ITATUBE Journal

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Magazine of the World's Largest & Most Influential Association of Tube & Pipe Engineers

Tube Mexico

Monterrey, Mexico

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Dr. Gunther Voswinckel
President ITA

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

Exciting times with both positive and challenging developments are experienced by the global tube and pipe industry.

Global pipe production decreased by 4% last 1st half year, but the prospects for 2025 are promising.

The geopolitical challenges as well as the demands of climate change regarding decarbonization of our industry are having a lasting impact on the global pipe market. The geopolitically risky for the oil and gas supply in middles east has eased due to the ceasefire in the Gaza conflict. The announcement of the new US government to enlarge the exploration of oil and gas “pump baby pump”, will create further demand for OCTG pipe products. The construction industry is becoming increasingly interesting, with new architectural solutions intensifying the use of tubular products.

The transformation to green steel tubes requires high levels of investment and innovative technical solutions. New pipe markets have emerged because of decarbonization. Examples include new pipelines, electromobility, carbon capture and the planned supply logistics for green hydrogen, which will require large quantities of tube products.

However, it must also be mentioned that these opportunities for the pipe industry vary from region to region, as demand has changed, and production costs are regionally quite different. The political measures must be assessed in a differentiated manner in some cases.

For plant manufacturers, technology providers and suppliers to the tube and pipe industry as well, these dynamic times naturally offer market potential that needs to be tapped into. In addition, there are increasingly more innovative solutions for improved productivity and customer benefits. These include also innovative AI-based technologies that are finding their way into the tube industry.

Innovative products and production processes guaranty sustainability and profitability of our industry.

In this light, Tube Mexico in Monterrey is taking place just at the right time to provide a platform for exchange within our tube industry.

As further service for our tube industry, the ITA has just released the ITAtube Buyer´s Guide as the global directory for the tube industry to enable buyers and suppliers to have a platform for easy matchmaking. Buyer`s Guide – ITA International Tube Association (itatube.org)

Yours faithfully

ITA Team

Table of contents

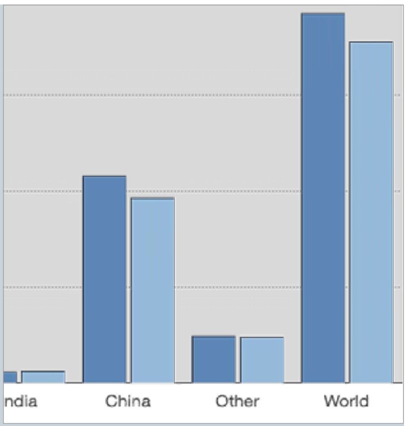
Editorial

Market information

Interview

Press Releases

Previews



World Steel Tube Production

6

Friedrich Kocks

22

Tube Eurasia 2025

28

ITA Inside

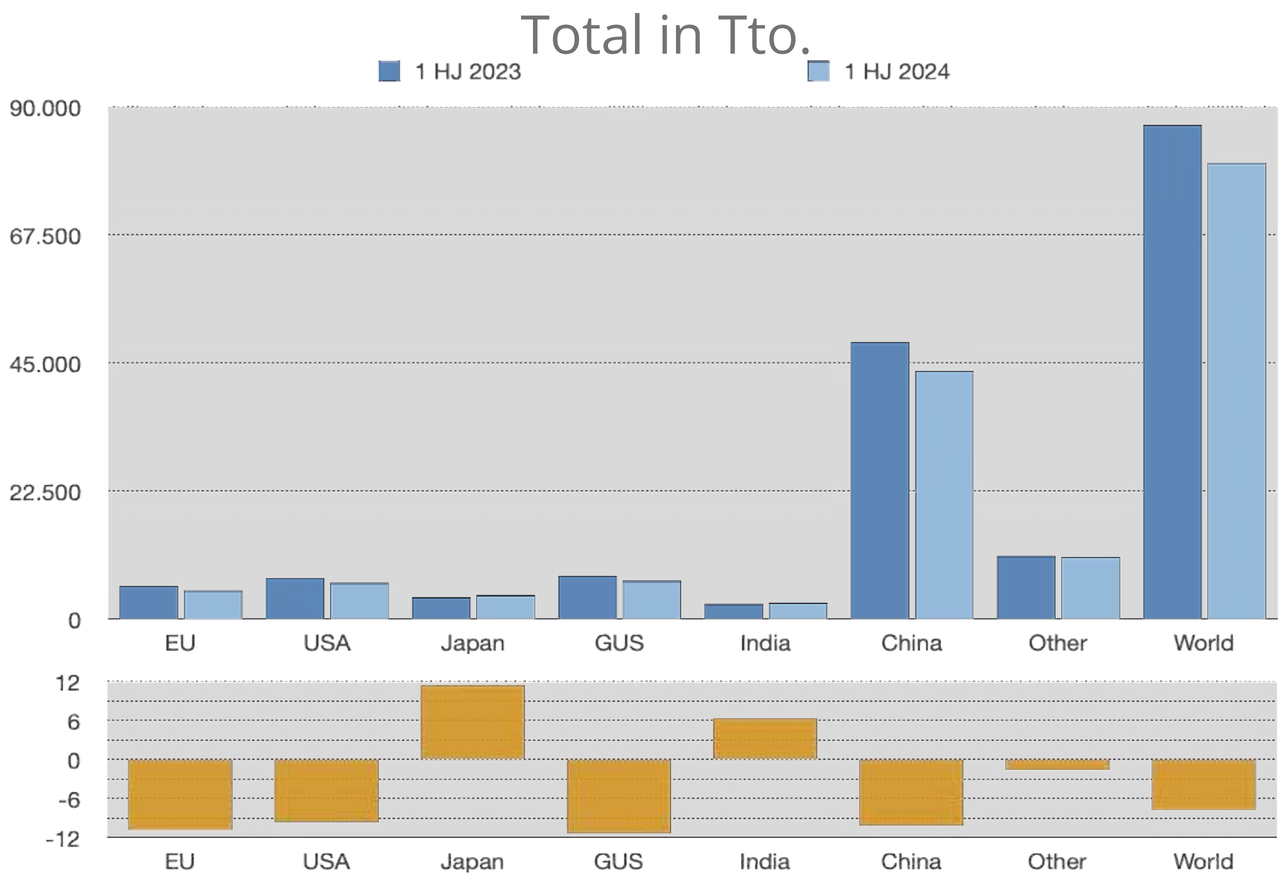
37

ITAtube Buyer's Guide

World Steel Tube Production – Review

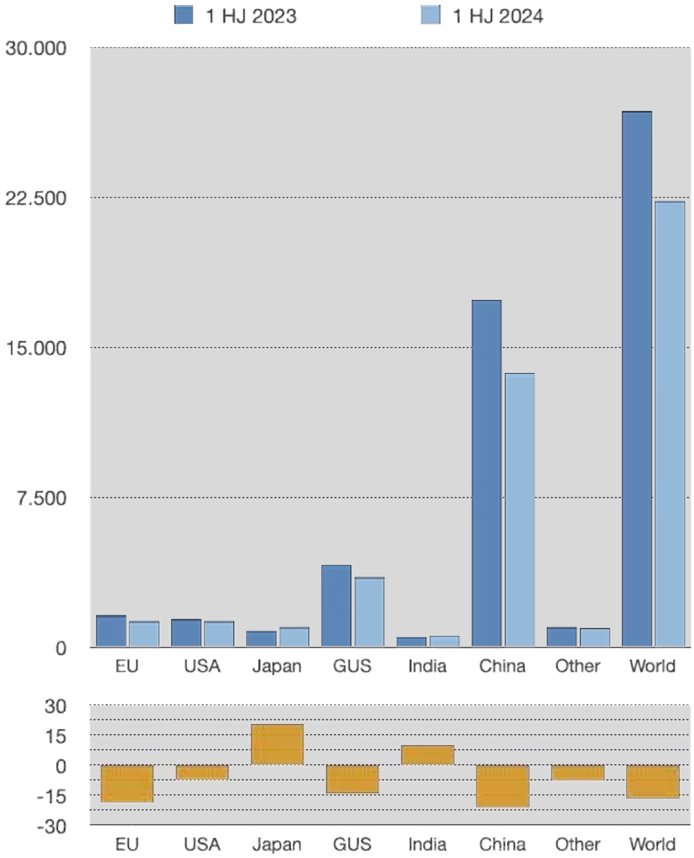
A comparison of the first two half-years of 2023 and 2024 shows a global decline in production of 7.8 %. However, the development in the individual regions and countries shows different trends. While the USA, Europe, China and the CIS countries have seen declines of around 10%, Japan (11.5%) and India (6.2%) have recorded growth. Japan recorded the largest growth in seamless pipes. The largest declines in this area were recorded in China (21%) and Europe (over 22%) for welded pipes > 406. Indian production is growing in all areas. It should be noted that the figures in the individual sectors vary greatly in some cases. For example, China recorded a decline of 21 % for seamless pipes and growth of 2 % for welded pipes > 406.

