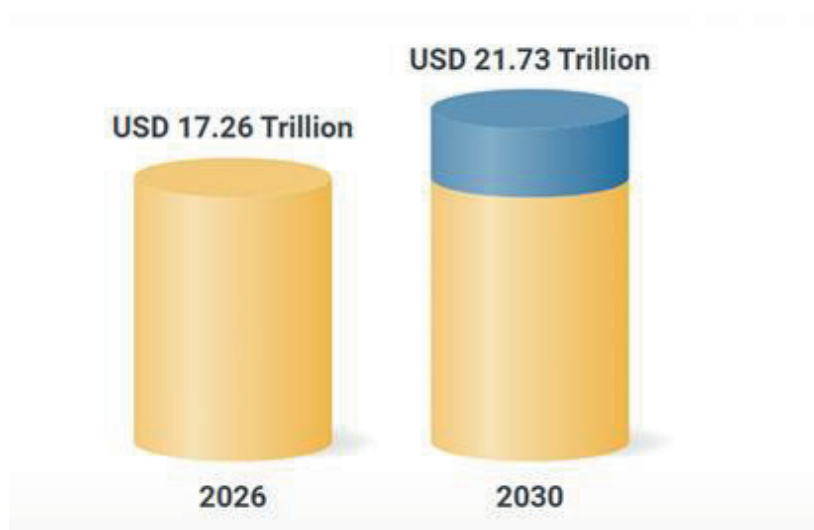


Figure 20: Global Construction Market Forecast 2026-2030 (Trillion US\$)
Source: ResearchandMarkets.com

Asia-Pacific will remain the largest construction market, accounting for more than half of global construction activity.

Anyhow the short-term growth is expected to be slow, whereas the later growth will accelerate.

The global construction industry will become one of the strongest growth markets for steel tube products after 2026. Construction is creating new and expanding applications for structural steel tubes, particularly in infrastructure, high-rise buildings, modular construction, and renewable energy projects. The use of steel tubes is shifting from conventional structural applications toward engineered hollow structural sections (HSS) and high-strength tubular solutions.

Steel tubular structures are increasingly preferred because they offer:

- High load-bearing capacity
- Reduced structural weight
- Faster construction
- Better earthquake resistance
- Greater architectural flexibility

For steel tube manufacturers, the greatest opportunities will lie in:

- High-strength structural hollow sections
- Galvanized and corrosion-resistant tubes
- Large welded structural tubes
- Precision tubes for modular construction
- Tubular solutions for sustainable and climate-resilient infrastructure

Overall, the construction market offers high long-term growth potential and is likely to become one of the key drivers of global demand for structural steel tube products.

The tube industry must promote the advantages of tubular profiles, including flexible geometry, high mechanical performance, smooth surfaces, and suitability for long spans. Alloyed steels may offer additional benefits. From a sustainability perspective, tubes produced from scrap in EAFs using green power significantly reduce carbon footprint. Additional capacity is particularly needed in India to meet growing demand.

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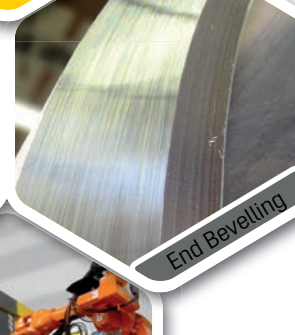


Tube Cut-Off

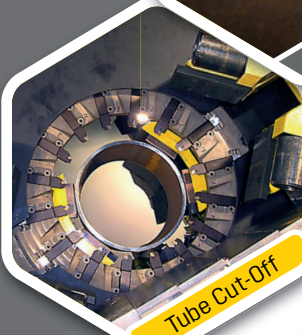


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Tube China

Interview with Evian Gu – General Manager of Messe Düsseldorf in China



Evian Gu has served as General Manager of Messe Düsseldorf in China since August 1, 2024, overseeing the subsidiaries Messe Düsseldorf Shanghai and Messe Düsseldorf China. She manages key industrial exhibitions such as wire China and Tube China, alongside other major flagship events.

ITA: *For the past several years, Tube China in Shanghai has become an ideal location for the Chinese tube industry to meet. How many exhibitors from which parts of the world will present their products and latest technologies on the show? What is the increase in scale compared to the last edition?*

Answer:

First launched in Shanghai back in 2004, Tube China is an official edition of the global Tube Worldwide exhibition series. Over its 22 years of development, this biennial show has cemented its position as Asia's premier trade fair dedicated to the tube and pipe industry.

For the 2026 edition hosted at Shanghai New International Expo Centre, we anticipate over 400 leading exhibitors worldwide showcasing their latest products and cutting-edge technologies across a total exhibition space of 35,000 sqm.

Compared with Tube China 2024, the overall scale of the 2026 show will grow by 22%.

The international exhibitor roster boasts strong participation from key manufacturing markets, including Germany, Italy, Finland, Switzerland, France, the United States, Norway, India, South Korea and Japan.

ITA: *China accounts for 56% of global pipe-work production this year, even as export pressure mounts in the US and, increasingly, in Europe. How is that shift visible on the trade fair floor – and where do you see the market heading from here?*

Answer: Against the backdrop that China contributes 56% of the world's total tubular output, Chinese pipe manufacturers are seeing rising exports to the US and

a growing number of European destinations. This industry shift can be clearly observed across all exhibition zones of Tube China 2026.

Although Chinese steel pipe enterprises face varying trade challenges in European and American markets, domestic manufacturers' enthusiasm for participating in Tube China keeps climbing. To date, more than 400 Chinese companies have confirmed their booths, making up 93% of all exhibitors. The strong domestic turnout reflects robust demand for tubular products driven by China's new infrastructure initiatives, including 5G base stations, data centers and ultra-high voltage power transmission projects.

The exhibits on display further mirror China's industrial upgrading amid surging global exports. Driven by national key technological breakthroughs in nuclear power, deep-sea oil & gas exploitation and hydrogen energy sectors, high-end steel pipe products have achieved remarkable localized production. Top domestic manufacturers such as Tianjin Youfa, Hengyang Valin, Tianjin United Steel and Tianjin Yuantai Derun Pipe will showcase their cutting-edge products and proprietary technologies at the show, highlighting China's leading manufacturing strengths in the global tubular industry.

Looking ahead to market prospects, two major growth engines will fuel Chinese steel pipe exports in the coming years. The first is oil and gas resource development projects across the Middle East; the second is large-scale infrastructure construction within ASEAN nations. Meanwhile, pre-registration data for professional buyers has reflected widespread global interest in Chinese tubular products. We have received registrations from purchasing delegations spanning India, Türkiye, Egypt, Indonesia, South Korea, the US, the UAE, Mexico, Brazil and numerous other markets.

Backed by the world's largest pipe production capacity, Made-in-China tubular goods are drawing increasing attention from emerging economies worldwide. As

for mature markets in Europe and the US, despite current trade frictions, Chinese manufacturers will continue advancing high-value, green and intelligent tubular solutions to tap new market opportunities in these regions.

ITA: What are the long-term prospects for the tube industry in China, particularly with regard to sustainability and technological trends. What role does Tube China play in this transformation process?

Answer: The Chinese tube industry is moving towards a more environmentally friendly, intelligent, and efficient future, driven by the deep integration of digital technologies, the growing use of lightweight materials, and the adoption of green and low-carbon solutions.

The development goal of China's tube industry is to further enhance its capabilities in resource security, independent innovation, and international competition by 2030. The industry aims to achieve world-leading levels in technological equipment, quality and branding, digital transformation, and green and low-carbon development. It strives to fully establish a modern steel industry system with significant global influence, strong industrial independence, and high development contribution.

From the perspective of long-term export potential, the deepening of international cooperation under the Belt and Road Initiative and green energy projects will drive the upgrading of the export structure. The coordinated growth trend of welded pipes and seamless pipes will continue. It is expected that China's high-end steel pipes will have a higher potential for market share increase in the global market in the coming years.

Tube China plays a key role in this transformation. As Asia's leading platform of the tube and pipe industry, it showcases innovations across the entire value chain, from material development to advanced processing, and hosts forums that facilitate industry dialogue on sustainability and technological advancement.

ITA: What are the key themes of this year's conference, particularly with regard to the impact of current economic developments in Asia, the global market as well as technological trends?

Answer: The concurrent events at Tube China 2026 include: 3rd China International Steel Tube & Pipe Summit, the Green Automotive and Tube Technology Innovation Forum, the Seminar on Application of Tube Products & Technologies in the Marine Industry, etc. These sessions focus on topics such as situation and trend of global tube market analysis, carbon peaking, digital and intelligent manufacturing, as well as technological innovation within the tube sector, aiming to foster international cooperation and address industry challenges.

ITA: The organisers of Tube China have always created an exceptional environment in which the industry can network, exchange ideas and build strong business relationships. What exciting new features or special highlights can you highlight that attendees can look forward to this year, and which should definitely motivate them to take part in this inspiring event?

Answer: Tube China 2026 will launch the brand-new "Nonferrous Metals & High Performance Alloy Materials China", alongside upgraded Thermprocess China and Saw & Laser Cutting China. Together, they offer comprehensive solutions spanning material innovation to advanced processing technologies.

Attendees can enjoy an enhanced Business Matchmaking Program, which facilitates one-on-one supplier meetings. Group visitors, especially those from the Yangtze River Delta region, will benefit

from fast-track entry, VIP services, exclusive gift packages, and complimentary shuttle services for larger groups.

A new thematic award program has also been introduced. It features three award categories that recognize outstanding innovation, green development, and digital intelligence transformation in the tube industry. Exhibitors can submit their company and product information to compete for these honors. This interactive element adds an engaging dimension to the show.

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Tube China

3rd China International Steel and Pipe Conference – 22 Sept 2026

Monday, September 21, 2026		
10:00-18:00	Conference Registration	
Tuesday, September 22, 2026 – Fuyue Ballroom, Shanghai Fuyue Hotel		
	Topic	Speaker
09:00-09:30	Opening Remarks	Jiang Wei, VP and Secretary-General, China Iron and Steel Association Li Maojin, Chairperson of the Welded Pipe Branch, CISA Luo Yuandong, Vice Chairman and President, CITIC Pacific Special Steel Group Co., Ltd. Gao Bo, Co-Chairman and President of Shanghai Ganglian E-Commerce Co., Ltd.
09:30-10:10	The Current Situation and Trends of Green Development in the Steel Industry	Feng Chao, Deputy Secretary-General of the China Iron and Steel Association
10:10-10:40	Global Pipe and Tube Market: Situation and Trends	Dr. Gunther Voswinckel, President, International Tube Association (ITA)
10:40-11:20	Tenaris: Corporate Overview and Outlook on the Global Steel Tube Industry	Wang Peng, Senior Manager of Institutional Relations, Tenaris China
11:20-12:00	Iterative Development and Outlook of High-end Steel Pipe Varieties	Zhuang Gang, Senior Advisor of Sub-association for Steel Tube and Pipe Products, China Steel Construction Society
12:00-13:30 Buffet Lunch		
14:00-14:10	Industry Standard JB/T15425-2026 Steel Strip Automatic Strapping Machine-Launch and Unveiling Ceremony	Chen Runjie, Secretary-General of Packaging Machinery.
14:10-14:40	R&D and Engineering of Domestic High-Temp Materials for 650°C High-Efficiency Coal-Fired Power Units	Li Pei, Senior Engineer, Xi'an Thermal Power Research Institute Co., Ltd.
14:40-15:10	Process and Technology Innovation of the Extra-Large Diameter Continuous Seamless Tube Rolling Mill at Hengyang Steel Pipe	Wang Zhifeng, Sales Director, Danieli Centro Tube
15:10-15:40	Application of Machine Vision Technology in Automatic Flushing of Tube Holes in Steel Tube Pickling Lines	Tang Haijun, Technical Dept Manager of Sicolinx Control Systems (Shanghai) Co., Ltd.
15:40-16:10	Mysteel Industry Big Data Sharing and Market Analysis	Dai Zhengdong, Steel Pipe Analyst, Shanghai Ganglian
16:10-16:40	Export Business Experience Sharing for Welded Pipe Manufacturers	Li Xiang, GM, Tianjin Youfa International Trade Co., Ltd.
16:40-17:10	Global OCTG Trend Outlook	Luo Yichuan, China Research Director, Rystad Energy
17:10-17:40	Legal Risks and Prevention for Manufacturers' Overseas Investment	Jia Ping, Partner, Beijing Zhongzi Law Firm
Wednesday, September 23, 2026		
10:00-16:00	Visit to the 2026 International Tube Exhibition	

Conference 22 Sept 2026

The steel pipe industry is currently navigating complex challenges, from volatile demand to stringent performance requirements in downstream sectors. Experts will discuss how to respond to these developments at the 3rd China International Steel Tube & Pipe Conference on 22 September 2026.

The event will take place at the Shanghai Fuyue Hotel.

Key Focus Areas of the Programme:

- **Market Dynamics:** In-depth analysis of the global tube and pipe market, investment climates, and regional trade opportunities.
- **Green Development:** Industry perspectives on the current transition towards sustainable practices in the steel sector.
- **Technical Excellence:** Presentations on extra- large diameter seamless rolling, high-temperature materials for power units, and machine vision in pickling lines.
- **Standards & Compliance:** Unveiling of new industry standards and guidance on overseas investment risk management

This conference serves as a platform for dialogue among domestic and international stakeholders in the tube and pipe industry, aimed at fostering technical exchange and operational efficiency.

Tube China

Welded pipe markets and global investment in focus at Tube China

Forum
23 Sept 2026

The international welded pipe industry and the challenges associated with overseas investment will take centre stage at a special forum during Tube China 2026. The “World Welded Pipe Industry Development Report Release Event – Steel Industry Foreign Investment Risk Management Seminar” will be held on 23 September in the F18 Forum Area of Hall W3 at the Shanghai New International Expo Centre.

Following registration from 9:30, the programme will open at 10:00 with remarks by Su Buxin, Acting Deputy Secretary-General of the Metallurgical Council of the China Council for the Promotion of International Trade (MC-CCPIT). Guest addresses will be delivered by Su Changyong, Deputy Secretary-General of the China Iron and Steel Association and Vice President of MC-CCPIT, and Dr. Gunther Voswinckel, President of the International Tube Association (ITA).