At the time of going to press, the full-year comparison for 2023 and 2024 was not yet available.

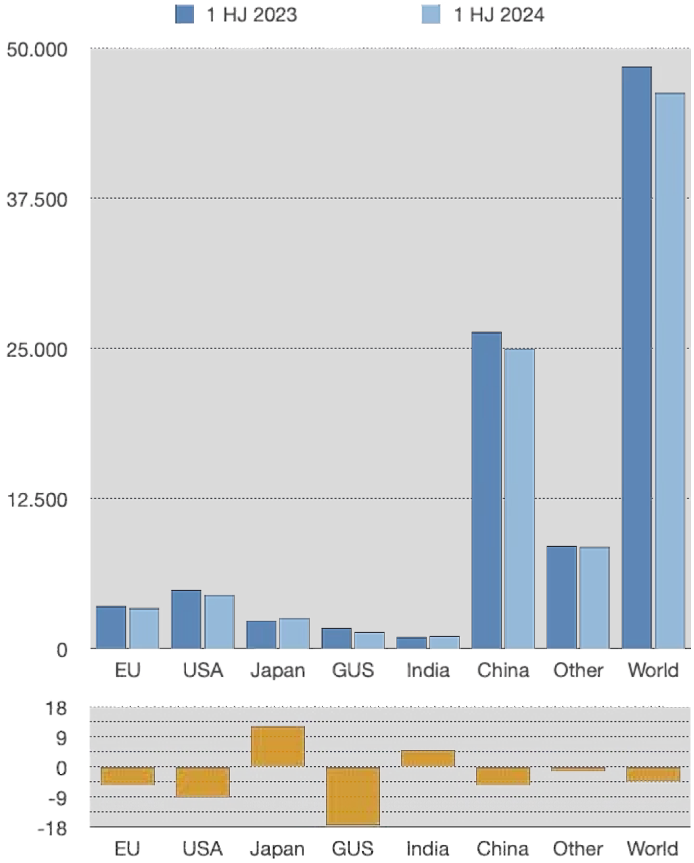


Region/ country	seamless tubes 1st half 2023	1st half 2024	in %	welded tubes <406 1st half 2023	1st half 2024	in %	welded tubes >406 1st half 2023	1st half 2024	in %	welded tubes 1st half 2023	1st half 2024	in %	TOTAL 1st half 2023	1st half 2024	in %
EU	1.600	1.300	-18,8	3.600	3.400	-5,6	580	450	-22,4	4.180	3.850	-7,9	5.780	5.150	-10,9
USA	1.400	1.300	-7,1	4.900	4.450	-9,2	900	750	-16,7	5.800	5.200	-10,3	7.200	6.500	-9,7
Japan	830	1.000	20,5	2.275	2.550	12,1	750	750	0,0	3.025	3.300	9,1	3.855	4.300	11,5
CIS	4.100	3.520	-14,1	1.700	1.400	-17,6	1.900	1.900	0,0	3.600	3.300	-8,3	7.700	6.820	-11,4
India	500	550	10,0	1.000	1.050	5,0	1.200	1.270	5,8	2.200	2.320	5,5	2.700	2.870	6,3
China	17.350	13.700	-21,0	26.420	25.000	-5,4	4.900	5.000	2,0	31.320	30.000	-4,2	48.670	43.700	-10,2
Other	1.030	950	-7,8	8.600	8.500	-1,2	1.400	1.400	0,0	10.000	9.900	-1,0	11.030	10.850	-1,6
World	26.810	22.320	-16,7	48.495	46.350	-4,4	11.630	11.520	-0,9	60.125	57.870	-3,8	86.935	80.190	-7,8

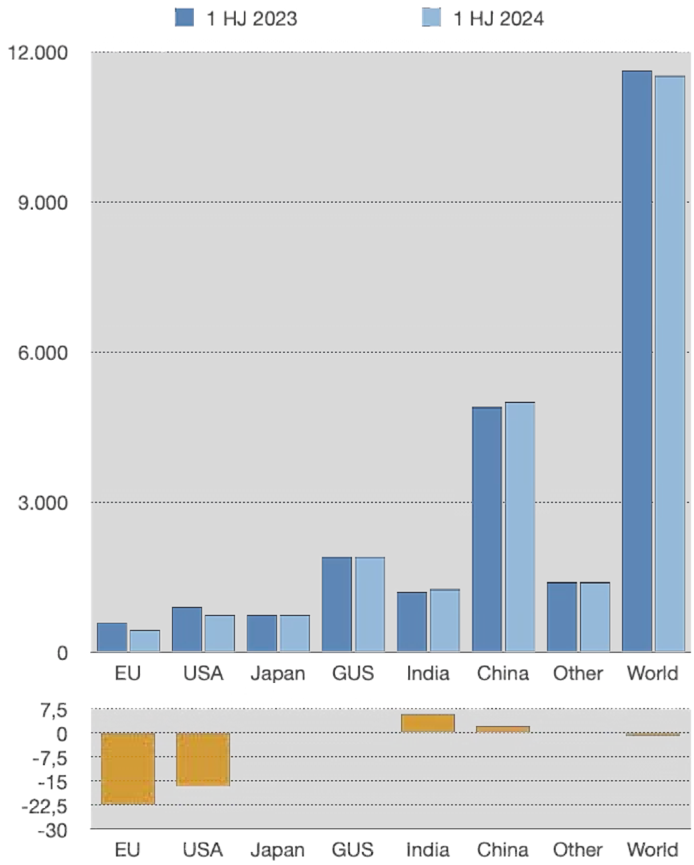
Seamless tubes in Tto.



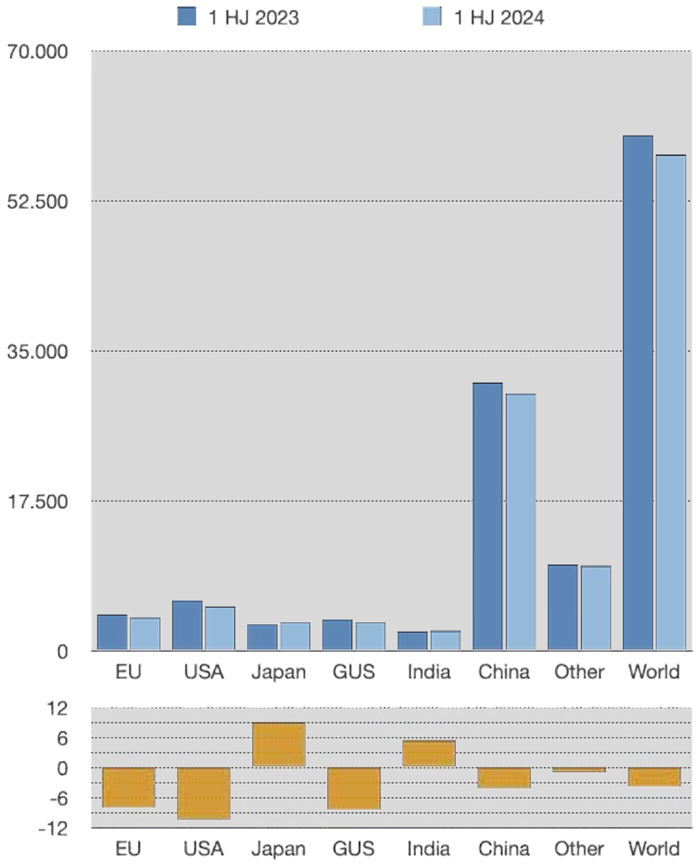
Welded tubes <406 in Tto.



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 February 2025

Welcome to ITA's and VOSCO´s regular presentation of the main worldwide economic factors influencing the tube and pipe industry.

The conflict with Israel in the Middle East appears to be calming down. Concerns about an oil and gas shortage in this region are diminishing. The new US government has declared that it will continue to expand US oil and gas production. As a result, oil and gas prices fall. Continued demand for oil and gas, its distribution, new cars, machinery and building construction, especially in GDP growth regions, as well as new emerging market segments such as CCUS (Carbon Capture and Storage) and hydrogen pipelines will maintain demand for tubular products and require larger quantities of alloyed tubes. In general, there is sufficient production capacity to meet the growing demand for tubes in all market segments. However, the trend towards customer-centred production will continue to influence the landscape for tube manufacturers. Raw material prices for the steel and pipe industry appear to have stabilised. However, the markets are nervous and there is the potential for further volatility.

A further challenge could arise if political measures to prevent climate change are not introduced in a balanced manner, which could lead to a relocation of energy-intensive industries to regions with lower energy costs. However, as the balance between supply and demand in the pipe industry has largely been restored, price volatility has calmed down.

The transition to environmentally friendly pipe production with low carbon footprint pipes has become an increasingly important task for the industry. Pipe manufacturers are converting their production facilities from gas to electricity. Geopolitical and logistical risk considerations as well as current and future energy costs are increasingly taking centre stage.

Regions such as the USA, India, Turkey, the Middle East and China are benefiting from lower energy costs. Political interventions and regulations are increasingly influencing the industry's strategies and measures. Due to the dynamic nature of current developments, it is becoming increasingly difficult for the industry to react appropriately. Some manufacturers are losing confidence in their ability to compete on the global market with their cost levels and are even reducing their involvement in Europe as a result. Some countries/regions are therefore looking for suitable political countermeasures to compensate for their cost disadvantages.

All sources of supply are being critically scrutinised, and one can only hope and warn that international trade will not suffer too much as a result.

However, disruptive times also always create new opportunities for economic success. New markets such as Carbon Capture Utilisation and Storage (CCUS), new pipelines and networks for hydrogen transport, electromobility and productivity improvements at production sites as well as improved customer service as part of the transformation to more environmentally friendly plants offer opportunities that need to be exploited.

Many technology providers have already responded to this and expanded their product portfolio to include green and digital solutions.

As stated before, the availability of economical energy is a decisive factor for the industry. Geopolitical turbulences and political regulations have changed the regional balance with increasing challenges for the industry in regions with higher energy cost. The industrial landscape of the energy intensive industry is already taking consequences, which will change the entire industrial landscape if appropriate countermeasures are not taken. The new US government, although the US already having favourable energy costs, has announced to take actions to further reduce energy cost. These announcements have already shown consequences for the electrical energy as well as oil and gas prices.

The prices for electrical energy, after turbulent periods, are very volatile and reported at levels of about 40-140 €/MWh (figure 1). In Europe the span of the average prices in January 2025 is huge between 40 – 140 €/MWh. This corresponds not only to a huge price increase in the last 20 years but also results in major economical uncertainties for the energy intensive industry! Economical production planning becomes increasingly difficult in such regions with high and volatile energy cost. Since the energy intensive industry is mostly the initial process step in the industrial production chain, this uncertainty endangers also many downstream industries with significant contribution to national GDP´s and employment rates.

Some countries with larger nuclear energy sources, like e.g. France (ab, 70 €/MWh), or other base-load energy sources at reasonable cost, still have cost advantages. Considering for example US-Texas with an electrical energy cost level of about 70-80 €/MWh is about 30% lower than most European cost levels. It will even become more unbalanced if some more European punitive regulations or network costs become effective. As stated before the new US government announces further energy cost reductions. Countries like Saudi Arabia are even offering electrical energy at 40 €/MWh or less! This widening cost gap is increasingly forcing companies to relocate their production facilities to countries with more attractive energy cost levels.

Cost of natural gas, one of the most important energy sources, had a sharp downturn in 2025 from about 4,3 to 3 USD/MMBtu (figure 2). This may also be seen in light of the announcements of the new US government stating, “Drill Baby Drill”. Experts expect an enlargement of the gas supply causing the erosion of the gas prices.

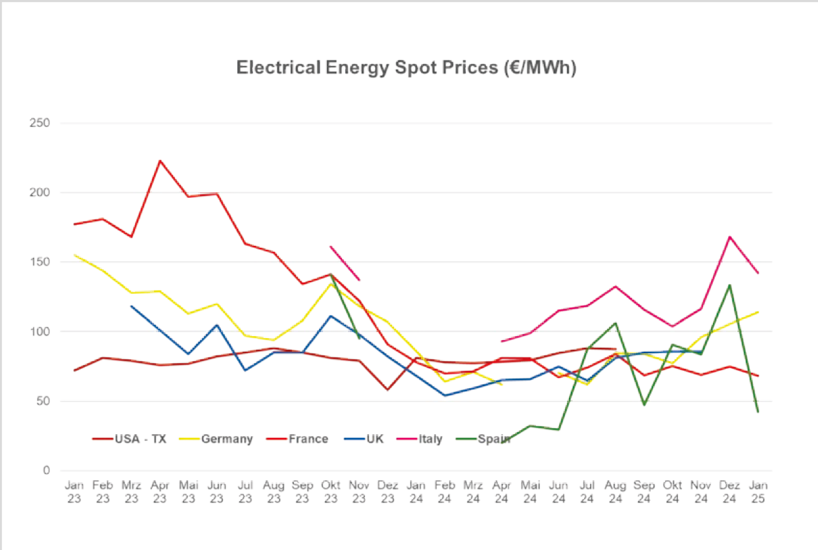


Figure 1: Selected spot prices of industrial electrical energy as per February 2025 in €/MWh
Source: Statista.com, Kallanish, com

Figure 2: Natural Gas price development as of 2nd of February 2025
Source: Trading Economics.com

Figure 3: LNG Global Price development 1 year up to December 2024
Source: International Monetary Fund, US Bureau of Labor Statistics

Figure 4: Pipelines for Natural Gas to supply Europe

Regions such as Europe anyhow nowadays depending largely on LNG (Liquified Natural Gas) are faced by far more expensive prices than normal natural gas.

LNG consumers are confronted with cost levels of about 14 USD/MMBtu which is about 470% higher than normal natural gas (figure 3). The present Chart does not show the envisaged price downturn in January 2025 as seen for natural gas. These remarkable additional costs for LNG are applicable to such regions without sufficient natural gas supply. Due to this price disadvantage LNG can only be a short-term solution to ensure the gas supply in Europe. In longer terms natural gas supply via pipelines shall be considered.

In Europe, Italy has built a natural gas pipeline from Algeria to Italy via Tunesia which was inaugurated in 2010 with a capacity of 7 billion m^3 per annum (figure 4). An extension of the Trans-Mediterranean pipeline delivers Algerian gas to Slovenia. It may be considered to enlarge the capacity.

Greece is planning to build a pipeline to connect eastern Mediterranean resources with Greece further into Italy and other European regions (figure 4). Other projects are under experts discussion to supply natural gas to Europe via pipelines at reasonable cost levels. So far the political institutions in Europe are reluctant to consider such cost saving measures.

The long-term strategy to shift towards green hydrogen to replace fossil energy sources such as natural gas, are also questioned by specialists. Hydrogen production via electrolysis in an industrial scale requires not only masses of clean water, but also a lot of electrical energy. About 55 MW electrical energy per ton of Hydrogen must be considered. Furthermore, the chemical process, the electrolysis, requires permanent electrical energy 24 hours over 7 days per week with limited power network variations. The lifetime of the electrolyse stacks is significantly reduced in case of larger power supply volatility. Therefore, green hydrogen production seems only feasible in regions with steady electrical power supply from sun, wind, water or nuclear sources. In most parts of Europe such constant power supply at reasonable cost is still hardly to be realized by the green energy sources. Norway, Sweden are possible regions for economical hydrogen production. Some specialists e.g. from OECD therefore consider producing hydrogen in regions with steady and reasonable electrical supply such as some places in Middle East or Africa. Economically transportable goods shall than be produced near the electrical source and then further processed in the industrial centres like Europe or northern Asia. DRI could so become an ideal import product which could then be further processed in electrical steel plants to a wide range of specifications. Such value chains as proposed by OECD specialists would secure most technological knowledge and employment levels for the traditional metallurgical plants. Unfortunately, such ideas are still not supported by most European politicians.

The total world tube and pipe production in first 6 months 2024 was 82,2 million tons. After the record year 2023 the market calmed down a bit again. If this production volume 2024 is extrapolated to full year, we report a world tube production cut of - 4% (figure 5).

Figure 6, shows the price development for two representative tube grades since June 2022:

- P110 OCTG O.D. 5,5" alloyed casing pipe.
- S235 non alloyed structural pipe.

The OCTG pipe price for P110, after its hight in October 2022 (ab. 3.900 USD/ton) experienced a price decline of ab. 58% until August 2024 (ab. 1.650 USD/ton) - however, since then, it seems the price has stabilized at a level of about 1.800 USD/ton.

The structural pipe S235 although on a much lower price niveau, characterized by much less volatility almost maintained its price level at ab. 600 USD/ton.

Tube and Pipe manufacturers buy hot-rolled coils, round billets, or plates as input material for their production lines. 72 % of the total world pipe production, i.e. in 2024 about 116 million tons/year, are welded tubes and pipes. Welded tube producers are therefore highly dependent on attractive hot rolled coil prices and large OD (> 406 mm diameter) pipeline producers, on plate prices. Average prices for hot-rolled coils in the US came down from January 2024 (ab. 1130 USD/ton) to February 2025 (ab. 740 USD/ton) (Figure 7). Some Countries, such as Turkey (640 USD/ton) or India (590 USD/ton) trade even lower.

Comparing the price difference between HRC and finished structural tubes and pipes type S 235 on Turkish basis, it becomes obvious how small the margins for tube producers of such products are. There are even time periods, with negative margins.

Furthermore, tube producers suffer from shortages in the availability of special tube material specifications. Special alloyed HRC as applied e.g. at OCTG tubes and pipes, are traded at significant higher prices.