At the heart of the forum will be the presentation of the new “World Welded Pipe Industry Development Report” by Wang

Dinghong of the Metallurgical Center for International Exchange and Cooperation. The report is expected to provide an up-to-date perspective on the development of the international welded pipe sector and its changing market environment.

The second part of the event will focus on the regulatory and commercial risks facing steel companies as they expand internationally. Mao Ning will summarise key points from the State Council’s regulations on foreign investment, while Sun Wei will examine risks connected with the global expansion of the steel industry and discuss possible prevention measures.

The compact 95-minute programme brings together market analysis, regulatory expertise and international industry perspectives. It complements Tube China’s wider focus on technological innovation and the green and intelligent transformation of tube manufacturing, while offering participants practical orientation for increasingly complex global markets.



World Welded Pipe Industry Development Report Release Event – Steel Industry

Foreign Investment Risk Management Seminar

Agenda

September 23, 10:00–11:35 – F18 Forum Area, Hall W3, Shanghai New International Expo Centre

Time	Agenda
9:30-10:00	Sign In
10:00-10:05	Host's opening remarks and introduction of the guest speaker Host: Su Buxin, Deputy Secretary-General (Acting) of the Metallurgical Council of China Council for the Promotion of International Trade (MC-CCPIT)
Guest Address	
10:05-10:25	- Su Changyong, Deputy Secretary-General of the China Iron and Steel Association and Vice President of the Metallurgical Council of China Council for the Promotion of International Trade - Dr. Gunther Voswinkel, President of the International Pipe Association (ITA)
Keynote Speech	
10:25-10:50	Metallurgical Center for International Exchange and Cooperation – Wang Dinghong, Consultant „World Welded Pipe Industry Development Report“
10:50-10:55	Group Photo Session
10:55-11:15	Metallurgical Center for International Exchange and Cooperation – Mao Ning, Senior Project Manager „Key Points Summary of the State Council's Regulations on Foreign Investment“
11:15-11:35	Metallurgical Center for International Exchange and Cooperation – Sun Wei, Project Director „Risk Analysis and Prevention Measures for the Global Expansion of the Steel Industry“
11:35	The meeting has concluded.

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Admiralty Industries Corp.

Condenser Tubing for NA-SA's Embalse Nuclear Power Plant

11,600 Admiralty Brass tubes supplied for main condenser retubing under full heat traceability.

- Full-scale production released only after NA-SA homologated every process step against a qualification batch of approximately 100 tubes
- Heat traceability held across all 11,600 tubes, each linked to its raw material origin, processing conditions and inspection records
- Documentation dossier and every supply phase formally approved by NA-SA's Quality Department; material inspected, packed and released for installation

Admiralty Industries has completed the manufacture and supply of 11,600 condenser tubes for Nucleoeléctrica Argentina S.A. (NA-SA), for the main condenser retubing of the Embalse Nuclear Power Plant in Córdoba, Argentina. The tubes were produced in Admiralty Brass to ASTM B111 UNS C44300 at 25.40 mm outside diameter and 1.24 mm minimum wall, each in a single continuous length of 10,070 mm — approximately 116.8 kilometres of drawn tube in total.

Embalse is Argentina's only CANDU-type pressurised heavy water reactor and is operating in an extended life cycle following

a major refurbishment programme. Manufacturing was completed in March 2026 and the material shipped in May 2026, in preparation for the plant's scheduled maintenance outage in September and October 2026. The specified minimum wall and the single ten-metre length placed the demand on straightness, ovality and wall distribution, controlled through the drawing schedule and the heat treatment cycle rather than corrected at final inspection.

Pre-production qualification

The project opened with a qualification batch of approximately 100 tubes, manufactured to homologate each process step, validate production parameters, confirm dimensional, mechanical and chemical compliance, and align inspection methodologies between supplier and client. NA-SA engineering and quality personnel reviewed and validated all processes, and granted the approval required to proceed to full-scale production.

"The supplier demonstrated professionalism and consistency throughout the entire process," said Julio Sescun, Engineering Department, and Ramiro Angeletti, Quality Control Department, of NA-SA. "The pre-production qualification phase, involving the initial batch of tubes, was executed with rigour and transparency, allowing all manufacturing steps to be homologated and validated."

Production and heat traceability

Full-scale manufacturing was carried out under controlled and closely monitored conditions, in alignment with the parameters validated during qualification. The production sequence covered transformation of the raw material through tube drawing, heat treatment, straightening and dimensional control, followed by non-destructive testing — eddy current examination with both internal and external probes — and final mechanical and chemical verification.

Full heat traceability was maintained throughout, each tube linked to its corre-



Fig. 1 Admiralty Brass condenser tubes to ASTM B111 UNS C44300, 25.40 mm OD × 1.24 mm minimum wall, end-capped following final inspection.

sponding raw material, processing conditions and inspection records across every stage of production. NA-SA's engineering and quality teams reviewed manufacturing records and verified inspection data continuously as production progressed.

Documentation and acceptance

The documentation dossier comprised Mill Test Reports, individual material certificates, internal and external probe eddy current testing reports, packing control documentation including heat traceability summaries per crate, and detailed manufacturing records. The complete package was formally reviewed and approved by NA-SA's Quality Department.

All material underwent final inspection before packing into 40 export-grade, steel-framed wooden crates, each identifying heat numbers, tube quantities, and net and gross weights. The project was completed with full acceptance by Nucleoeléctrica Argentina S.A.

A reference for nuclear condenser retubing

The Embalse project reflects Admiralty Industries' approach to power-sector supply: qualification established before volume, heat traceability maintained across the full production chain, and documentation prepared to the standard a plant quality department will accept. As life-extension programmes bring long-running units into second operating cycles across the global nuclear fleet, Admiralty Industries offers Embalse as a reference for condenser retubing executed to the quality requirements of a nuclear operator.

About Admiralty Industries

Admiralty Industries Corporation supplies seamless copper alloy and nickel alloy tubing, finned tubes and tubesheets for heat exchangers and condensers in power generation, process, refining and marine applications, with production facilities in mainland China.

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Fig. 2 Continuous marking applied in production — manufacturer, material specification and order reference — supporting traceability to individual tube level.



Fig. 3 One of 40 export-grade, steel-framed wooden crates prepared for shipment, each crate marked with its heat numbers, tube quantities and weights.



Fig. 4 Inspection of the existing main condenser tubesheet at the Embalse Nuclear Power Plant, carried out in preparation for retubing.
Photograph: Nucleoeléctrica Argentina S.A.



Fig. 5 Order and heat identification marked continuously along each tube length.

Boehlerit

Boehlerit – The Partner in bar peeling

As a partner for successful bar peeling, Boehlerit offers complete tooling systems — bar peeling heads, tool holders and cassettes — as well as tools for bar-end machining and wire shaving rings.

Bar peeling is a heavy-duty cutting process that is economically employed in diameter ranges from 20 up to 500 – 600 millimetres. With standard materials, feed rates of up to 18 millimetres per revolution are common today, which represents many times what is possible in conventional turning. Using appropriate cassette systems, depths of cut of up to 15 millimetres can be achieved.

Always at the forefront

Bar peelers benefit from comprehensive know-how gained from a wide range of applications and processes when it comes to achieving performance increases through new coating developments. In addition, Boehlerit has all coating technologies in-house. Due to the process conditions—particularly the extremely high feed rates—the greatest

challenges arise from the required coating adhesion. Much more than in conventional turning, application-specific design of cutting edge geometries moves to the forefront in bar peeling. In Boehlerit's portfolio, users will find the broadest geometry program available in standard versions, tailored to a wide range of material classes.

Currently, simulation software is used in the development of new insert geometries to analyze chip flow as well as the temperatures and forces generated, in order to achieve the best possible results. A large number of parameters are fed into the software to obtain results that are as close to reality as possible. The interaction between cutting material, coating, geometry, and cutting-edge preparation is usually dependent on the machine and the material to be machined.

Applications are constantly changing, as new materials to be machined are continually being developed and driven by cost savings, machining allowance—especially for smaller diameters—is reduced to a minimum before the peeling process. This aspect presents particular challenges in terms of roundness and surface quality. For larger diameters, this is only possible to a limited extent due to the manufacturing process, which is why tandem or trio peeling systems with large round inserts for high material removal rates are still used.

Current examples of innovative solutions for machining new materials or for achieving significant performance increases in bar peeling include the development of new indexable insert grades for machining carbon steels, the nanotechnology of the universal peeling turning grade BCP25P, and the new grades BCP05P, BCP10P, BCP15P, and BCP35P. In addition, we offer grade solutions for non-ferrous metals such as aluminum and copper. Further information can be found in our new bar peeling catalogue.



Fig. 1: As a partner for successful bar peeling, Boehlerit offers complete tool systems, i.e. bar peeling head, holder and cassettes.

Boehlerit

Grown from Responsibility – WeCare 2026

What began as a way to bring together local sustainability projects has evolved into a globally supported initiative with measurable impact: the WeCare Initiative of the Brucklacher Group. In 2026, employees around the world once again took part in the annual action weeks, using their projects to send a strong message of responsibility, solidarity, and commitment.

Sustainability and social engagement have been integral parts of the corporate culture for decades and are deeply embedded in the DNA of the sister companies Leitz, Boehlerit, and Bilz. Since 2022, WeCare has systematically united these activities of the Brucklacher Group in the fields of society, social affairs and culture, as well as biodiversity, nature, and environmental protection, making them more visible on an international scale and continuously developing their impact. The initiative aims to combine strengths, leverage synergies, and expand the reach of these efforts. Smaller regional projects, in particular, benefit from the shared platform through additional support while remaining firmly rooted in their local communities.

A Strong Statement in the Anniversary Year

In Leitz's anniversary year, this commitment takes on even greater significance. 150 years of company history stand not only for tradition and innovative strength but also for a values-based corporate culture. The WeCare Initiative demonstrates how these values are actively lived and carried into the future through employees who take responsibility and help shape the world around them in a sustainable way.

Since the launch of the initiative, employees have developed and implemented projects each year with remarkable personal dedication. These projects connect locations across national borders and illustrate how individual ideas can grow into collective action.



Working together for nature conservation: As part of a WeCare initiative, employees in Oberkochen surveyed approximately 16 hectares of meadowland to rescue fawns, making an important contribution to wildlife conservation and biodiversity protection. (Photos: Leitz/Boehlerit/Bilz)

Figures That Demonstrate Impact

Once again, 2026 highlighted the impressive level of global participation during the action weeks.

A total of 153 projects in 33 countries were carried out by 2,004 employees, who collectively contributed more than 5,300 hours of voluntary work. The results underscore the broad scope of the initiative: more than 900 trees planted, 22 liters of blood donated, and measurable savings of 1.8 tonnes of CO₂ emissions and 1.7 tonnes of waste exemplify the active contribution to environmental and resource protection. In addition, donations and financial contributions amounted to approximately €77,000 this year.

When Commitment Brings People Together

Behind these figures are numerous projects that strengthen communities, protect natural habitats, and provide meaningful support





Improved learning conditions on site: As part of a WeCare initiative by Leitz, new restroom facilities were built in Bangalore, India, while existing sanitary areas underwent extensive renovation, helping to create a better learning environment for students. (Photos: Leitz/Boehlerit/Bilz)



A contribution to environmental and climate protection: As part of a WeCare initiative, 32 new fruit trees were planted on the premises of Leitz Brazil, making a tangible contribution to biodiversity, environmental stewardship, and climate protection. (Photos: Leitz/Boehlerit/Bilz)

where it is needed most. “WeCare has great personal significance for me. The initiative strengthens solidarity and fosters a strong sense of belonging. At the same time, it fills me with pride and gratitude to see the dedication with which our employees around the world contribute to these efforts,” says Dr. Cornelia Brucklacher, Chairwoman of the Supervisory Boards and Shareholder of the Brucklacher Group. In this way, WeCare has become a unifying force that promotes a shared understanding of responsibility and sustainably shapes the corporate culture of the Brucklacher Group—extending far beyond day-to-day business and creating a lasting positive impact.

About the Brucklacher Group

The three legally independent sister companies Leitz, Boehlerit and Bilz together form the globally active Brucklacher Group. As a manufacturing service provider, the Leitz Group is the world’s leading manufacturer of tools for machining wood, wood-based materials and state-of-the-art materials. The fifth-generation family business was founded in Oberkochen, Germany, in 1876 and is characterised by long-term thinking and sustainable action. As a carbide pioneer, the Boehlerit Group is one of the world’s leading manufacturers of wear protection solutions and cutting tools for machining metal and composite materials. The Bilz Group is the global specialist for precise clamping, defined movement and manual quick-change of precision tools. Thanks to the vertical integration of the sister companies, they offer their customers coordinated and optimised solutions from a single source. The joint strength of the sister companies is continuously expanded through the realisation of synergies and targeted joint research and development. With a total of 17 production sites, its own sales and service companies in 38 countries with 139 locations and an exclusive worldwide partner network, the Brucklacher Group is a global player represented on every continent. The Brucklacher Group employs over 4,000 people worldwide and generates an annual turnover of around 500 million euros.