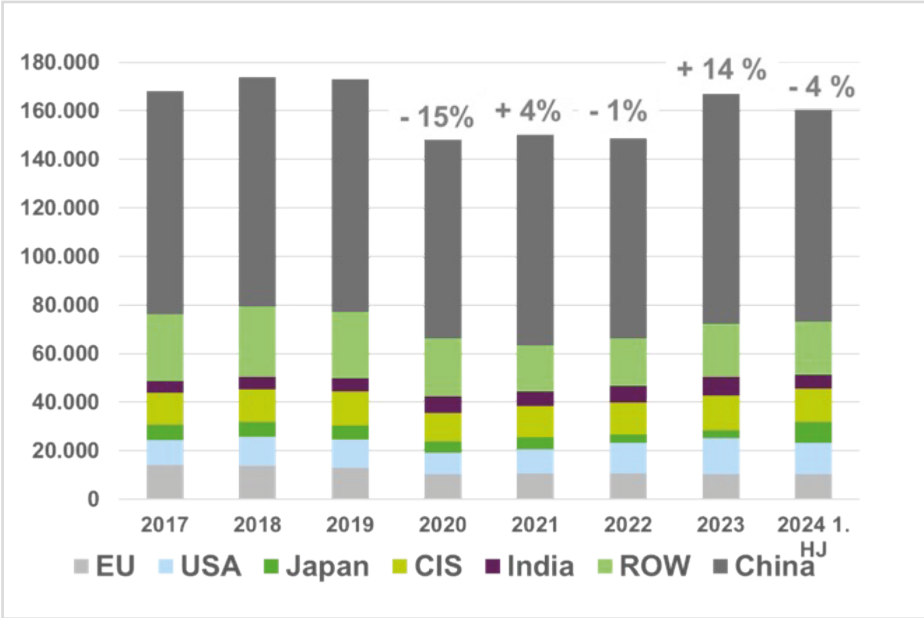


Figure 5: World Tube and Pipe Production 2017 - 2024 first 6 Months (extrapolated)
Source: Wirtschaftsvereinigung Stahlrohre, ITA

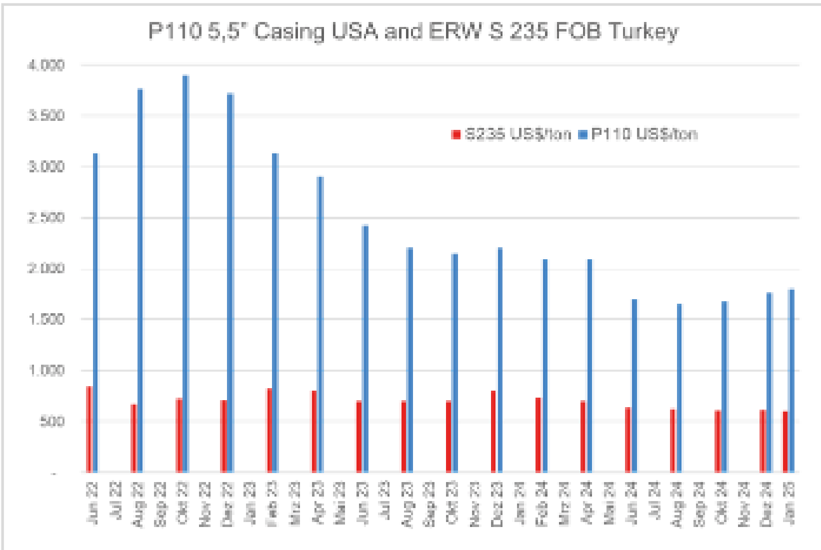


Figure 6: Representative Steel Tube and Pipe Prices (OCTG – P110 USA and Structural S235 Turkey)
Source: Kallanish.com

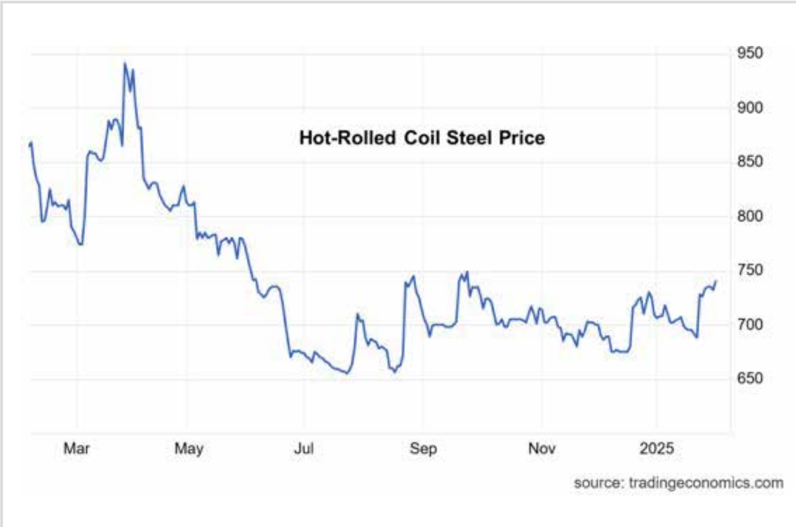


Figure 7: Hot-Rolled Coil Steel prices 1 Year until 2nd February 2025
Source: tradingeconomics.com

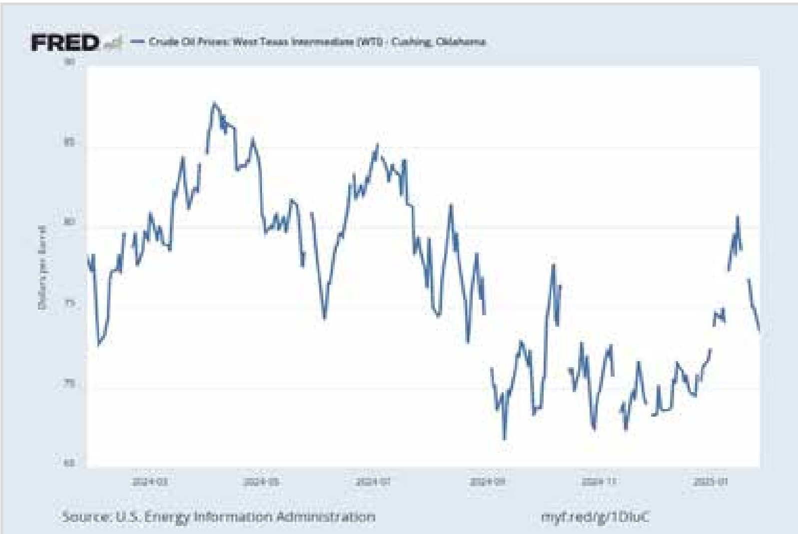


Figure 8: Oil price WTI development 1 year up to 2nd of February 2025 (US$/Bbl.)
Source: US Energy Information Administration

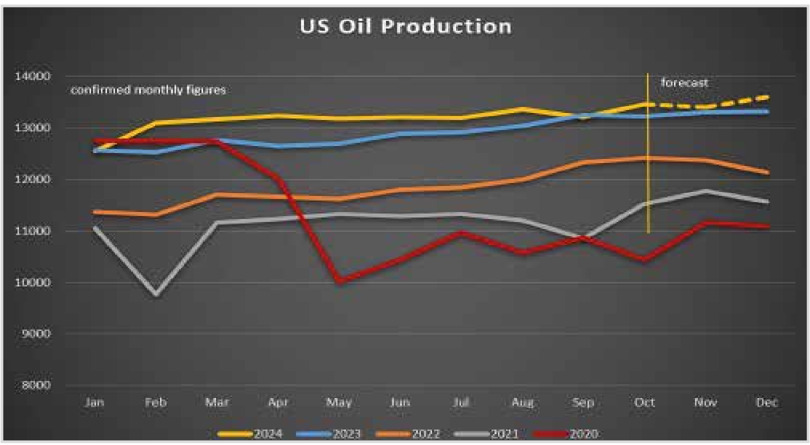


Figure 9: US Crude Oil Production as per February 2025
Source: OilPrice.com

Billet prices, applied for seamless tubes are traded for an average of around 525 USD/ton.

In 2024/2025 almost all prices for tubular pre-materials were calming down. Anyhow it remains challenging to predict the pre-material price developments.

The major driver of the tube and pipe industry is the oil and gas market representing about 51% of the world tube and pipe production. The consumption of OCTG tubes directly relates with the oil price (figure 8, see also previous tube market reviews). OPEC+ during the past years have unsuccessfully tried to keep the oil price at a minimum level of 90 USD/Bbl. by voluntary supply cuts of 2 million barrel/day. These cuts have only recently been prolonged until mid-2025 to stabilize the oil price. Anyhow the oil price WTI eroded in 2024 from April (87 USD/Bbl.) to December (67 USD/Bbl.). Announcements of the new US president were immediately reflected in oil price. Announcements to punish oil producing countries with additional oil embargos raised the oil price in January 2025 from 69 to 82 USD/Bbl. Following announcements to increase the US oil production “Pump Baby Pump” and the ceasefire in middle east let the oil price calm down again to 74 USD/Bbl. It must be observed how the new US president Trump´s announcements will affect the oil price in the coming months.