Boehlerit

Boehlerit showcases premium solutions for demanding applications at AMB 2026

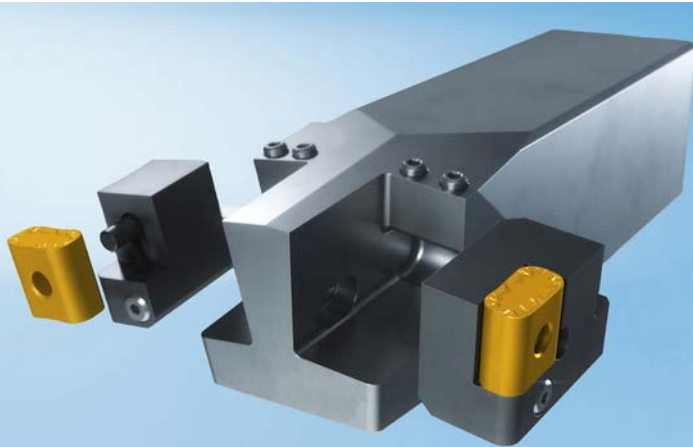


New steel turning generation

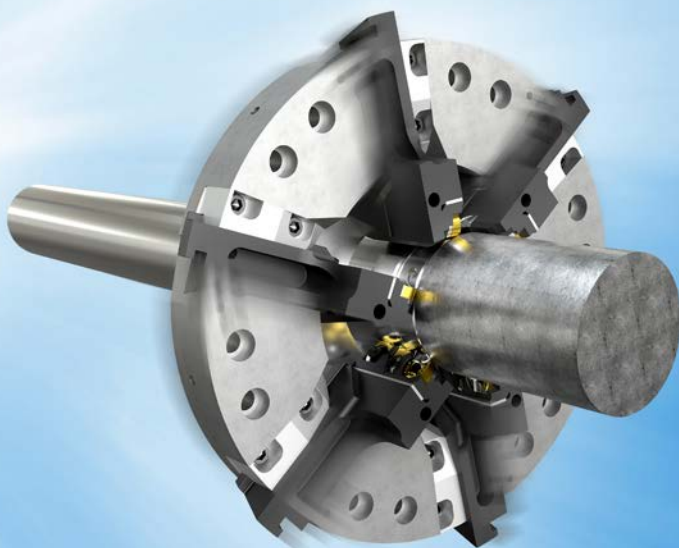
At AMB 2026 in Stuttgart, Boehlerit will present a wide range of new products for industrial manufacturing. The focus will be on innovative tooling solutions for machining metals and composite materials, advanced wear protection technologies, and the company's role as an independent development and technology partner to the international tooling industry.

A particular highlight is the new grade generation for steel turning applications. With the grades **BCP05T**, **BCP15T**, **BCP25T**, **BCP35T**,

and **BCP40T**, Boehlerit is launching a completely newly developed product family. New carbide substrates, state-of-the-art coating technologies, and optimized chip-flow geometries ensure longer tool life, reliable wear detection, and consistently high machining performance. The grades **BCP05T** to **BCP25T** are designed for stable machining conditions and high cutting speeds, while **BCP35T** and **BCP40T** stand out for their exceptional toughness and deliver outstanding performance in interrupted cuts and demanding machining environments.



Railway wheel machining



Bar peeling

Boehlerit is also introducing an important innovation in milling. The company's high-feed portfolio is being expanded with the new **THETatec** 25N Feed milling system. Based on a negative insert design, the tool concept combines the advantages of modern high-feed machining with eight truly usable cutting edges. Users benefit from higher material removal rates, improved cost efficiency, and excellent process reliability, even in challenging applications.

With the new thread rolling systems from Wagner, Boehlerit is strategically expanding its portfolio. These systems enable cost-effective thread production with outstanding surface quality, excellent strength properties, and high process reliability. A wide range of configurations allows the tools to be optimally adapted to different manufacturing requirements.

For high-precision sawing applications, Boehlerit is also presenting **Sawtec Brazed**. The brazed design permanently joins the saw teeth to the saw blade, ensuring high stability, excellent cutting quality, and long tool life, even under extreme operating conditions.

In addition, Boehlerit continues to advance its portfolio in the field of **bar peeling**. As a full-service provider, the company offers customized tooling systems ranging from peeling heads, holders, and cassettes to solutions for bar end machining and wire scarfing. New indexable insert grades for

Thread rolling HELIX



machining carbon steels, together with the nanotechnology-optimized universal grade **BCP25P** and the grades **BCP10P** and **BCP15P**, deliver significant performance improvements for modern materials and applications.

The portfolio is further complemented by specially developed tooling solutions for reprofiling worn contact surfaces on railway wheels, as well as Boehlerit's extensive expertise in heavy-duty machining. With these latest product innovations, the company reinforces its commitment to providing customers worldwide with powerful, cost-effective, and future-oriented manufacturing solutions from a single source.

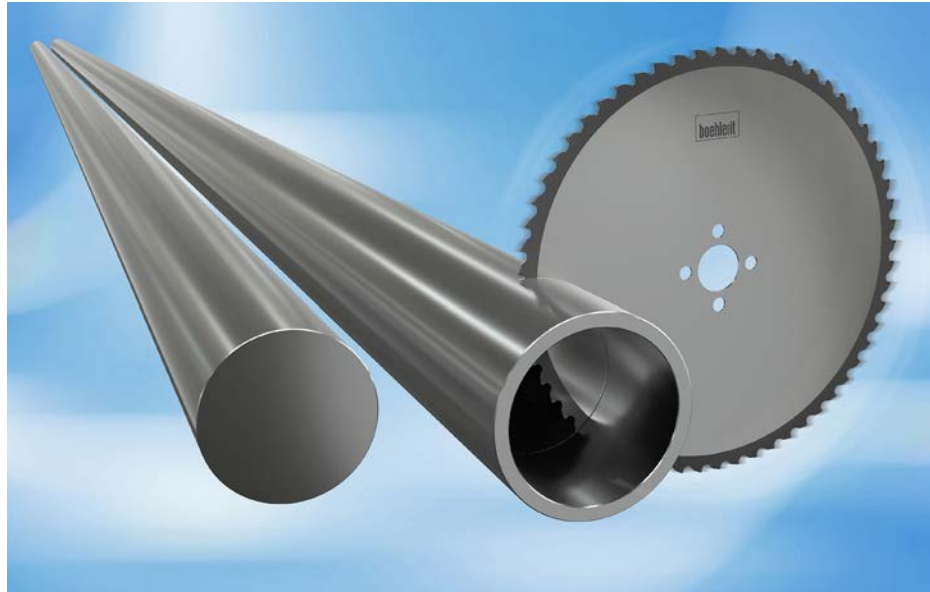
Visit us at Hall 1, Booth 1H10, and turn the future together with us!

The company

As a carbide pioneer, the Boehlerit Group is one of the world's leading manufacturers of wear protection solutions and cutting tools for machining metal and composite materials. With cutting materials, semi-finished products, precision tools and tool systems for milling, turning, grooving and forming, the family-owned company has been ensuring process reliability and efficiency worldwide since 1932. Around 700 employees offer customers comprehensive expertise in all aspects of metallurgy in order to realise process-optimised production technologies, the highest quality and a head start in tool productivity. With three production sites in Europe and Asia, international subsidiaries and a network of sales partners, the carbide and tool specialist has a global presence. Together with its two legally independent sister companies Leitz and Bilz, the Boehlerit Group forms the globally active Brucklacher Group, in which over 4,000 employees generate an annual turnover of around 500 million euros.

We take responsibility

We continuously optimize our production processes to use resources more efficiently and reduce our CO₂ footprint over the long term. Through investments in sales, products, and manufacturing, as well as the implementation of new and innovative technologies, this goal can be achieved step by step.



Railway wheel machining



THETAtec 25N Feed

Boehlerit GmbH & Co.KG

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Fives Group – Fives OTO S.p.A.

Driving innovation forward with OTO tube mills at Searing Industries

Searing Industries, a leading US manufacturer of welded steel tubing, has renewed its trust in Fives, an international engineering group, to further enhance and innovate its production capabilities with advanced OTO tube mill technologies.

Fives is developing innovative R&D solutions to help Searing Industries exceed current market standards, including new robotic shears and end welders, and a debander.

The company recently awarded Fives new contracts for a complete OTO tube mill and innovative entry lines, which feature innovation, integrated systems, and full automation. This advanced technology ensures consistently high quality, reduced lead times, and the ability to meet increasingly complex customer requirements.

Always ahead through innovation

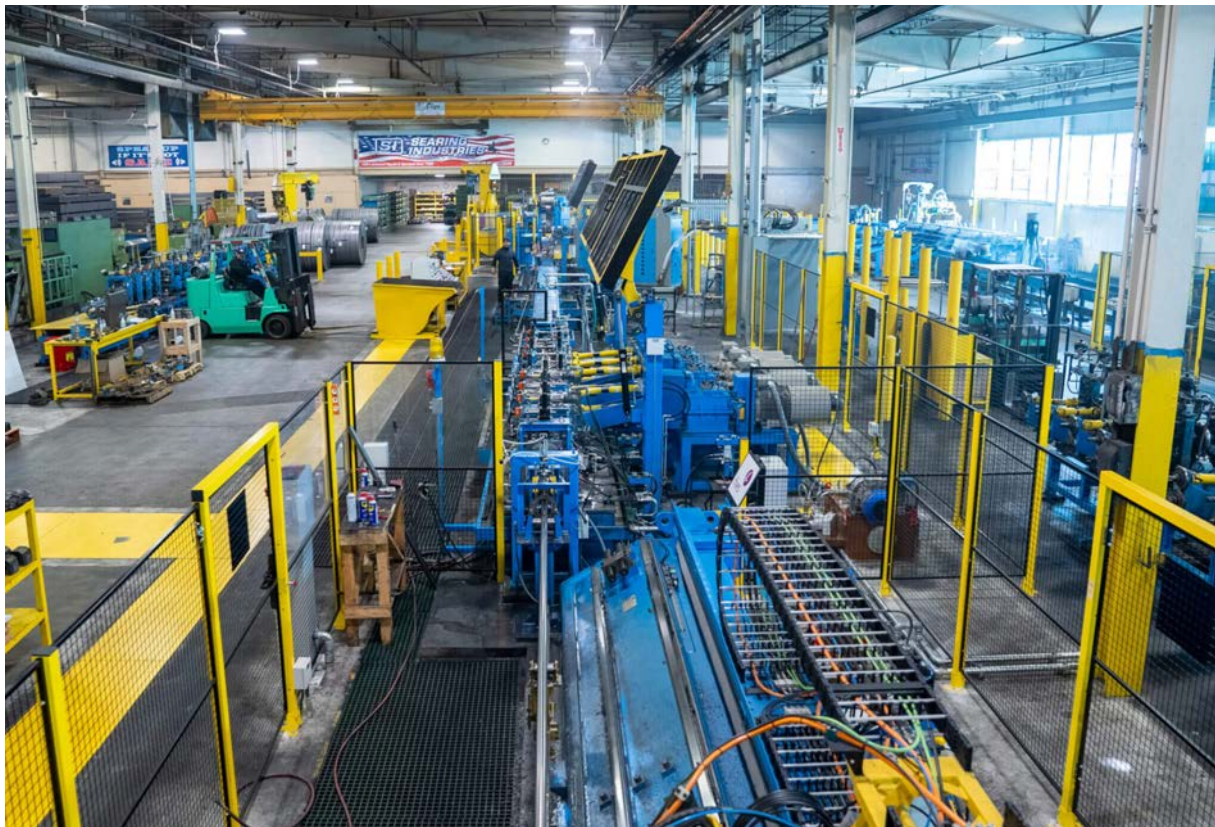
The fully automated shears and end welders ensure maximum flexibility in cutting

cycles and trajectories, improve machine accessibility and maintenance, and reduce the overall footprint.

Additionally, a new debander easily adapts to various coil types and plant layouts by automatically removing straps from incoming coils. During strap detection, the system verifies the coil's diameter and width, the strap's width, and the spacing between straps, issuing alerts in case of anomalies. This reduces the number of operators required and significantly lowers health and safety risks.

The technology is fully integrated with digital solutions, including AI modules, to optimize process performance and provide operators with real time feedback during daily operations.

OTO tube mill at Searing Industries



Fives Group – Fives OTO S.p.A.

High-productivity OTO tube mill and finishing equipment at Aceros Arequipa

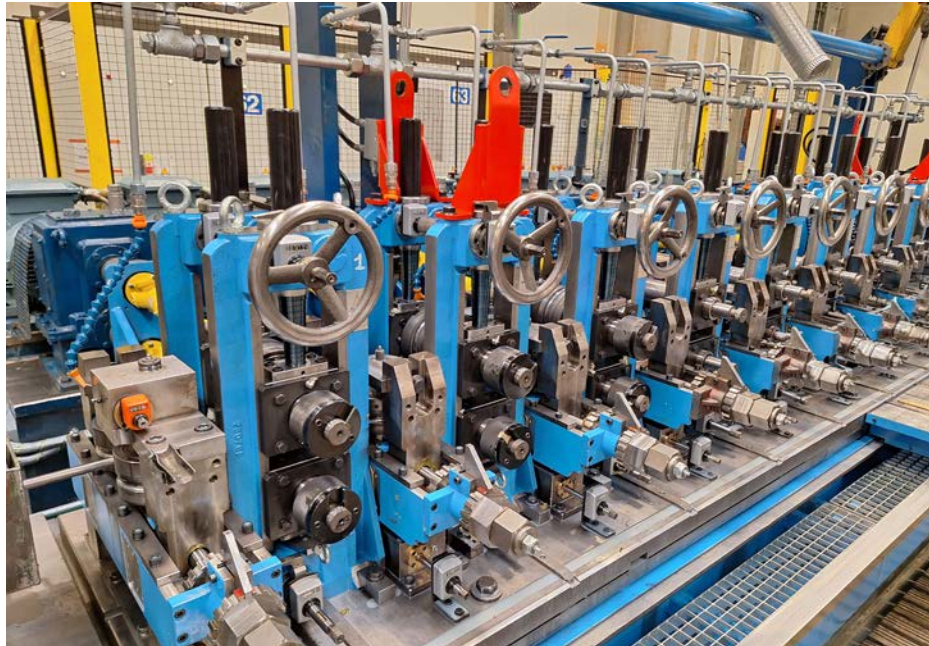
Aceros Arequipa, a leading Peruvian steel producer, contracted Fives to supply a complete OTO tube mill with integrated finishing equipment for its plant in Lima, Peru. The scope of supply includes the entire production line, from the entry section to packaging and strapping, reinforcing the company's commitment to product quality, operational efficiency, and high productivity.

Turnkey project

The new OTO tube mill will be designed, supplied, and installed by Fives to produce tubes for construction and structural applications. The line will handle wall thicknesses up to 2 mm and diameters up to 40 mm. It will also feature a state-of-the-art packaging section, enabling Aceros Arequipa to produce tube bundles at very high speed.

Advanced software packages will support operators in both equipment operation and preventive maintenance activities. The fully automated workflow minimizes manual intervention, reducing operator exposure to risk and enhancing overall plant safety.

"This is the fourth OTO tube mill that Aceros Arequipa has purchased from Fives, confirming the long standing partnership between our companies and the confidence placed in our technology and expertise," says Carlos Quintanilla, Vice President of Sales - Mexico and Latin America at Fives. "This project was developed through close collaboration, supporting the customer with technical recommendations and best practices to achieve stable production, high-quality standards, and maximum productivity."