The oil price volatility anyhow ticks higher with more geopolitical risks simmering.

The USA to soften the inflation and to sacrifice the crude oil demand enlarged its crude oil production almost linear from 12 Mio. Bbl./day in August 2022 to

13,3 Mio. Bbl./day in February 2024 (+ 11%) by increasing the number of drilling rigs and their productivity (Figure 9). Since the election of the new US president, the production will even be further enlarged.

The number of US drilling rigs was enlarged to about 800 by December 2022 (Figure 10). In 2023 due to improved productivity and declining oil prices, the number of rigs was reduced until February 2025 to 584 rigs. Of these 584 rigs, 480 are dedicated for the extraction of oil and 100 for gas. The US oil exports have reached a remarkable new all-time high with about 5,5 million Bbl./day representing about 41,6% of the total world crude oil production.

Efforts to reduce dependence on fossil energy sources can hardly be successful in the short term and can only contribute in medium term. For our pipe industry, however, this means that crude oil prices can be expected for 2025 at around 70-80 USD/Bbl. unless the geopolitical situation does get out of control.

The need to secure the world energy supply will keep the demand for tubular products high. Another driving factor is the record high global LNG production. Katar, USA and Australia have record high LNG production. Consequently, the demand for OCTG products remain high. The LNG supplies ease the energy supply crisis especially in Europe to compensate the stopped Russian pipeline gas supplies, unfortunately at much higher cost.

Another interesting driver for the tube industry is related to the longevity of the tubular products applied in the oil and gas industry. Harsh environment and high concentrations of H_2S and CO_2 as well as challenging geological conditions demand for advanced materials. In the past mostly corrosion inhibitors were the main solution hereto. Now increasing demand for pipes made of CRA and clad materials are taking centre stage. These high-tech products are a great opportunity for pipe producers to create unique selling points.

Despite the current delays, the need for new pipeline projects remains high (figure 11). Geopolitical changes and economical needs require enormous investments in the distribution networks for oil and gas.

Carbon Capture Utilisation and Storage (CCUS) is another upcoming interesting market. CCUS is an important emission reduction technology, that can be applied

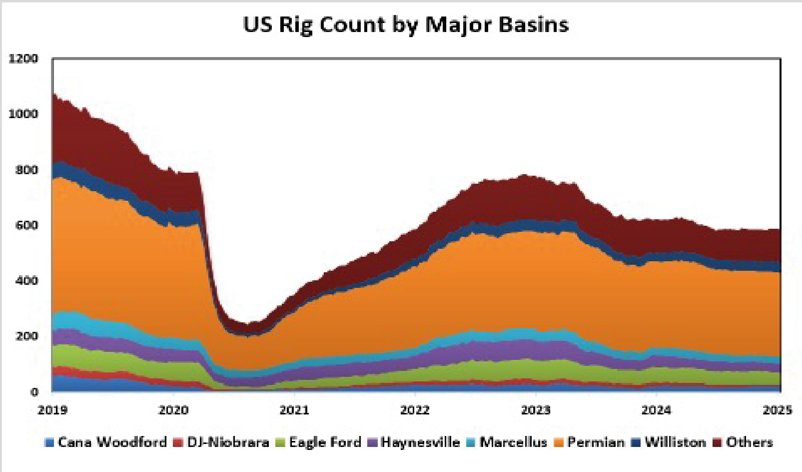


Figure 10: US Total Rig Count 5 years up to 2nd of February 2025
Source: OilPrice.com

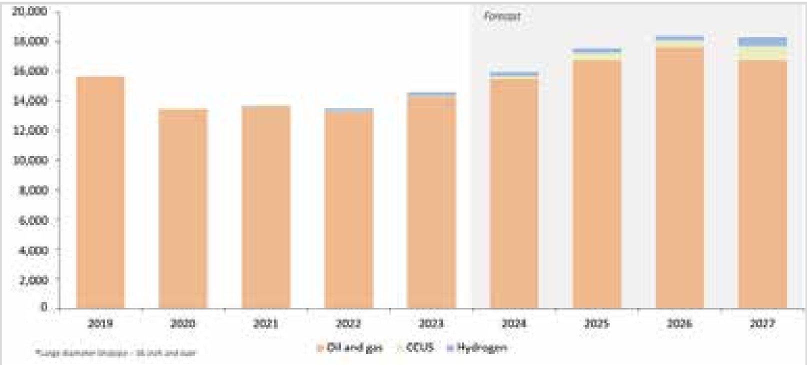


Figure 11: The Global Demand for Line pipe Market 2019-2027 (million tons)
Source: Rystad Energy

across the energy system. CCUS involves the major steps: the separation of CO_2 from other gases produced in large scale industrial process facilities, such as coal- or natural gas fired power plants, steel mills, cement plants and refineries. The captured CO_2 is compressed and transported via pipelines. CO_2 is injected into deep underground rock formations, usually at depth of 1.000 m or more. Due to the reactivity of CO_2, higher alloyed tube materials are required to prevent excessive corrosion.

CCUS will require new pipelines to allow the scalability of such technology. Pipelines can be expanded and interconnected to create CO_2 networks that link multiple sources of emissions to centralized storage locations. This network approach reduces costs by sharing infrastructure across industries, making CCUS more viable and attractive for widespread adoption. By leveraging existing pipeline technologies and developing new infrastructure for CO2 transport, we can accelerate the deployment of CCUS projects and contribute to global emissions reduction goals. Despite the benefits, there are challenges. High upfront costs, public acceptance, and regulatory approval are significant hurdles to building new CO2 pipelines. Additionally, as more CCUS projects come online, it's crucial to ensure that pipelines can meet the growing demand for CO2 transport, which requires strategic planning and investment in infrastructure. The technological acceptance of such technologies seems to raise not only in the US and Middle East but also elsewhere in the world.

Hydrogen pipelines will also create further additional markets for alloyed steel tubes.

The automotive market, accounting for about 15% of the global tube and pipe market and the mechanical engineering market accounting for 9% are offering interesting opportunities. (see also our previous report in ITAtube Journal from Dec. 2024)

The construction market, which accounts for around 5% of the global pipe market, represents another opportunity for pipe manufacturers with growth potential.

The Construction Market is forecasted to grow at a rate of CAGR of 5.9% from 2025 to 2030. The sector is involved in a wide range of projects, including residential, commercial, industrial, civil engineering and institutional construction, with multiple stakeholders such as architects, engineers, contractors, suppliers, developers, investors and government agencies involved in the process. Construction activity in the US and Northeast Asia picked up, driving global construction output growth. With high interest rates, new investment in residential construction fell sharply. The infrastructure, energy & utilities and industrial sectors will remain the main drivers of construction output.

The penetration of structural tubes in the building and construction market has been uneven throughout the world. In North America and parts of Asia, pipe products are widely used in building construction. In Europe, on the other hand, standard concrete or open steel structures are still dominantly used. The tube industry must continue to promote the benefits of tubular applications and demonstrate the architectural prospects. Tubular profiles are an ideal choice when visible structures are desired due to their versatile shapes and closed cross-sections combined with smooth sides. The best mechanical properties and the ability to bridge large spans are further highlights of tubular profiles. In addition to round structural tubes, rectangular profiles dominate in architecture.

Such profiles are usually cold-rolled and formed in so-called "Turk's heads". In this process, attention must be paid to the metallurgical properties of the edges. Generally, unalloyed steel is used, but alloyed steels with their improved material properties should also be considered. In terms of carbon footprint, pipe profiles are of great advantage as the steel used can be produced from metal scab in electric arc furnaces powered by green electricity.

There is room for additional production capacity for structural tubes, particularly in India, to keep up with the market trend.

Sarah Liehsem

Tube Mexico 2025

"Tube Mexico and Expo-Manufactura will allow buyers to see first hand the latest innovations, products and services by suppliers from allover the world."

Sarah Liehsem
Senior Projekt Manager at
Messe Düsseldorf GmbH

Dr. Gunther Voswinckel, President of the Inzternational Tube Association, in an interview with Sarah Liehsem about Tube Mexico & the Mexican tube market

ITA: Tube Mexico in Monterrey is celebrating its premiere in 2025. How many exhibitors will present their products and latest technologies?

S. Liehsem: 49 exhibitors will showcase their innovations.

ITA: What are the main topics of Tube Mexico?

All our Tube trade shows are encompassing the entire market spectrum from equipment producers to end-product manufacturers and traders. We feel it is important to reflect as much of the entire value chain as possible.

ITA: Mexico is gaining further importance as an attractive production hub for many industries. Tube Mexico trade show seems to be happening just at the right time. Can you confirm this trend from the organizer´s side?

S. Liehsem: We are very excited that our clients share this approach with us and see Mexico's potential for the near and also more distant future. Mexico continues to be an important manufacturing base for companies from all countries who are interested in the combined North American market. We only foresee this to continue in the medium and long term.