OTO tube mill



Fives Group – Fives OTO S.p.A.

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Magnetic Analysis Corp.

MAN – your European Supplier of NDT Systems:



Magnetic Analysis Shanghai team at tradeshow in 2025. L to R: Zhao Dezhong (Service), Shijie Li (Business Leader, China and Southeast Asia), and Miles Jing (Technical Sales Manager).

Since its first equipment sale in China in 1974, Magnetic Analysis has spent more than 52 years supporting the country's NDT industry with innovative inspection technologies and dedicated local expertise. Guided now by a team of experts, including field/service engineers, administration for quick processing, and sales leader Shijie Li, the MAN (Magnetic Analysis Nordic AB) team, located in Shanghai has continuously built a reputation of effectiveness and efficiency.

The Varimac, an eddy current comparator, was the first sale for the team in China; as the market in China grew so did the innovations and offerings of test modalities. In 2001 a UT Rotary was sold, marking the beginning of ultrasonic equipment offerings in China, that today includes Echomac® electronics, UT rotaries, PAUT rotaries and turnkey systems both spinning and static, primarily for testing tubes and bars.

On September 29, 2000 the assets of Contest Marketing AB, a highly regarded supplier of custom eddy current and flux

leakage systems for 20 years, were bought out and became part of newly formed Magnetic Analysis Nordic AB, the European based headquarters. Karl Bergstrand, who had developed several custom test systems under the name of Bergstrand Quality Control and was a well-known figure in the field of NDT, was appointed Managing Director of the newly created MAN. By 2002, MAN's NDT work was expanding under Bergstrand's leadership and in May 2002 he was a featured speaker at a Steel conference on "Detecting Long Cracks in Hot Wire Rod During Rolling." In 2003 Per Nilson, was appointed Managing Director of MAN, and oversaw the key sales of a 500mm UT/MFL system to Russia in 2013-14 and other sales, until his retirement in 2018.

Now, Goran Malmberg, Plant Manager, and Ulf Jansson, Engineering Manager, run MAN in a joint effort with a team that has developed innovations including a constant center triple bench, a second generation of TacTic® (a spin-the-tube system) and



automated conveyors. Jansson states, “The Östersund plant has indeed seen strong growth over the past year (2025-26), both in terms of headcount and delivery volumes, and we are on track for our largest year in a long time, driven by increased demand and a broader project pipeline.”

A recent project by the MAN team featured a custom TacTic® UT system with a Production Comparator and a fully customized inlet and feed solution for inspecting ¼-inch hex rods. The small diameter created an alignment challenge at the production speeds required by the customer. True to MAN’s commitment to custom-engineered solutions, the team developed an OEM adaptation to overcome this issue. Engineers designed a specialized lifting and guiding mechanism that accurately centered the hex rods and smoothly fed them into the

test chamber with minimal operator involvement.

This project reflects MAN’s approach to solving complex inspection challenges. As Thierry Laffont, European Business Leader with more than 17 years of experience, explains, “Throughout Europe, MAN is recognized as a premier provider of essential NDT modalities. Because the company’s efforts are supported by a dedicated team of field and application engineers, we can offer clients unparalleled customization compared to standard solutions.”

MAN’s extensive product line includes instruments and systems with EC, UT, PAUT, and MFL test modalities. A few instruments will be on display at Tube China at booth E1E05, including the Echomac 25mm Rotary and electronics, the Minimac® II eddy cur-

Magnetic Analysis Nordic AB’s plant in Östersund, Sweden.

TacTic® UT system, designed to handle special alloy and stainless steel hex rods.



A multimodality system with an Echomac® 25mm UT rotary test station and Echomac® electronics on display.



rent tester Rotomac HS rotary and Varimac VI (coils will be displayed).

Echomac® 25mm UT Rotary and Echomac® II electronics, are both available as standalone instruments or as a turnkey total tube/bar NDT system. Designed for high-precision inspection of small-diameter, thin-wall products used in critical end applications, the rotary tests diameters from 5 to 25 mm while providing 100% coverage at speeds up to 8,000 RPM. The tested product can have a wall thickness as thin as 0.4mm with a minimal length of 1.2 meters and still operate at a precise thickness resolution of < 1µm with repeatable results.

The Echomac® 25mm rotary is paired with MAN's Echomac® FD6 II electronic instrument to provide flaw detection, thickness and dimensional measurements with 16 independent test channels in a single computer. Common applications include testing for internal defects, inclusions, inspecting for ovality and/or eccentricity, inspecting strip prior to welding and geometric measurements.

The eddy current Minimac® II instrument for inspecting wire, rod and tube for short surface and some subsurface defects at speeds up to 1,219 mpm will also be on display with a linear rail fixture to demonstrate small diameter wire testing. Frequent applications for the digital eddy current

instrument include inspecting welding wire, including flux core wire where it can detect missing flux as well as flaws in the wire itself, checking continuity and detecting welds in single and multiconductor insulated wire or cable. The equipment can be enabled with an MID option for detecting magnetic inclusions in non-magnetic products. With one or two channels on a single coil drive, the compact, fan less computer chassis, the Minimac® II is great for low SWaP requirements. This second generation Minimac® series is fully embedded, allowing operation with or without a host computer running, and providing highly reliable testing. Multiple threshold analysis is an effective feature of the Minimac® II for those interested in separating different types of defects or distinguishing defect signals from acceptable surface conditions.

For highspeed testing of small diameter wire, rod, and tube for longitudinal defects, the booth will have the Rotomac® 25mm High Speed rotary on display. With a test diameter range of 2-25 mm and designed to operate at 10,000 RPM production speeds, the highly sensitive non-contact eddy current rotary offers detection of longitudinal surface flaws like seams and laps.

Enabled with two test channels, the rotary operates with either MultiMac® II or Minimac® II electronics for repeatable digitally stored results. The Rotomac® can test both

non-shaped and shaped wire with its easy to setup distance compensation feature and has larger model sizes available for product diameters greater than 25mm.

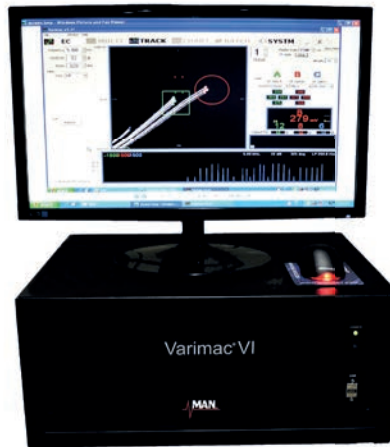
The Varimac® VI Comparator is an eddy current comparator designed to test hardness, alloy, dimensions, and physical characteristics in metal.

The broad frequency range of 100Hz to 2MHz allows the Varimac® to have high sensitivity and resolution for separating wanted and unwanted conditions. The instrument includes a piece count output feature to activate an alarm or other device when a specified number has been reached. Additional applications for the instrument include the testing of fasteners, bearings, and other cold formed parts or high speed (up to 6 parts per second) sorting based on targeted specifications.

Looking for a turnkey NDT solution? Want to partner with a local team of highly experienced engineers backed by more than 50 years of success in the Chinese NDT industry? Interested in integrated inspection systems featuring multiple modalities, including UT, ET, PAUT, and MFL? Visit Magnetic Analysis Nordic AB at Booth E1E05 to see live demonstrations of the UT 25mm, Rotomac® Rotary, Minimac® II, and Varimac®. Meet MAN's knowledgeable Shanghai-based team and discover how their local expertise and decades of industry experience can help solve your inspection challenges.



Eddy current rotaries, Rotomac® series, (above is the 25mm RM) with rotary test probe technology is the method of choice for detecting seam-like defects. They can be utilized with MultiMac® II electronics for high-quality inspections.



The Varimac® monitor screen displays rectangular targets that show "acceptable" parts in the green box, "above spec" in the red box, and "below spec" outside the box.



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SMS group GmbH

SMS group wins new order for two PQF® seamless tube plants from Baosteel Steel Pipe in China

- SMS group to supply the core equipment and level 1 automation for two PQF® tube rolling lines in Ma'anshan, China
- Order covers two PQF® seamless tube plants with design capacities of nearly 1.18 million tons each per year
- Scope includes two PQF® mills, two cone type piercing mills, two stretch reducing mills, CARTAneo process software, and redressing equipment
- First pipe to be produced in Q4/ 2027

Contract signing ceremony with Baosteel Steel Pipe (Ma'anshan) Science and Technology and SMS group

SMS group has secured a new order from Baosteel Steel Pipe (Ma'anshan) Science and Technology Co., Ltd. to deliver two PQF® seamless tube rolling lines (PQF®: pre-

mium quality finishing) to Ma'anshan, Anhui Province, China. This further solidifies the long-standing partnership between the two companies.

SMS will deliver all core components and automation systems. The scope of supply covers two PQF® seamless tube plants.

The PQF159 includes a cone roll piercing mill CTP1000VD, a seven-inch PQF® BCO mill, and a 350A28 stretch reducing mill (SRM).

The PQF258 comprises a CTP1150VD cone roll piercing mill, a ten-inch PQF® BCO mill, and a 500A20 stretch reducing mill. SMS will also provide two PQF® redressing



machines for the PQF® stands and two KR roll groove dressing machines for the SRM stands.

In addition to the mechanical equipment, SMS will supply the complete level 1 automation system, technological measurement system (TMS), and CARTAnéo® process technology software. This fully integrated automation solution features the latest advancements in crop end control (CEC), wall thickness control (WTCA and WTCL), as well as comprehensive metrology data analysis throughout the PQF® mills.

PQF® technology enables the plant to run with maximum efficiency, optimized operational costs, and reduced downtimes, while at the same time maintaining high productivity and quality. Compared with legacy seamless tube lines, PQF® plants deliver higher precision and performance, helping Baosteel to achieve its production and quality objectives.

"We are proud to have been selected once again by Baosteel Steel Pipe as a trusted supplier and long-term partner. This important order reflects both the strength of our partnership and the confidence in our technological expertise and seamless pipe solutions. SMS group is committed to deliver outstanding performance, efficiency, and product quality, supporting Baosteel in achieving its ambitious growth and production targets," says Christian Haferkamp, General Manager Sales & Technology Seamless Tube Plants, SMS group.

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3/26 Tube India
review Tube China, preview 2027
deadline: October 16th, 2026



Tecnar

Baosteel selects four Tecnar Lut DPS systems for two advanced seamless tube mills in China

Major order confirms Lut as the new standard for advanced seamless tube production sensors

Tecnar Automation Ltee. has received an order for four Lut DPS (Dual Probe Scanning model) units for two new seamless tube production lines being supplied to Baosteel Group Co. in China.

The four-system project represents Tecnar's largest single order for non-contact wall-thickness gauges in the seamless tube and pipe industry. It also marks an important stage in the adoption of Tecnar's Lut technology by Chinese steelmakers operating some of the world's most advanced seamless tube production facilities.

The two new production lines will be supplied by SMS group, a leading German designer and builder of metallurgical equipment. Each line will include two Tecnar

Lut DPS systems—one after the Premium Quality Finishing (PQF) mill and one after the stretch reducing mill (SRM)—integrated with SMS's automation and CARTA®neo process-technology software to provide real-time wall-thickness data for process control and optimization.

This dual-location configuration will provide Baosteel with dimensional information at two critical stages of the seamless tube manufacturing process. The measurements will support product quality assurance, help characterize and optimize the effects of the principal rolling and finishing operations, and provide real-time dimensional data to the SMS automation and process-control systems.

"This is also one of the largest single orders ever awarded for non-contact thickness gauges in the seamless pipe industry," said Mr. Alexandre Nadeau, Chief Executive Officer of Tecnar. "The fact that it comes from Baosteel for two new plants being built by SMS group is an important confirmation of the progress made by Tecnar's Lut technology and of its value for advanced seamless tube production."

Measurements at two critical production stages

Installing a Lut DPS system after both the PQF mill and the stretch reducing mill (SRM) on each production line provides a detailed view of how the tube or pipe wall profile evolves through the principal forming and finishing operations. Measurements from the two locations also provide the data required for automated process control, faster troubleshooting and more effective mill setup.

The first Lut DPS is positioned after the PQF mill. At this location, it measures the dimensional results produced by the upstream piercing process and the subsequent elongation and wall-thickness forming op-

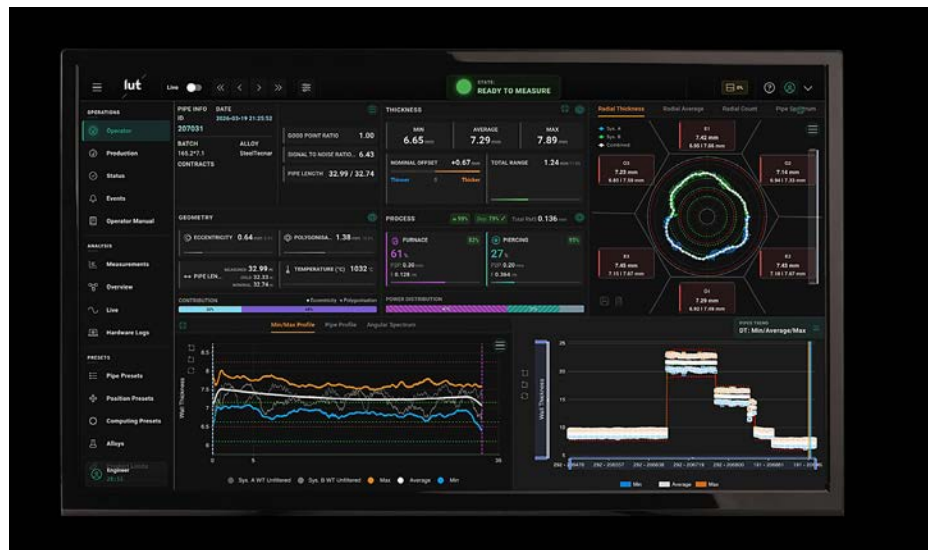


*Representatives of companies during the signing of the contract for four Lut DPS systems.
Photo courtesy of Tecnar Automation Ltee.*

erations performed by the PQF mill. The circumferential wall-thickness profile reveals the effects of the pressure balance among the three PQF rolls, helping operators identify adjustments that may be required to improve wall uniformity. The cycle-analysis functions included in the Lut data-processing software analyze the longitudinal wall-thickness profile and help distinguish between different sources of periodic eccentricity. For example, the analysis can indicate whether a recurring wall-thickness variation is more likely associated with non-uniform heating or with the piercing plug. The results of the measurements are presented through clear, easy-to-read operator displays, enabling plant personnel to recognize abnormal dimensional patterns more quickly, identify their probable origin and take corrective action before a larger quantity of production is affected.

The second Lut DPS is positioned at the output of the SRM. Using Tecnar's digital-twin processing, the system reconstructs the complete wall-thickness distribution and generates average, minimum and maximum wall-thickness profiles along the product length. Because of the smaller finished diameter, competing technologies are typically limited to average wall-thickness measurements at this location. In contrast, the Lut DPS continues to provide the same detailed dimensional information available on larger-diameter products, including both the longitudinal wall-thickness profile and the radial profile around the circumference. Operators can therefore identify not only variations along the tube or pipe length but also localized thin and thick regions around the wall, providing a substantially more complete representation of the finished product.

Data from the two Lut systems are used by the SMS CARTA®neo process-control system for automated feedback control of the SRM. In particular, the average longitudinal wall-thickness profile reconstructed by the Lut DPS provides CARTA®neo with real-time information on how the wall thickness changes along the tube or pipe. By comparing the dimensional results measured before and after stretch reduction, the control system can determine the appropriate process corrections and stabilize the



Data display for Lut DPS

average wall thickness over the maximum usable product length.

In addition to the average profile supplied for process control, the minimum wall-thickness profile provides a further advantage available from the Lut DPS at the SRM output. It gives operators and process specialists a direct indication of the lowest local wall thickness along the product, allowing the performance of the control strategy to be assessed while supporting operation closer to the lower wall-thickness tolerance without compromising product compliance. The result is improved material utilization together with more consistent wall-thickness performance from end to end.

The Lut gauge at the SRM also clearly identifies the tapered regions at the front and rear ends of the product. This information can be used to optimize cutting positions automatically, reducing the amount of material removed while ensuring that the finished product remains within dimensional tolerances.

Where automated feedback control is not implemented, the same measurement data remain valuable for mill setup, process troubleshooting and the refinement of production models. Operators and process specialists can compare the profiles measured before and after the SRM to determine where dimensional variations originate and where corrective action should be applied.

The value of dual-location measurement therefore extends well beyond confirming that the final tube or pipe is within tolerance. It provides a detailed understanding of how the product geometry develops through the mill and transforms dimensional measurement into an active source of information for process control, quality improvement and production optimization.

China's role in the development of the new-generation Lut

China has played a central role in the development of Tecnar's latest generation of Lut systems. In addition to the new Baosteel order, Tecnar has worked with Daye Special Steel, Baotou Steel, Jingjiang Jingyu Special Steel, Hengyang Valin Steel Tube and Henan Fengbao Special Steel. Experience gained at these plants has contributed to improvements in system reliability, ultrasonic performance, measurement range, signal processing and wall-profile reconstruction.

"Tecnar's customer base in China has been highly collaborative throughout the development of the new generation of Lut products," Mr. Nadeau said. "Their operating experience has helped us extend the measurement range, improve industrial performance and address a much wider range of seamless tube and pipe dimensions."

The Baosteel contract will increase Tecnar's installed fleet of new-generation Lut systems in China to ten units. To support this growing base, Tecnar plans to double the size of its local team by the end of 2026. This expansion will strengthen local project execution, commissioning, maintenance and technical support, while creating a closer link between Chinese customers and Tecnar's engineering and product-development teams in Canada. "This permanent base will establish the infrastructure for the next 20 years of growth in China," Mr. Nadeau said. "The success of these projects depends on a strong local team working closely with our innovation and engineering teams in Canada."

Non-contact ultrasonic measurement of hot tubes

Tecnar's Lut system uses laser-ultrasonics, a non-contact ultrasonic technology,

to measure tube and pipe wall thickness without physically contacting the product. A short laser pulse generates an ultrasonic wave at the surface of the hot tube or pipe, while a separate laser-based optical receiver detects the echoes returning to the surface after propagating through the wall. The high-accuracy ultrasonic time-of-flight measurement is then converted into wall thickness using the applicable temperature-dependent acoustic velocity and real-time processing parameters.

Because both ultrasonic generation and detection are optical, the measurement requires no direct mechanical contact with the material. The Lut gauge can therefore operate on hot, moving tube and pipe products under demanding mill conditions, despite the elevated temperatures, vibration and lateral movement commonly encountered on seamless tube and pipe production lines.

As the tube or pipe translates through the inspection station, the measurement probes rotate around its circumference and acquire high-speed, point-by-point wall-thickness data. These measurements are combined with information on product movement to reconstruct the wall-thickness distribution around the circumference and along the full length of each tube or pipe.

The resulting information is not limited to a single average wall-thickness value. The Lut system provides a more complete representation of the wall profile, including localized minimum and maximum values, giving operators and process specialists greater visibility into the dimensional results produced by the mill.

The newest generation of the Lut system also integrates an outer-diameter measurement system. This added capability allows wall-thickness and outer-diameter data to be acquired within the same online measurement platform and associated with the same tube or pipe position. Combining these functions in a single system reduces the overall installation footprint while providing a more comprehensive assessment of the finished product and additional real-time information for quality control, process monitoring and automated mill feedback.



Measuring wall thicknesses beyond 90 mm wall thickness

One of the most significant technical developments of the Lut gauge has been the extension of its measurement range to hot seamless tube and pipe products with wall thicknesses exceeding 90 mm, nearly twice the range of competing radiation-based systems. At Daye Special Steel in China, the Lut DPS routinely measures products with wall thicknesses of 95 mm and greater. These industrial results demonstrate that laser-ultrasonic technology can be applied not only to conventional seamless tube and pipe dimensions, but also to a variety of heavy-wall products.

This capability is supported by Tecnar's development of the MarathonTM, a novel high-power, short-pulse laser designed specifically for this demanding application. One of the principal technical challenges in measuring heavy wall is the strong attenu-

ation of ultrasonic waves as they propagate through hot steel. The high-amplitude ultrasonic pulse generated by the MarathonTM makes it possible to overcome this attenuation and obtain reliable measurements through substantially thicker walls.

The successful extension of the measurement range allows operators to install Lut sensors at production locations that were previously considered impractical for online thickness measurement. It also enables the same measurement technology to be used across a broad product portfolio, ranging from small-diameter tubes at the output of a stretch reducing mill to heavy-wall products manufactured for demanding energy, mechanical and industrial applications.

Tecnar is now extending this capability to other heavy-wall product markets, including heavy-plate manufacturing, where real-time thickness information can support improved process control and product consistency.

*Tecnar Lut gauge performing online wall-thickness measurements on a hot seamless tube.
Photo courtesy of Tecnar Automation Ltee.*

Digital-twin processing at the SRM output

A second major development incorporated into the new generation of Lut systems is Tecnar's digital-twin processing technology. Its development was based on the analysis of extensive wall-thickness data collected by Lut systems operating on production lines in China. These data revealed consistent circumferential wall-thickness patterns across consecutive pipes and along individual long products. This observation enabled Tecnar's data-processing specialists to distinguish radial wall-thickness variations from longitudinal variations, including periodic changes associated with the piercing process.

The digital-twin approach decomposes the measured wall-thickness data into radial, longitudinal and cyclical components before reconstructing a complete wall-thickness map of the product. By separating the radial component, the system generates an average wall-thickness profile along the product length. The complete reconstructed map is then used to determine the corresponding minimum and maximum wall-thickness profiles.

The ability to routinely obtain minimum and maximum wall-thickness profiles is important for both quality assurance and process optimization. A product that appears acceptable when assessed only by its average wall thickness may still contain a localized thin region that affects performance or falls outside dimensional tolerances. The digital-twin analysis therefore provides a more complete representation of the product and supports more informed process-control decisions.

New standard for hot tube and pipe production

For more than 25 years, Tecnar has continuously advanced laser-ultrasonic technology from its research origins at the National Research Council Canada to a mature industrial solution. Successive developments in lasers, optical detection, automation and data processing have expanded the performance, reliability and measurement range of the Lut system.

"After 25 years of continuous development, Lut is becoming the new standard for non-contact dimensional measurement on hot-formed metal products," said Mr. Alexandre Nadeau, CEO of Tecnar. "This progress has been made possible by sustained research, visionary customers and the commitment of our teams in China and Canada."

The Baosteel project confirms this transition. By integrating four Lut DPS systems directly into the measurement and control architecture of two new seamless tube lines, Lut is being adopted not as a specialized alternative, but as a standard platform for advanced hot tube and pipe production.

About Tecnar

Tecnar develops and manufactures laser-based measurement systems for industrial process monitoring and quality control. Its Lut systems provide online non-contact ultrasonic wall-thickness measurements, outer diameter measurements and temperature measurements of hot and moving products in the metals industry. The systems are designed for integration into industrial mill environments and can provide dimensional data for operator monitoring, quality control, production databases and process optimization.

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Tenaris

Tenaris Announces CEO succession

Tenaris S.A. (NYSE and Mexico: TS and EXM Italy: TEN) ("Tenaris") announced today that its Board of Directors appointed Gabriel Podskubka as Chief Executive Officer. Paolo Rocca will continue to serve as Chairman of the Board.

The members of the Board would like to express their profound gratitude to Paolo Rocca for his outstanding leadership in building Tenaris into the clear global leader that it is today, and is pleased that Paolo will continue to serve as Chairman. Since even before Tenaris became a public company in 2002, Paolo has shown a remarkable vision in creating a unified company providing critical and uniquely differentiated products and services to customers in the energy industry. He has been the architect of the continuous growth of the company over the past 25 years, during which he has reinforced the solid industrial values which are the foundation of its success.

The appointment of Gabriel Podskubka reflects the culmination of a long-term leadership planning process, and the Board joins Paolo in wishing every success for Gabriel in his new role.

Mr. Podskubka has served as Tenaris's Chief Operating Officer since 2023, coordinating sales and marketing, supply chain and production operations, and product and service development. He joined Tenaris in Argentina in 1995 and has held leadership positions across marketing, commercial and industrial functions, including heading Tenaris's Eastern European operations in 2009 and serving as president of its Eastern Hemisphere operations from 2013 to 2023.

Tenaris is a leading global supplier of steel tubes and related services for the world's energy industry and certain other industrial applications.



Gabriel Podskubka

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Lightweight Components manufactured from Steel Tube

Modern and innovative forming processes unlock the potential of simple tube stock and transform it into efficiently manufactured lightweight components.

Tube forming offers efficient solutions for manufacturing lightweight components. A wide range of forming processes and process combinations can be used to create components that cannot be produced by conventional machining methods, or only at very high cost - for example, by joining several parts. Tube is particularly well suited as a starting material for hollow, elongated components such as shafts, axles or stabilizer bars. By producing parts close to their final contour (near-net-shape), chip cutting operations are reduced to a minimum accompanied by weight savings up to 50%. Reduced material input and lightweight design significantly improve the CO₂ footprint along the entire production chain, from raw material to the final product, and its life cycle.

Both hot and/or cold forming processes can be used:

- After partial heating of the tube ends, axial (hot) upsetting produces significant wall thickening and material accumulation, up to full closure of the tube. Complex shapes and contours can be formed by multi-stage die forming in one operation.
- Precision rotary swaging (cold) reduces tube cross-sections radially and, when performed over mandrel, enables elongation, wall thinning, and internal contouring of the material. Within feed-type machines, processing starts from the tube end. With recess swaging machines, reductions can also be applied at any position including steep transitions. The production of non-circular geometries is also possible like double-D or hexagon shape.
- Axial forming operations enable the production of complex contours and inner and outer profiles, such as splines, ready for assembly without any further machining.