ITA: Mexico is seen as a production hub for the entire American continent. Do you see any strategical change initiated by the new US administration of President Trump?

S. Liehsem: Our approach to new markets always have a more long-term outlook and we believe in Mexico's potential. NAFTA and now USMCA have been around since 1994 and companies have been creating integrated supply chains since this time. There have been many changes in government in all 3 countries since the beginning, yet

Mexico continues to grow as a manufacturing powerhouse. While there will always be changes with each administration, given the long term investments that have been made by many US and international companies in Mexico in varied manufacturing industries, we do not expect the growth in Mexico to stop for the foreseeable future.

ITA: Many automotive producers and their suppliers have already realized or plan to extend their production base in Mexico. This trend was fired e.g., by the political ban of combustion driven vehicles in Europe from 2035 onwards. This trend has certainly effects on the tube industry as well. Do you see such trend reflected at Tube Mexico?

S. Liehsem: Mexico has moved up to I believe it is the 5th largest auto manufacturer in the world. Given the investments made in both assembly plants and auto parts manufacturers in Mexico, we expect the tube industry to continue to grow in Mexico

ITA: Your organization team is very committed to offer the best environment for the industry to meet, exchange and create a business platform. What are the highlights you would like emphasis to encourage the industry to come to this year's Tube Mexico?

S. Liehsem: The Messe Düsseldorf group with its over 75 years of history has always focused on serving our clients with professionally organized events in the most ideal location. Tube Mexico and Expo Manufactura will allow buyers to see firsthand the latest innovations, products and services by suppliers from all over the world. This will help them to improve their tube manufacturing processes and stay competitive.

Tube
Mexico

Albert Sedlmaier

Tube Mexico 2025

Albert Sedlmaier
Managing Director data M Sheet Metal Solutions GmbH, ITA Vice President, Europe

data M Sheet Metal Solutions GmbH not only develops the industry leading – software solution “COPRA” - the team is also known for its deep expertise, and global experience in the roll forming and tube making market. With the COPRA software they solve complex manufacturing challenges, helping companies streamline operations and reduce costs. National and international customers have been relying on them as a dependable partner now for almost 40 years. With Dipl.-Ing. Maximilian Sedlmaier as the Managing Director, the second generation is now leading the successful and innovative family business. The global reach and personalized approach make them a trusted partner in the roll forming sector.

www.datam.de/en, Booth at Tube Mexico 2025: F1-2905 (at German Pavilion)

ITA: Tube Mexico is celebrating its premiere in Monterrey this year. What do you expect from Tube Mexico 2025?

A. Sedelmeier: Our motivation to participate at Tube Mexico 2025 is from the market potential we see. The country’s industrial sector, combined with its strategic location presents significant opportunities for us.
We already have a couple of customers in Mexico and want to grow our customer base further but also meet old customers and friends. With COPRA we offer a versatile CAE software package for tube makers as well as roll forming companies and producers of shaped wire. Our products enhance, manufacturing efficiency and quality. It also reduces production costs and the environmental footprint significantly.

These are topics we’d like to discuss with our visitors during this show.

Actually we are also eager to meet with visitors from wire industry, too. We are happy that Messe Düsseldorf has been organizing this show in conjunction with exhibition wire 2025.

ITA: What are your highlights in products and technologies you are presenting at Tube Mexico? (representative picture)

A. Sedelmeier: At Tube 2025 we will be showcasing our latest COPRA software products.

COPRA RF and COPRA FEA RF are a highly innovative CAE (Computer Aided Engineering) software for the ERW tube making and also sheet metal roll forming industry. Now, manufacturers can move rapidly from design department to shop floor and back again as changes come through from the engineering team. Working with COPRA software also allows easy transfer of know-how within a team and transfer of data from COPRA to CNC machines for example. This workflow boosts productivity and allows projects to move much faster.

ITA: Can you tell us about some recent highlight application case you have successfully completed?

A. Sedelmeier: data M Sheet Metal Solutions GmbH recently installed a comprehensive software license (and training) to a Mexican Tube Maker who wanted to improve his engineering work.

We also recently completed a larger service project for tool development in Mexico

Boehlerit

Sawtec brazed – Precision and durability for demanding applications

Boehlerit GmbH & Co. KG presents new brazed saw blades

Boehlerit GmbH & Co. KG, a leading manufacturer of high-precision cutting tools, is launching a new product line on the market: Sawtec brazed. This innovative product range has been specially developed for demanding applications in metalworking and other industrial sectors and offers an outstanding combination of tool life, precision and cost-effectiveness.

With Sawtec brazed, Boehlerit is responding to the growing demands in modern manufacturing processes where the highest cutting quality and long tool life are required. The brazed design, in which the saw teeth are firmly connected to the saw blade body by means of high-performance brazing systems, ensures a particularly stable connection and high resistance to the extreme forces that occur during the cutting processes

Precision for the highest demands

The new brazed saw blades are characterised not only by their first-class precision, but also by the careful selection and processing of high-quality materials in combination with innovative manufacturing techniques. This enables an exceptionally high cutting quality with minimal wear, resulting in a significant increase in productivity and a reduction in downtimes in the application. Thorsten Almer, Product Manager bar peeling and sawing, explains: ‘Our brazed saw blades have been specially developed for use in heavy-duty industrial sectors where, in addition to performance, a long service life and consistent cutting quality are also required. With our many years of experience in tool development, we are once again setting new standards with this new product range.’

Robustness and durability

Sawtec brazed saw blades offer high resistance to abrasion and overheating, which not only extends the service life of the tools, but also guarantees consistently high performance over the entire work cycle. Particularly in metalworking and applications that require precise cuts, the new saw blades impress with their high stability and durability, even under extreme conditions.

Wide range of applications

The new brazed saw blades from Boehlerit are suitable for a wide range of applications and cover a broad spectrum from soft to harder materials. To meet the specific needs of different industries, Boehlerit offers the saw blades in a diameter range of 250 - 460 mm and with a cutting width of 2 - 2.8 mm. Other dimensions and cutting widths are available on request.

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Fives Group

High-performance OTO tube mills for the renewable energy market

Metalogalva, a leading European company in the steel industry, has recently strengthened its long-standing partnership with Fives to produce high-performance tubes for the renewable energy and structural markets.

As part of its medium-term sustainability strategy, the company entrusted Fives to design, supply and commission two OTO tube mills and a high-speed OTO cut-off for its MSS Steel Tubes production subsidiaries in Portugal and the USA.

Technological excellence

The first OTO tube mill was commissioned in March 2022 at the MSS Steel Tubes plant in Vila Nova de Famalicão, Portugal. The technology enabled the customer to produce high-quality structural and solar tubes at a constant productivity speed. To further increase its efficiency, the company also ordered a high-speed OTO cut-off in 2023, which will be installed in the coming months.

"This project is in line with Metalogalva's strategic and sustainable development in the renewable energy industry, which is booming worldwide. Fives' technologies have exceeded our expectations in terms of engineering and reliability. That's why we continue investing, not only in Portugal but also in the US, where demand is growing, with a preference for local production," says Nuno Guimarães, Purchase & Logistic HoA at Metalogalva.

Successful collaboration

Thanks to these excellent results, Metalogalva once again entrusted Fives to supply a new OTO tube mill for its MSS Steel Tubes plant in Memphis, USA. The first tube was successfully produced in November 2024, marking an important milestone.

"Our long-term partnership with Fives led us to choose again its fully automated solutions to achieve maximum productivity and ensure high-quality standards. The collaboration between the teams has been excellent – from sales, project management, commissioning and after-sales, and we are proud to have delivered another successful project together," adds Nuno Guimarães

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Friedrich Kocks GmbH & Co KG

KOCKS supplies innovative solution for the production of seamless hollow sections to voestalpine Tubulars

The KOCKS 4-roll stand with individually driven rolls

voestalpine Tubulars in Austria has successfully commissioned the profile rolling mill engineered by Friedrich KOCKS GmbH & CO KG. Following the completion of all work and successful commissioning, the new equipment is now fully integrated into the hot tube rolling mill at the Kindberg site in Styria.

The award of the contract was preceded by an intensive technological dialogue on the design and construction of a solution for rolling seamless hollow sections. The centerpiece of the profile rolling mill, called PWW 530/4, consists of four consecutive 530 mm stands, each equipped with two horizontal and vertical rolls facing each other. These four rolls in the stands are individually driven. Based on KOCKS' proven 3-roll stand design, they feature caliber adjustment and allow for fast roll changes, providing high flexibility in production planning. The scope of supply also included the corresponding equipment for the roll shop.

voestalpine Tubulars, with its extensive experience in the production of seamless round tubes, is now also capable of producing seamless, hot-rolled square and rectangular hollow sections up to large formats and wall thicknesses.