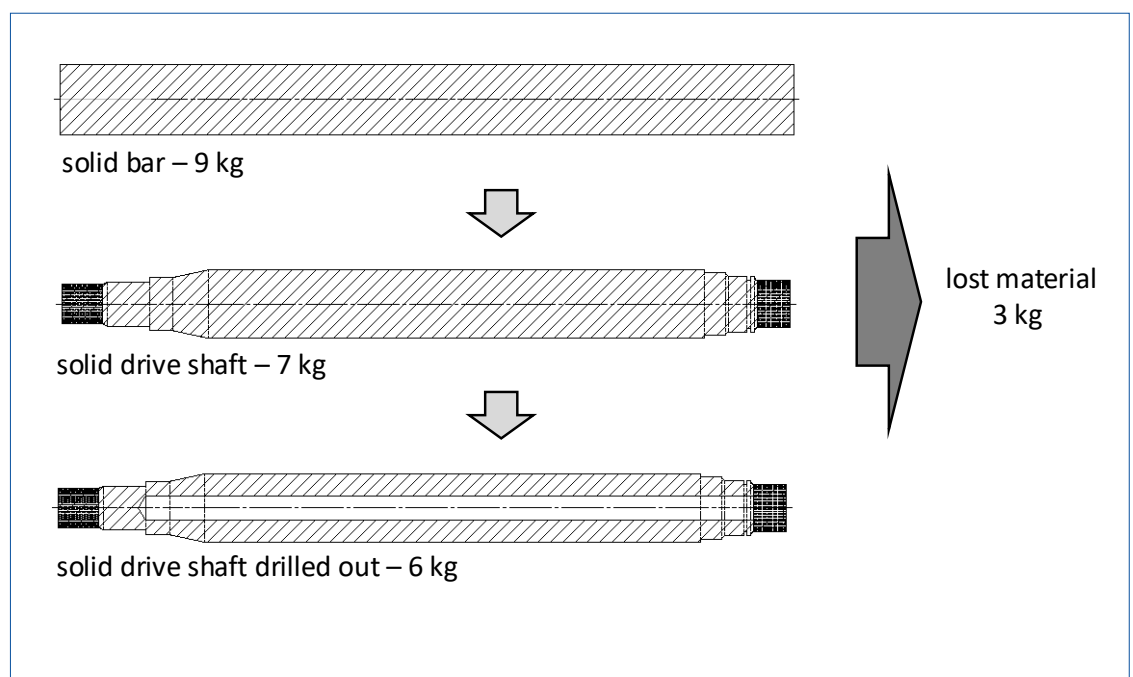


Fig. 1: Conventional drive shaft machined from solid material

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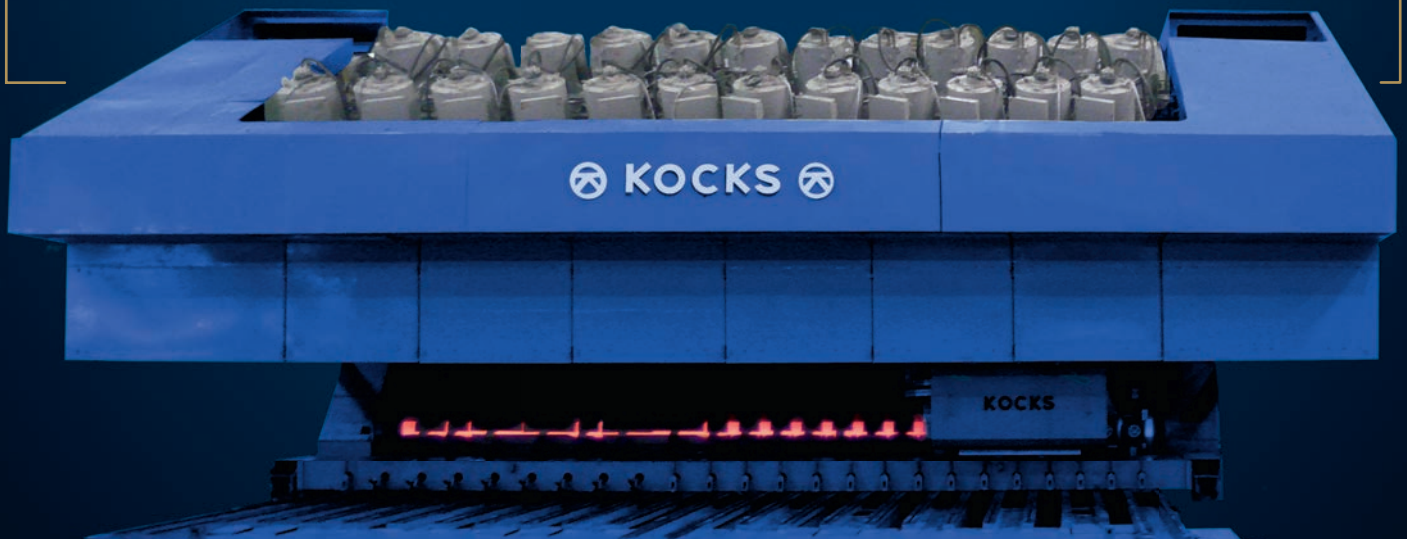
finished tube size

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inventory

100%

quality assurance
by remote control



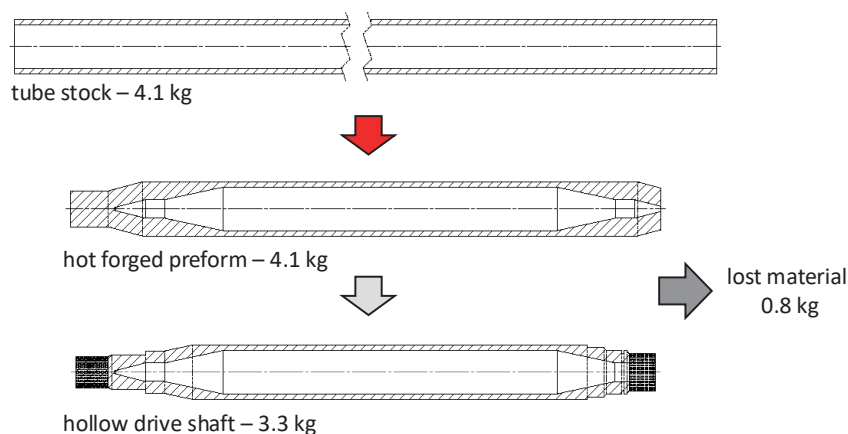


Fig. 2: Hollow drive shaft made from tube - CAD



Fig. 3: Hollow drive shaft made from tube – realized component

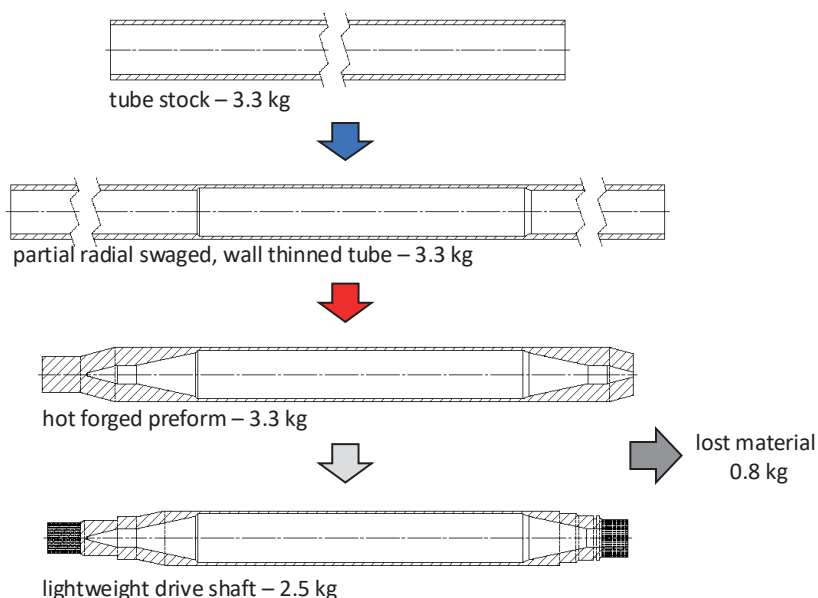


Fig. 4: Lightweight drive shaft made from wall thinned tube

A comparison of a one-piece automotive drive shaft, focusing on material input and weight is demonstrated in Fig. 1, Fig 2 and Fig. 4:

Even today, drive shafts are often machined from solid bar. In the present example, the required blank weight is 9 kg of high-grade quenched and tempered steel. Despite a material removal rate of more than 30%, the resulting weight still remains high.

In addition, the directly associated energy consumption and CO₂ emissions are high. Therefore, particularly for high-volume components forming operations should be used instead. Fig 2 shows the same part of Fig. 1, but now using appropriate tube material in combination with forming operations for local thickening and end reduction. The initial blank weight of the drive shaft can be reduced to more than 50% (4.1 kg)

As a result of the hollow near-net-shape design, both, the final component weight and the material waste are significantly reduced. Additional machining by subsequent drilling to create the hollow section inside is eliminated entirely. Fig. 3 shows lightweight drive shaft (link shaft) manufactured from tube and formed by hot forging with final machining.

If required, additional material and weight savings can be achieved by applying additional forming operations. The central section of the shaft serves solely for torque transmission and can therefore be designed with a reduced wall thickness. This is made by prior partial wall thinning - using rotary swaging and elongation over mandrel - without generating additional chips or material waste. (Fig. 4)

By combining cold and hot forming processes the component weight can ultimately be reduced to as little as 2.5 kg in this example, without losing any functionality. Despite this substantial weight reduction, machining-related material losses are reduced by more than half. Even a welded 2- or 3-piece design cannot achieve a higher degree of weight or material savings for a component of this type.



Fig. 5: Rotor shaft for cars



Fig. 6: Transmission shaft for trucks/buses



Fig. 7: Rod bodies for aircraft

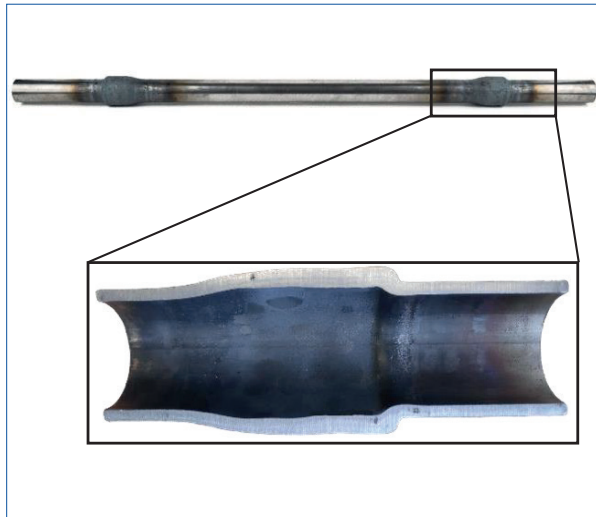


Fig. 8: Stabilizer bars for cars and trucks

Besides drive shafts (used as longitudinal, side, or intermediate shafts), there are many other potential applications in the automotive and aerospace sectors. Fig. 5–9 present a selection of lightweight components that have already been realized using these innovative forming processes.

At a time of increasing demands like

- resource efficiency
- material savings
- emission reduction
- shorter production cycle time

and overall cost reduction, hot and cold forming of tubular components becomes more and more important.

TubeFormTec GmbH, based in Karlsbad-Langensteinbach, Germany, is specialised in customized solutions for innovative tube forming processes and support its customers from initial product and process development through prototype production, industrialization, and series production. To bring these solutions into large-scale production, we are seeking suitable industrial partners.

In the beginning there were primarily research and consulting projects regarding hot and cold forming technologies with prototyping and low volume production. In the meanwhile, there are many forming machines available, some of them two or more times of similar types. This is the reason



Fig. 9: Further shaft-shaped components

why TubeFormTec is now looking for a globally positioned partner for high volume projects. The final design and manufacturing processes can furthermore be developed in Germany, while the sister machines can be transferred to the new partner company for high volume production.

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Wuppermann AG

Kai Marwig takes over as Managing Director at Wuppermann in the Netherlands

Kai Marwig has been the new Managing Director (Operations) at Wuppermann Staal Nederland B.V. (WSN) since 1 May 2026. He heads the Wuppermann Group's Dutch production site, which galvanizes and processes wide strip, alongside Commercial Managing Director Terry Flokstra.

Kai Marwig most recently headed the Business Development & Communications department at Wuppermann AG in Leverkusen for over six years. The business administration graduate has been with the Wuppermann Group for more than eleven years in total. Prior to this, he worked in the Strategy department of Siemens AG, Mechanical Drive Business Unit. Kai Marwig completed his studies in Business Administration in Münster and Essen.

"We want to strategically and organisationally position WSN for a future with increasing demands for integrated, digitalised and performance-oriented processes at our

production sites. Kai Marwig brings extensive experience in precisely these areas and already knows WSN very well," explains Oliver Rechtsprecher, CEO of Wuppermann AG.

"I am very much looking forward to this new role and to working with the team at the Moerdijk site. I already know many of my colleagues well, and I have worked closely with Terry Flokstra in particular on various projects in the past," adds Kai Marwig.

Wuppermann AG

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Tube Düsseldorf 2026

An industry ready for the future: compelling solutions for new global applications



Düsseldorf
13-17 April 2026



Massive geopolitical challenges, disrupted supply chains, high tariffs and scarce raw materials. Yet the Düsseldorf Fairgrounds were buzzing with activity. People were discussing, developing and rethinking. Here, an entire industry demonstrated its unwavering determination to actively shape the future and break new ground.

Resilient materials are needed, including for the defence industry; the market requires reliable producers and is relying on new supply chains. This is where wire and Tube, as powerful industry platforms, came in at just the right time. The defence sector is gaining in importance; new visitor groups flocked to the exhibition stands, finding concrete solutions for high demands on materials and quality. Added to this was a supporting programme featuring exciting premieres. The trade fair as a vibrant industry event: tradition and the future go hand in hand in Düsseldorf. 2,600 exhibitors from 65 countries – proof of international appeal and a clear claim to leadership.

Alongside this, the entire value chain was showcased across some 119,000 square metres in 16 exhibition halls. The focus is always on the future: artificial intelligence, robotics, renewable energies and the energy transition were not just buzzwords, but lived reality.

Trade fair visitors came to Düsseldorf from 130 countries, with traditional and entirely new target groups flocking to the exhibition halls in equal measure. What remains is more than just a successful trade fair event; it is a feeling: this is where the future is taking shape. From 3 to 7 April 2028, wire and Tube are ready to continue their success story in Düsseldorf. www.wire.de; wwwTube.de, LinkedIn: <https://www.linkedin.com/showcase/wire-and-tube-leading-international-trade-fairs/>.





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Guidance in Changing Markets: The ITAtube Forum 2026



16 April 2026

Current market information, regional perspectives and technical innovations were at the centre of the ITAtube Forum on 16 April 2026. Once again very well attended, the event built on the success of 2024 and provided international visitors to Tube Düsseldorf with a platform for information and open exchange.

How is the global tube market developing, and what challenges is the industry facing? These questions occupied many companies during Tube Düsseldorf 2026. Interest in the ITAtube Forum in Hall 1 was correspondingly high.

Following the successful forum in 2024, the International Tube Association once again put together a programme combining market analyses with technical developments from its member companies. Numerous trade visitors took the opportunity to obtain information directly at the exhibition and exchange views with experts.

The forum was divided into two parts. The morning focused on international markets and concluded with a panel discussion. In the afternoon, ITA member companies presented current technical solutions.

A global market with regional differences

The event opened with a global market overview by Dr Gunther Voswinckel, President of the ITA and Managing Director of VOSCO Management Consultants. According to the available estimates, global tube production rose by around ten per cent in 2025 to approximately 178 million tonnes. However, this positive overall figure conceals considerable regional differences.

The United States recorded particularly dynamic growth of around 29 per cent, while India grew by approximately 94 per cent. Europe, by contrast, achieved growth of about three per cent and continued to face pressures from high energy prices as well as the EU Emissions Trading System

and the Carbon Border Adjustment Mechanism. China continued its recovery, while the CIS countries experienced weaker development.

The subsequent presentations explored these regional perspectives in greater detail. Dr Heinz-Jürgen Büchner, Commodity Consultant, examined developments in Europe and Asia. Donald Gibeaut, Vice Chairman of the ITA and Principal at Integrity Industries, focused on North and South America. Swastik Das of Rystad Energy analysed developments in the Middle East.

From presentations to open discussion

Following the presentations, the speakers came together for a panel discussion in which the regional developments were considered in relation to one another. Cost structures, political decisions, trading conditions and investment priorities affect not only companies within individual markets, but increasingly also international supply chains and competitive positions.

The discussion also provided an opportunity for questions and comments from the audience. This direct exchange is an important element of the ITAtube Forum. Market information becomes even more valuable when its background and potential consequences can be discussed with specialists.

The strong interest in the morning session confirmed the demand for up-to-date market information accompanied by expert analysis. In a rapidly changing economic and political environment, the forum offers guidance and brings international expertise together in one place.

Innovations from ITA member companies

In the afternoon, the focus shifted to technical developments from ITA member companies. Ansgar Noll of GL Control presented 3D laser inspection for tubes, which can help identify quality deviations at an early stage. Matthias Kramer of MSG Solutions demonstrated how retrofitting can increase

the efficiency and service life of existing equipment while conserving resources.

Donald Gibeaut spoke about the heat treatment of seamless tubes in modern finishing lines. Michael Moist of Magnetic Analysis Corporation discussed the potential of data-driven processes in non-destructive testing. Gennaro Valzer of Danieli presented advanced technologies and services for the production of seamless and welded tubes.

Together, the presentations provided a concise insight into current developments within the industry. Digitalisation, modern inspection technology, retrofitting and advanced production equipment share a common objective: to make manufacturing processes more reliable, efficient and sustainable.

A platform for the tube industry

The ITAtube Forum 2026 was once again very well attended and successfully built on the event held in 2024. The level of interest confirmed the value of the format: combining market information, regional expertise, technical practice and personal exchange

offers trade visitors a tangible benefit during the exhibition.

For the ITA, the forum also reflects its role as an international platform for the tube industry. The Association brings together specialists, companies and decision-makers, makes knowledge accessible and creates space for discussion of the issues currently shaping the industry.

The ITA would like to thank all speakers and the participating companies VOSCO Management Consultants, Rystad Energy, Integrity Industries, GL Control, MSG Solutions, Magnetic Analysis Corporation and Danieli. Thanks also go to the many visitors whose questions and active participation contributed to the success of the forum.

Following the successful events in 2024 and 2026, the ITAtube Forum has further established itself as an important part of Tube Düsseldorf. Particularly in changing markets, the value of a format that brings together specialist knowledge, practical experience and international perspectives becomes clear.



Tube Düsseldorf 2026 – High Potential day

High Potential Day: From the Lecture Theatre to the Exhibition Floor



**Tube Düsseldorf
16 April 2026**



As partner of Messe Düsseldorf, ITA guided 40 students through Tube Düsseldorf 2026. Developed together as a new format, the programme included a lecture at the ITA stand, conversations with companies and, for the first time, a guided tour leading to the High Potential Area.

For 40 students, High Potential Day on 16 April 2026 began at the South Entrance of Messe Düsseldorf. The International Tube Association and Messe Düsseldorf welcomed the group. As a key partner of the trade fair, ITA worked closely with Messe Düsseldorf to offer its young guests more than a ticket and a map of the halls: together, they wanted the group not simply to visit wire&Tube, but to gain an accessible introduction to this diverse international industry.

High Potential Day is aimed at students, trainees, graduates and young professionals. It brings them into contact with companies from the wire, cable and tube industries, combining careers information with the experience of attending the trade fair itself. For ITA and Messe Düsseldorf, it therefore made sense to jointly complement the general trade fair visit with a coordinated programme of their own.

The first stop was the ITA stand in Hall 1. Prof. Dr. Andreas Moerke of Hochschule Worms - University of Applied Sciences delivered an open lecture at the ITA stand. The unusual setting was very much part of the concept: rather than discussing a trade fair only afterwards, the students were able to connect their observations on site with their studies. The lunch that followed provided time for conversation before Albert Sedlmaier, Chairman of the ITA European Management Board, welcomed the group on behalf of the Association.

The group then set off through the exhibition halls. At selected companies, the students gained insights into different areas of the tube industry, its products and processes, as well as potential professional roles. The tour continued across the exhibition grounds to the North Entrance, where the High Potential

Area - run by Messe Düsseldorf - served as the central meeting point for the day.

A guided tour developed jointly, for the first time

For the ITA and Messe Düsseldorf, this guided tour was a first - and a result of close cooperation. The thinking behind it was straightforward: a major international trade fair has a great deal to offer, but it can also feel overwhelming on a first visit. Anyone unfamiliar with the industry's companies, processes and products will see many machines and exhibition stands without always being able to place them in context. By combining Messe Düsseldorf's experience in running High Potential Day with the ITA's specialist industry knowledge, the two partners created a shared route with prepared stops that provided orientation while still leaving students free to form their own impressions and ask their own questions.

Lisa, 21, described her experience as follows: "Without the guided tour, I would have been totally lost at such a large trade fair. It made the whole visit really interesting."

The tour gave the students a framework for the day. At each stop, they learned what the companies produce, which professions are in demand and what entry opportunities are available. They encountered the technology not only in a presentation or on a website, but in the setting of a live world-leading trade fair - explained by people who work with it every day.

This made the conversations more concrete. They were not solely about vacancies, but also about fields of work, production processes and the transformation of the industry. Automation, digitalisation and sustainability are not merely technical issues. Behind every new machine and every improved process are people who plan developments, put them into practice and continue to refine them in day-to-day operations. In this setting, the range of possible career paths becomes far more tangible for students than it is in a job description.



Two ways for students to take part

The 40 participants in the joint ITA and Messe Düsseldorf programme were not the only young visitors at High Potential Day. Separately, about 150 students made use of the free trade fair ticket provided by Messe Düsseldorf. These figures represent two different forms of participation: the free ticket enabled students to visit the fair independently, while the jointly developed programme gave one group a structured schedule, a specialist introduction and personal guidance.

At the end of the tour, in the High Potential Area at the North Entrance, visitors could find out about employers, applications and career paths. High Potential Day, organised by Messe Düsseldorf, also offered a free CV check, a live job wall and the High Potential Job Trail. Participating companies were identified accordingly at their regular exhibition stands.

Alongside High Potential Day, the ITA also held the ITAtube Forum 2026 on 16 April. A separate article in this issue of ITAtube Journal provides a detailed review of the international market and technology forum.

A first step

With 2,600 exhibitors from 65 countries and more than 52,000 visitors from 130 countries, wire & Tube once again demonstrated the international importance of the wire, cable and tube industries. Such figures can initially seem abstract to students. During the tour, they became faces, products and potential workplaces. At the same time, the companies were able to hear the questions young people have about the industry and what they expect from a future employer.

The new format was a pilot, to give one group of students more structure during High Potential Day. Lisa's feedback indicates that



the guidance was helpful. For the participating companies, the day also provided a good opportunity to start conversations with potential future employees at an early stage - without the distance of a formal job interview and with their own technology directly in view.

The ITA would like to thank Messe Düsseldorf for the close partnership and joint development of this new format, Professor Dr Andreas Moerke and Albert Sedlmaier for their contributions, VDI and the companies that welcomed the group and gave the students an insight into their work.

Following this successful first edition, the question for the ITA and Messe Düsseldorf is not whether the promotion of young talent belongs at Tube. What matters is how the industry can be made more accessible to young people and which forms of support genuinely help them on their first visit to the fair. The jointly developed guided tour was a good start - and a format whose lessons can inform future events.

Participating companies:

Chr. Höver & Sohn GmbH & Co. KG, EJP Maschinen GmbH, Hammerschmiede Jäckel Essen GmbH, KERN-LIEBERS (BRUKER-SPALECK GmbH), LOI Thermprocess GmbH, Mannesmann, Master Fluid Solutions WDG GmbH, RSA cutting technologies GmbH, SMS group GmbH

Kallanish

Kallanish Global Flat Steel 2026 Returns to Istanbul for its 8th Edition



Kallanish is delighted to announce the 8th edition of its Global Flat Steel conference, taking place on 23 September 2026 at the prestigious Çırağan Palace Kempinski, Istanbul, Türkiye.

"In today's rapidly changing steel market, there is no substitute for meeting face-to-face. Global Flat Steel 2026 will bring together industry leaders from around the world to exchange insights, build new relationships and identify the opportunities that will shape the future of the sector," says Bijan Farhangi, Event Director, Kallanish Commodities.

This year's conference comes at a pivotal time for the industry. Record levels of Chinese flat steel exports have disrupted global pricing and trade flows, prompting an increasing number of trade defence meas-

ures around the world. Europe remains a key destination for flat steel despite subdued demand and safeguard measures, while the implementation of the Carbon Border Adjustment Mechanism (CBAM) and the EU's proposed new steel trade regime are creating fresh complexities for international suppliers.

These developments present new opportunities for lower-emission producers, including Türkiye's scrap-based electric arc furnace (EAF) steelmakers, while Europe's own expansion of EAF flat steel production continues to face challenges related to clean energy infrastructure, scrap processing capacity and low-emission metallics supply.

Elsewhere, India's growing blast furnace-based flat steel production is seeking



alternative export markets as CBAM reshapes global trade, while the US market continues to chart its own course with strong domestic pricing and limited import competitiveness. At the same time, weak automotive production, subdued manufacturing activity and persistent cost pressures continue to weigh on steel demand worldwide, with geopolitical tensions in the Middle East adding further uncertainty to the global economic outlook.

"The global steel market, like the wider economy, is moving away from the traditional globalised model to a fragmented, regionalised trading environment, driven by geopolitical events and concerns over national security and indigenous industrial capability. As we meet in Istanbul, rising global overcapacity has resulted in a record

number of steel trade cases globally, while energy costs and logistics disruptions stemming from the Hormuz Strait crisis are complicating operations. Emerging carbon markets are meanwhile spurring investments into low-emission steelmaking. Trading across borders may be more difficult than before, but it will remain essential to keep the global steel market

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Tube India 2026

Tube India 2026: A Growing Market Meets the International Tube Industry



Mumbai
30 Nov -
02 Dec 2026

The eleventh Tube India will bring manufacturers, technology providers, users and industry experts from around the world to Mumbai from 30 November to 2 December 2026.

India continues to gain importance for the international steel tube and pipe industry. Major investments in transport, energy, water infrastructure and industrial capacity are creating additional demand for tubes, pipelines and modern production technology. Against this background, Mumbai will once again become an important meeting place for the industry when Tube India returns to the Bombay Exhibition Center from 30 November to 2 December 2026.

The exhibition covers the entire tube and pipe value chain. Its scope ranges from raw materials, tubes and accessories to manufacturing and processing machinery, measuring and control systems, and testing equipment. Heat treatment, sawing and cutting technology, tools, rebuilt machin-

ery, pipeline and OCTG solutions, profiles, composite pipes and plastic tubes are also represented.

Tube India addresses tube producers, plant manufacturers, suppliers, distributors and industrial users. For international companies, it offers direct access to a market that is attractive not only because of its size. India is investing heavily in infrastructure, industrial modernisation and additional production capacity. At the same time, demand is increasing for more efficient processes, reliable quality assurance and solutions that reduce energy and material consumption.

Demand Driven by Infrastructure and Energy

Construction and the oil and gas sector are among India's most important markets for pipes. Further demand is being generated by projects involving railways, aviation, urban and rural water systems, irrigation, power generation, automotive manufacturing and the wider energy industry.



India is already one of the world's largest steel producers and has ambitious plans to expand its capacity further. This growth is also increasing the need for modern downstream processing, automation, energy efficiency and improved product quality. Machinery and technology suppliers therefore have opportunities to position their solutions in a rapidly developing industrial environment.

The challenge is not simply to provide more production capacity. Manufacturers are looking for technologies that enable them to monitor processes more precisely, reduce resource consumption and improve operational reliability. Digital process control, automated testing, predictive maintenance and more sustainable production methods are therefore likely to be important subjects of discussion in Mumbai.

The ITA as a Source of Technical Expertise

Technical exchange is a particularly important part of Tube India. The International

Tube Association, and especially its India Chapter, has played a significant role in bringing together specialists from tube production, plant engineering, research and industrial applications. Its involvement connects international expertise with the specific requirements of the Indian market.

The importance of this cooperation was demonstrated at Tube India 2024. The conference entitled "Emerging Opportunities for Sustainable Future in Tube & Pipe Industry" was organised by the ITA India Chapter. It was opened by Y. K. Bhatia, President of the ITA India Chapter. ITA President Dr Gunther Voswinckel also introduced the international ITA Tube Buyer's Guide.

The conference combined scientific, technological and application-oriented perspectives. Topics included earthquake-resilient structures using steel tubes, the manufacture of heavy-wall and high-strength ERW tubes, technological innovation and sustainability, heat treatment, and the production of precision steel tubes for hydraulic cylin-





ders. Another forward-looking presentation examined the development of steel line pipe for transporting hydrogen under high pressure.

Speakers from academic institutions and companies including Honda Motorcycle & Scooter India, Inductotherm India, Tube Investments of India, Tata Steel and Welspun Corp. made the conference an important link between research, production and industrial application.

A conference is also planned as part of Tube India 2026, although the detailed programme and participating organisations had not yet been announced when this article was prepared. The previous edition nevertheless demonstrated the importance of the ITA's contribution. Its technical activities add expert analysis, knowledge transfer and direct dialogue between international specialists and the Indian tube industry to the exhibition.

An International Platform

Tube India forms part of a larger group of specialist events. Together with wire India, METEC India and India Essen Welding & Cutting, it creates a comprehensive platform for tube, wire and cable technology, metallurgy, and welding and cutting processes. This combination allows visitors to examine materials, manufacturing processes and industrial applications across traditional sector boundaries.

The strong response to the 2024 edition confirmed the relevance of this concept. The four parallel metal trade fairs hosted 532 exhibitors from 22 countries and attracted more than 21,000 trade visitors. Together, they occupied approximately 38,000 square metres of exhibition space.

International participation, technical conferences and discussions between manufacturers, users and industry associations complemented the machinery and products on display. This combination of exhibition, knowledge transfer and professional networking is particularly valuable in an industry shaped by long-term investment and cooperation.

More Than a Product Showcase

For exhibitors, Tube India provides an opportunity to strengthen existing relationships in India and establish contacts with new customers, distributors and technology partners. Visitors can compare technical solutions directly and gain an overview of current developments in tube manufacturing and processing.

Investment decisions depend not only on technical specifications but also on trust, service capabilities and reliable long-term cooperation. Tube India and the activities surrounding the ITA create a shared platform for these relationships.