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Tecnar

Tecnar's Lut 2.0 makes a breakthrough: The first installation on a welded pipe production line

Tecnar, a leading developer of laser sensors, is starting the new year with the first installation of its Lut 2.0 online wall thickness gauge on a welded pipe production line. The gauge was successfully installed at BORUSAN Pipe's Gemlik plant in Turkey. Strategically positioned at the outlet of the stretch-reducing mill (SRM), the Lut 2.0 system measures thin pipe wall thicknesses ranging from 2 to 10 mm with outer diameters (ODs) between 21 to 90 mm. This is a significant achievement because the Lut 2.0 is the only technology that can measure eccentricity in pipes with such small ODs.
The Lut 2.0, traditionally a critical tool for monitoring eccentricity in seamless steel pipe production, is now addressing the unique challenges of electric resistance welding (ERW) processes. The system provides invaluable data to optimize process control, enhance product quality and ensure manufacturing consistency by generating highly accurate radial profiles. The profiles are detailed as graphs of wall thickness measured around the pipe's circumference.
The BORUSAN Pipe and Tecnar teams worked together on the successful installation with start-up and commissioning completed on time and without issues. Operators at the Gemlik plant praised the system's exceptional reliability, performance and precision – even in demanding production environments.
Lut 2.0 is the most advanced online gauging system, capable of measuring true wall thickness, detecting eccentricity and producing detailed radial profiles along the length of hot steel pipes – all without contact. The system is designed to improve process control and quality assurance for both seamless and welded pipe applications. This installation marks a new frontier for Lut 2.0 and reinforces Tecnar's commitment to providing cutting-edge solutions for steel and pipe manufacturing industries.

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WAFIOS AG

A Change to the WAFIOS Executive Board

The new WAFIOS Executive Board: Jörg Eisele, Dr.-Ing. Uwe-Peter Weigmann and Martin Mayer. Image: WAFIOS

Martin Holder is retiring and Jörg Eisele and Martin Mayer are joining the Executive Board.

The start of 2025 is accompanied by a change to the Executive Board. After 51 years at WAFIOS, Martin Holder is saying goodbye and starting his retirement. The new Executive Board will be made up of Dr.-Ing. Uwe-Peter Weigmann, Speaker of the Board, and new members Dipl.-Ing. Jörg Eisele and Dipl.-Ing. Martin Mayer.

Jörg Eisele joined the company back in 2004. After successfully completing his degree in mechanical engineering, Eisele began his career at WAFIOS as an assistant to the Head of Design, where he focused on developing innovation management.

Alongside his work, he studied for an MBA at the Technical University of Munich, which he completed in 2009. At WAFIOS, he then went on to lead the Tool Center and, later, the Technical Development department for various machine areas. Since 2017, he has been responsible for the entire Tube and Wire division, including the Technical Development, Sales and

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Commissioning departments for various machines, such as spring coiling, wire bending, CNC tube bending, straightening, chain manufacturing and e-mobility machines. As of 2021, he also assumed overall responsibility for Sales at WAFIOS.

Jörg Eisele: "I have known the company, the employees and the associated strengths for many years. Over this time, I have been able to actively drive forward the expansion of various businness areas. In addition to further developing conventional WAFIOS machine areas, a highlight for me has been to establish the new E-Mobility and Digital Services areas. My focus has always been on developing new products and technologies offering added value for our customers."

Martin Mayer joined WAFIOS AG in February 2023 and is responsible for the Tool Center and Mechanical Production. After successfully completing his degree in mechanical engineering, majoring in design and development, at Esslingen University of Applied Sciences, he joined NAGEL Maschinen- und Werkzeugfabrik GmbH in Nürtingen as a development engineer in 2007. Mayer left the company 15 years later as Technical Director. From 2021 to 2023, he was the founder of and partner in a recruitment consultancy before returning to the mechanical engineering sector.

"WAFIOS excels as an innovative technology company in the field of wire and tube bending machines. To bring newly developed machine concepts to the market in the shortest possible time and ensure economical tool solutions for our customers, we will be building on flexible and high-performance production in future," says Martin Mayer.

Dr.-Ing. Uwe-Peter Weigmann studied forming technology at Technische Universität Berlin. During his doctoral studies, he worked with Prof. Dr. Günter Spur as a senior engineer in the field of manufacturing technology and machine tools and obtained a doctorate in the same area. He has been part of the Executive Board, heading up Engineering, since 2008. In 2012, he was appointed Speaker and broadened his remit to include HR. Weigmann assumed responsibility for Sales and Finance in 2017.

Faster response times with specialized divisions

The Supervisory Board made the following decision regarding how the duties were to be allocated among the members of the Executive Board: Dr.-Ing. Uwe-Peter Weigmann will continue to be Speaker of the Board and will be responsible for Development, IT, Finance, HR and Automation. Martin Mayer will take care of Mechanical Production, Assembly, Logistics, Quality Management and Purchasing, while Jörg Eisele will head the Sales, Marketing, Service and Legal departments. Dr.-Ing. Uwe-Peter Weigmann and Jörg Eisele will be jointly responsible for the new Spring, Tube, Wire, E-Mobility and Digital Services divisions. These business divisions incorporate customer-oriented functions such as sales, machine and tool design as well as commissioning of the corresponding products. "The new structure with the stated business divisions provides enhanced focus to enable us to respond quickly to customer-specific needs," says Weigmann.

51 years at WAFIOS

After 51 years of service, Martin Holder is calling time on his career at WAFIOS and entering retirement. However, he will continue to support WAFIOS AG in an advisory capacity. Holder joined the company back in 1973 as a mechanics trainee. He spent two years working in Mechanical Production and then moved to EDP, now known as the IT department. His degree in business administration and business information systems and teamwork in a group have shaped him over the years and also influenced his way of working at the company. In 2009, Holder assumed the position on the Executive Board that he has held to this day.

"His actions have shaped the company on a long-term basis and his tireless dedication has been a driving force here. He led WAFIOS toward digitalization early on, making the company one of the first SAP customers, and is committed to a modern and digital working environment to this day. Now his well-earned retirement awaits. On behalf of WAFIOS AG, I would like to thank my colleague for his many years of service," says Dr.-Ing. Uwe-Peter Weigmann, Speaker of the Board. "In Martin Mayer and Jörg Eisele, two experienced colleagues are assuming Martin Holder's position."

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Tube Eurasia 2025

Explore the Tube Eurasia 2025 Exhibitor List & Get Your Visitor Ticket Now!

The Tube Eurasia 2025 is just around the corner – the leading event for the tube and pipe industry in Türkiye! From 9 – 12 April 2025, the industry will gather at the Tüyap Fair and Congress Centre in Istanbul to discover the latest innovations and technologies.

As an ITA member, we warmly invite you to be part of this significant event. The exhibition offers you:

- Discover top industry players! Browse the Exhibitor List (https://www.tube-eurasia.com/) to see the latest innovations and leading companies.
- Explore cutting-edge technologies in tube and pipe manufacturing.
- Connect with global industry experts and decision-makers.
- Experience advanced manufacturing solutions and automation technologies.
- Don't miss out – secure your ticket today! Get your visitor ticket here (https://tubeeurasia.com/en/online-ticket) and be part of Tube Eurasia 2025.

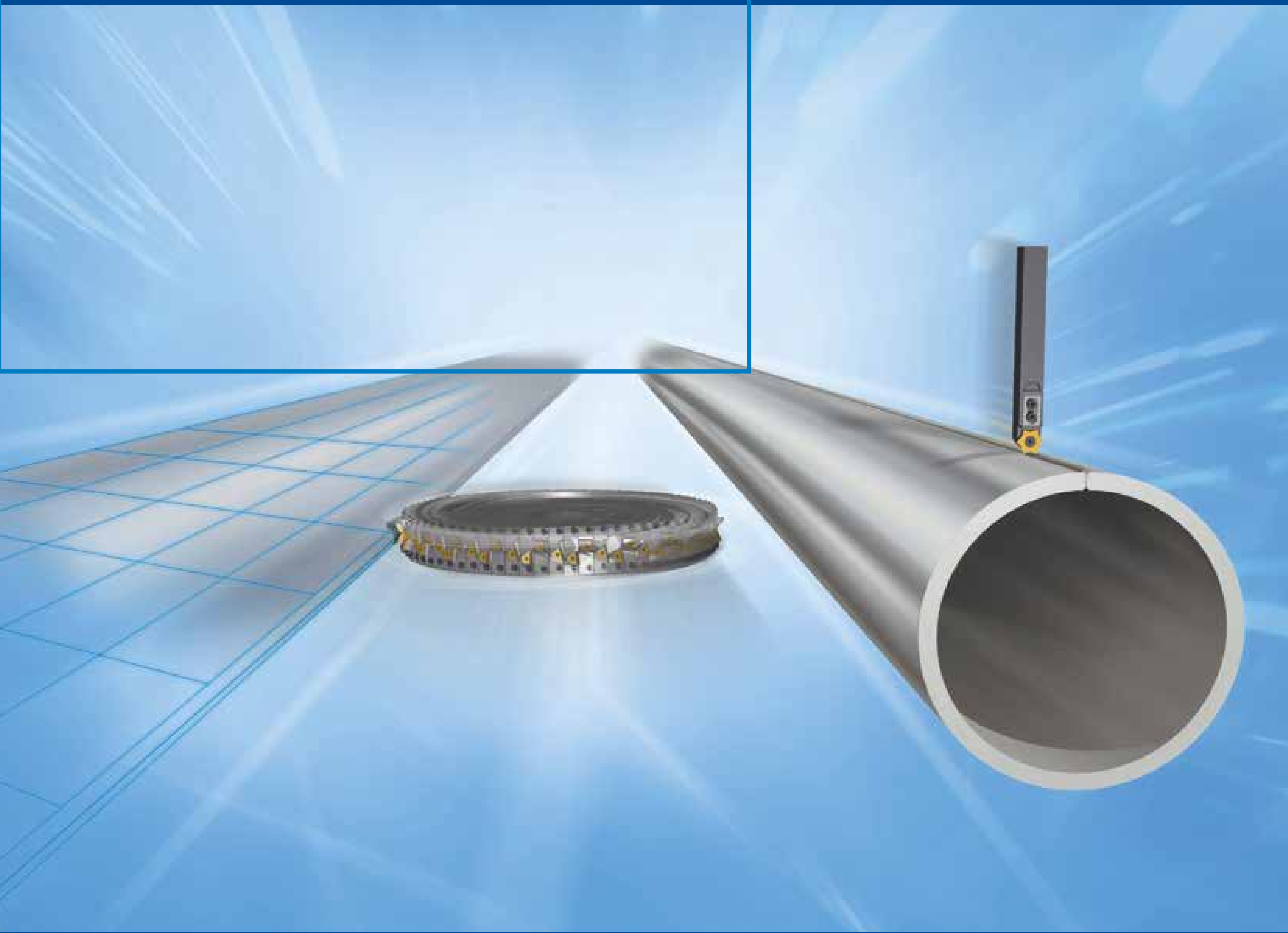
Would you like to participate as an exhibitor?