Tube India 2026 will therefore do more than present currently available machinery and processes. It will also show how the Indian tube industry is developing: towards greater capacity, more automated production, higher quality standards, improved sustainability and closer international cooperation.

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Budenheim

Insights Into
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**Latest Developments in
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 Additives**

Featuring
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TECHDAY AMERICA

OCTOBER 20-21, 2026
NASHVILLE

Join Us Here:



<https://marketing.budenheim.com/registration/techdayamerica2026>

Budenheim – Techday America 2026

Budenheim –Technical Exchange in Nashville

Budenheim will bring specialists from tube production, steel processing, plant engineering and process technology together in Nashville on 20 and 21 October 2026.

Scale formation, lubrication, reheating and process additives can directly affect material yield, surface quality, maintenance and energy consumption. Techday America 2026 will provide a focused setting in which specialists can discuss these issues across company and technology boundaries. Organised by the specialty chemicals company Budenheim, the event combines expert contributions, breakout sessions and informal networking.

The meeting builds on the first Techday America, held in New Orleans in 2025. Six expert presentations and discussions brought together representatives of the steel industry, with particular interest in Budenheim's new Scale Prevention for Steel platform. The response encouraged the company to continue the format in the Americas.

Process Solutions for Steel and Tube Production

Scale is formed when steel is exposed to oxygen at high temperatures. The oxidised layer can cause a loss of steel mass and require additional surface treatment, cleaning and maintenance. Budenheim's Scale Prevention for Steel initiative is intended to reduce scale through process and application solutions. According to the company,

this can help conserve raw materials and water, reduce energy use and lessen maintenance requirements. The platform is being developed in cooperation with SMS group.

The technical exchange on 21 October will also cover recent lubricant developments, more environmentally compatible process solutions, scale prevention for seamless tubes and reheating processes, and titanium applications. The aim is to consider individual process steps in the context of the wider production chain.

Expertise and Direct Dialogue

The programme features contributions from Bemers, Deutsche Edelstahlwerke (DEW) and the International Tube Association. Possible additional contributions are expected from SMS group, Danieli Centro Tube and roll manufacturers. Together, they represent perspectives from process chemistry, steelmaking, tube production, equipment engineering and industrial application.

A get-together at 8.00 p.m. on 20 October opens the event. The following day begins with a welcome at 8.30 a.m.; the technical exchange runs from 9.00 a.m. to 1.00 p.m. A flying lunch, an afternoon activity and dinner complete the programme. Dedicated breakout sessions will give participants an opportunity to discuss individual production conditions and possible solutions in one-to-one meetings. Registration: marketing.budenheim.com/registration/techdayamerica2026.

Global Steel Summit 2026

Global Steel Summit 2026 to unite international industry leaders in Dubai



Dubai
28-29 Oct 2026
The Great Ballroom
Le Meridien
Dubai



Global Steel Summit
2026
Registration

The fourth Global Steel Summit will take place on 28–29 October 2026 at Le Méridien Dubai Hotel & Conference Centre. More than 1,000 delegates from over 40 countries are expected to attend, underlining the summit's growing importance as an international meeting point for the steel industry.

The two-day event will bring together steel producers, processors, traders and stockholders as well as technology suppliers, industry associations, policymakers, investors and major steel consumers. By connecting representatives from the Middle East, Europe, Asia, Africa and other regions, the summit provides a neutral platform for discussing the challenges and opportunities shaping the global steel market.

Key topics will include changing international trade flows, geopolitical tensions, tariffs and protectionism, overcapacity and the future competitiveness of steel-producing regions. Sustainability and decarbonisation will also feature prominently, alongside innovations in steel production, processing and material efficiency. Particular attention will be given

to the requirements of major customer industries, including energy, oil and gas, construction and infrastructure.

The programme will combine expert presentations and panel discussions with technical and commercial seminars. Networking sessions will offer participants the opportunity to establish new contacts, exchange market intelligence and explore international business partnerships. The summit will also include an exhibition, industry awards and signing ceremonies for cooperation agreements between companies and organisations.

Among the speakers will be Dr. Gunther Voswinckel, President of the International Tube Association (ITA). His participation will ensure that the interests and perspectives of the international tube and pipe industry are represented in Dubai. Tubes and pipes are essential components of global energy and infrastructure systems and are gaining further strategic importance through investments in hydrogen networks, carbon capture and storage, renewable energy and modern urban infrastructure.

As a globally active industry association, the ITA promotes technical development, professional education and international cooperation throughout the tube and pipe sector. Dr. Voswinckel's contribution will complement the summit's broader examination of market trends, technological transformation and the future of international steel trade.

With its combination of strategic debate, technical expertise and business networking, the Global Steel Summit 2026 aims to strengthen cooperation across the steel value chain and help the industry navigate a period of far-reaching economic and technological change.

Further information:
www.globalsteelsummit.com



Dr. Gunther Voswinckel

Events for Business, Technology, Education and Networking

Diary of world class tube events

September 2026

21 - 24 Tube China www.messe-duesseldorf.de/de/Tube_China

23 - 24 Green Steel World Conference www.greensteelworld.com

October 2026

14 - 15 Stainless Steel World Asia www.stainless-steel-world-asia.com

28 - 29 Global Steel Summit www.globalsteelsummit.com

November/December 2026

30.11 - 02.12. Tube India www.tube-india.com

February 2027

Tube Mexico www.wire-tube-mexico.com
(registration open)

April 2027

Tube Eurasia www.wire-tube-mexico.com
(registration deadline 2. Oct)

June 2027

21 - 25 METEC www.metec.de

September 2027

13 - 16 FABTECH www.fabtechexpo.com

15 - 17 Tube Southeast Asia www.tube-southeastasia.com

ITA media plan 2026

Make the most
of your
ITA membership!



November/December

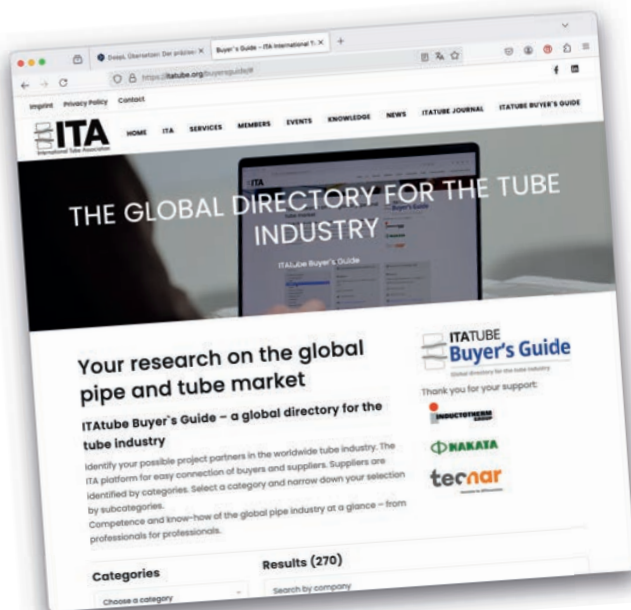
30 - 02 Tube India, Mumbai
www.tube-india.com
ITA stand tba



tba ITA Conference India Chapter hybrid at Tube India online
tba at Tube India

deadline speaker application:
September 30th, 26
deadline registration:
November 27th, 26

speaker slots
exclusive for
ITA members | free



ITATUBE Buyer's Guide

Global directory for the tube industry



ITAtube Buyer's Guide

Global directory for the tube industry

Identify your possible project partners in the worldwide tube industry. The ITA platform for easy connection of buyers and suppliers. Select a category and narrow down your selection by subcategories. This platform with free information as a matchmaker between buyers and suppliers is a great opportunity to present your products and services. Take advantage of the ITA network and get connected.

Find your business partner and present your company! Choose your package:

FREE
for ITA
corporate
members

Basic package 500€ p.a.
(company details, 1 contact person)

ONLY
200 € p.a.
for ITA
members

Additional tile for regional sub 300€ p.a.

ONLY
350 € p.a.
for ITA
members

Premium package + 500€ p.a.
(basic + logo + 2 contact person
+ 5 product pictures)

ITA – International Tube Association

ITAtube Conference 2027 – stay tuned



The global tube and pipe industry continues to experience a period of profound change, presenting both new opportunities and significant challenges.

Geopolitical developments, changing energy markets and the growing need to decarbonize industrial production are having a lasting impact on tube and pipe markets worldwide. At the same time, new investments in energy infrastructure are creating additional demand for OCTG, line pipe and other tubular products.

The construction sector also offers considerable potential. Innovative architectural and structural solutions are opening up new applications for tubes and profiles, while modern production technologies and advanced materials are supporting their wider use.

Against this background, the International Tube Association (ITA), together with its international experts and partners, is preparing the online ITAtube Conference 2027. Senior representatives from the tube and pipe industry will discuss current market developments, their commercial implications and the opportunities they create for producers, suppliers and users.

The conference will provide an international perspective, with particular attention to key markets and the challenges facing different regions of the global tube and pipe industry.

Further information on the programme, speakers and registration will be announced shortly.

We will keep you updated!



ITA Conference
2027





Imprint

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Deadline:

October 16th, 2026

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Look at our next issue:

- review Tube China
- review Tube India
- preview Tube Mexico 2027
- preview Tube Eurasia 2027



Corporate Membership Application Form

The Sole Worldwide Acting Association of Tube & Pipe Engineers

The following company applies for a Corporate Membership in International Tube Association for upto five members and agrees to pay the annual subscription of € 500 (EU VAT exempt).

☐ I / We agree on use of personal data as well as company data and logo particularly for registration on ITA website as well as for information purpose (revocable reserved).

Company Name: _____

Address: _____

Tel: _____ Fax: _____ EU VAT No. (if applicable): _____

Email: _____ Website: _____

Applicant 1 – Payee for Group	
Family Name	First Name
Job Title	
Email address	
Tel.	

Applicant 2	
Family Name	First Name
Job Title	
Email address	
Tel.	

Applicant 3	
Family Name	First Name
Job Title	
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Applicant 4	
Family Name	First Name
Job Title	
Email address	
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Applicant 5	
Family Name	First Name
Job Title	
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Authorised Signature _____

Name _____ Date _____

Brief description of company production/services:

Additional Information – Person responsible for marketing and PR (if not shown above)

Name _____ Job Title _____

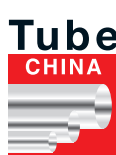
Email _____ Tel. _____

If any applicant is located at a different address to above, please advise on a separate sheet.

Please return form to:

International Tube Association • Stadtwaldgürtel 24 • 50931 Köln • Germany
info@itatube.org • www.itatube.org

Industry partner to major tube and pipe exhibitions:



With my signature I hereby accept the constitution of the International Tube Association e. V. and agree to be bound by them. Furthermore, I confirm that I have read and understood the data privacy and personal rights information. In signing, I also agree as the legal representative to uphold all demands of the Association deriving from membership.

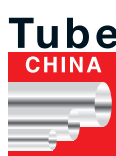
Data security and privacy rights

1. The Association collects, collates and stores personal data from its members in a data processing system in accordance with and for the fulfilment of the stated aims of this Constitution (e.g. name and address, banking details, telephone numbers and email addresses, date of birth, licenses, position within the Association).
2. By their membership and the therein implied acknowledgment of this Constitution the members agree to the collection, processing (storage, alteration and dissemination) and use of their personal data in line with the fulfilment of the statutory tasks and aims of the Association. Other use of the data (e.g. sale of data) is not permitted.
3. By their membership and the therein implied acknowledgment of this Constitution the members agree furthermore to the publication of their name, general contact details as given on the membership application form, and pictures incl. company logo in print, broadcast and electronic media, insofar as this corresponds with the statutory tasks and aims of the Association.
4. In accordance with the legal regulations of the German Federal Data Protection Act, members are entitled to information about which of their personal data has been recorded, the recipients of the data and the purposes of the recording or processing, rectification of inaccurate personal data and erasure or blocking of personal data.

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Industry partner to major tube and pipe exhibitions:





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GLOBAL FLAT STEEL 2026

23 September

Istanbul | Türkiye



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Overview

Global flat steel markets have been reshaped by record Chinese exports, weak demand and a wave of trade measures that have altered global trading flows. While the EU remains a key destination despite lower consumption, CBAM and the proposed new steel trade regime are making access increasingly difficult, creating opportunities for lower-emission suppliers such as Turkish EAF producers.

Europe's transition to EAF flat steelmaking continues to face challenges including energy infrastructure, scrap processing and low-emission metalics supply. CBAM is also driving India to seek alternative markets for its expanding blast furnace-based output. Meanwhile, the US market remains supported by strong domestic pricing, with imports still largely uncompetitive.

Against a backdrop of weak manufacturing demand, high production costs and geopolitical uncertainty, the flat steel sector continues to face significant headwinds.

Kallanish Global Flat Steel 2026 will bring together industry leaders from across the supply chain to examine these challenges, share market insights and explore opportunities for growth.



Presentations

Hear directly from 25+ experts in attendance from over 25 countries.



Networking

Come face-to-face with 200+ industry peers looking to make connections with you!

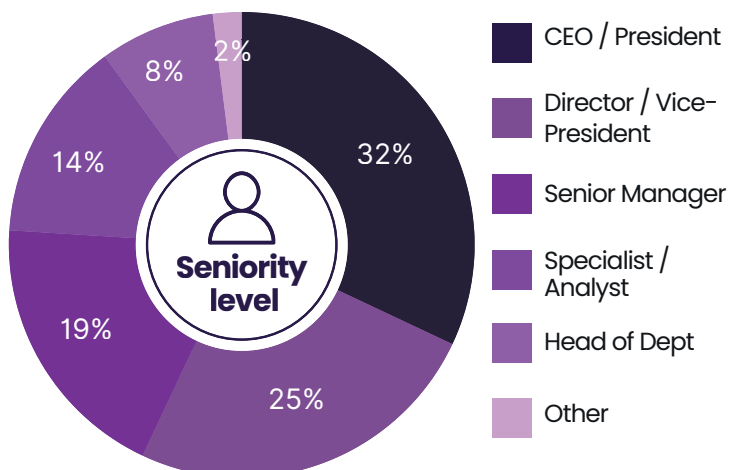


Offer

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ITA100OFF

Seniority of attendees



Business types attending