To reserve your exhibition space or for more information, please get in touch with:

- Aylin Çelik (CelikA@messe-duesseldorf.de)

boehlerit

Know-how in the field of tube machining



- Boehlerit offers an unrivalled diversity of products and the full range of cutting and machining solutions for the production of pipes.
- Other industries also draw on our decades of experience and know-how in very special machining processes, for example in the case of plate edge machining.

Boehlerit GmbH & Co.KG, Werk VI-Straße 100, 8605 Kapfenberg,Phone +43 3862 300-0, www.boehlerit.com

Metalflow Alliance

ITA invitation for Tube Exhibitors at Metalflow Alliance Saudi Arabia 2025

The Metalflow Alliance Saudi Arabia 2025 is fast approaching – the premier event for the metal processing and manufacturing industry! From 5–7 May 2025, leading industry professionals will gather at the Riyadh International Convention & Exhibition Center, Saudi Arabia to explore innovations, make valuable connections, and expand business opportunities.

Final Stand Spaces Available!

Are you looking for a prime location to showcase your company at Metalflow Alliance Saudi Arabia 2025? Limited stand spaces are still available, but they are filling up fast! Don't miss your chance to be part of this important industry event.

Find out more about stand options and pricing:

https://www.mfa-sa.com/

Why Exhibit?

- Showcase your latest innovations to a global audience.
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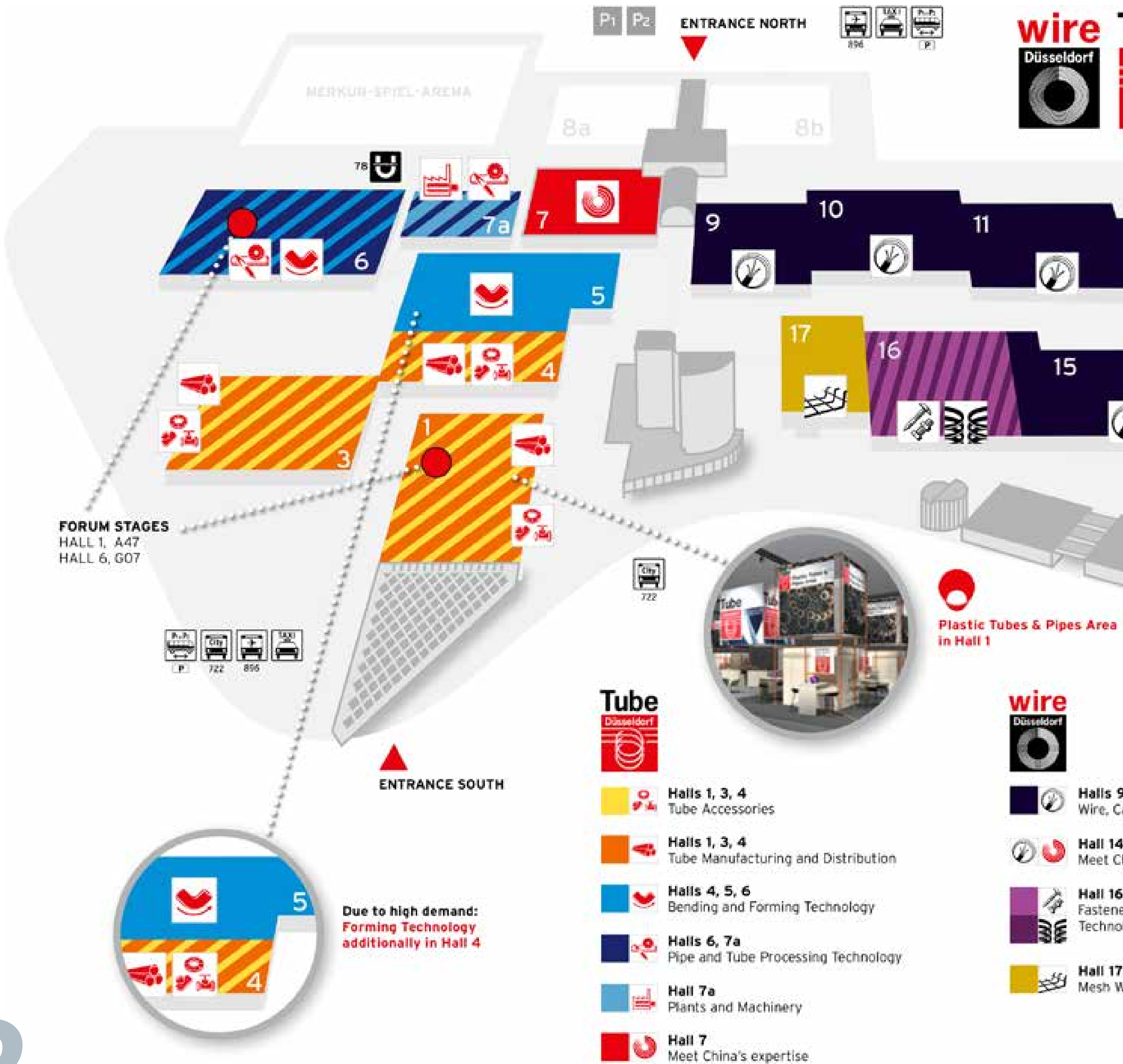
- Gain visibility alongside leading international exhibitors.

Not exhibiting?
For more information, please get in touch with:

- Sarah Liehsem (LiehsemS@messe-duesseldorf.de)
- Aylin Çelik (CelikA@messe-duesseldorf.de)

Tube 2026, Düsseldorf

Tube 2026 – Application Start



1,200 exhibitors from 54 countries present their innovations along the entire value chain at the No. 1 trade fair for the tube industry: Tube showcases the entire spectrum - from raw materials to tube production, tube processing technology, tube accessories, tube trade, forming technology and machinery and equipment. Whether as an exhibitor, trade visitor or investor: the world's most important tube trade fair in Düsseldorf is "the place to be" for central industries, trade, commerce and research. Make valuable contacts at the highest level, be inspired and take advantage of opportunities for new business.

Online Application

Present your company at the world's leading trade fair for the tube industry from 13.-17. April 2026.

In a few steps you can easily and conveniently register as an exhibitor for participation.

https://www.tube-tradefair.com/en/Exhibit/Trade_Fair_Participation/Online_Application

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April 2025

09 - 12 Tube Eurasia | Tube & Steel Istanbul — www.tube-eurasia.com
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May 2025

05 - 07 Metalflow Alliance Saudi-Arabia — www.tube-mea.com
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06 - 08 Tube Middle East Africa Metal & Steel Egypt — tube-mea.com
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08 - 11 FABTECH — fabtechexpo.com

17 - 19 Tube South East Asia — tube-southeastasia.com

October 2025

08 ITAtube Conference, online — itatube.org
deadline registration: September 24th, 2025,
early bird until July 23rd, 2025

21 - 24 Blechexpo — blechexpo-messe.de

November 2025

18 - 20 Stainless Steel World Expo — stainless-steel-world-event.com

April 2026

13 - 17 Tube Düsseldorf — tube-tradefair.com

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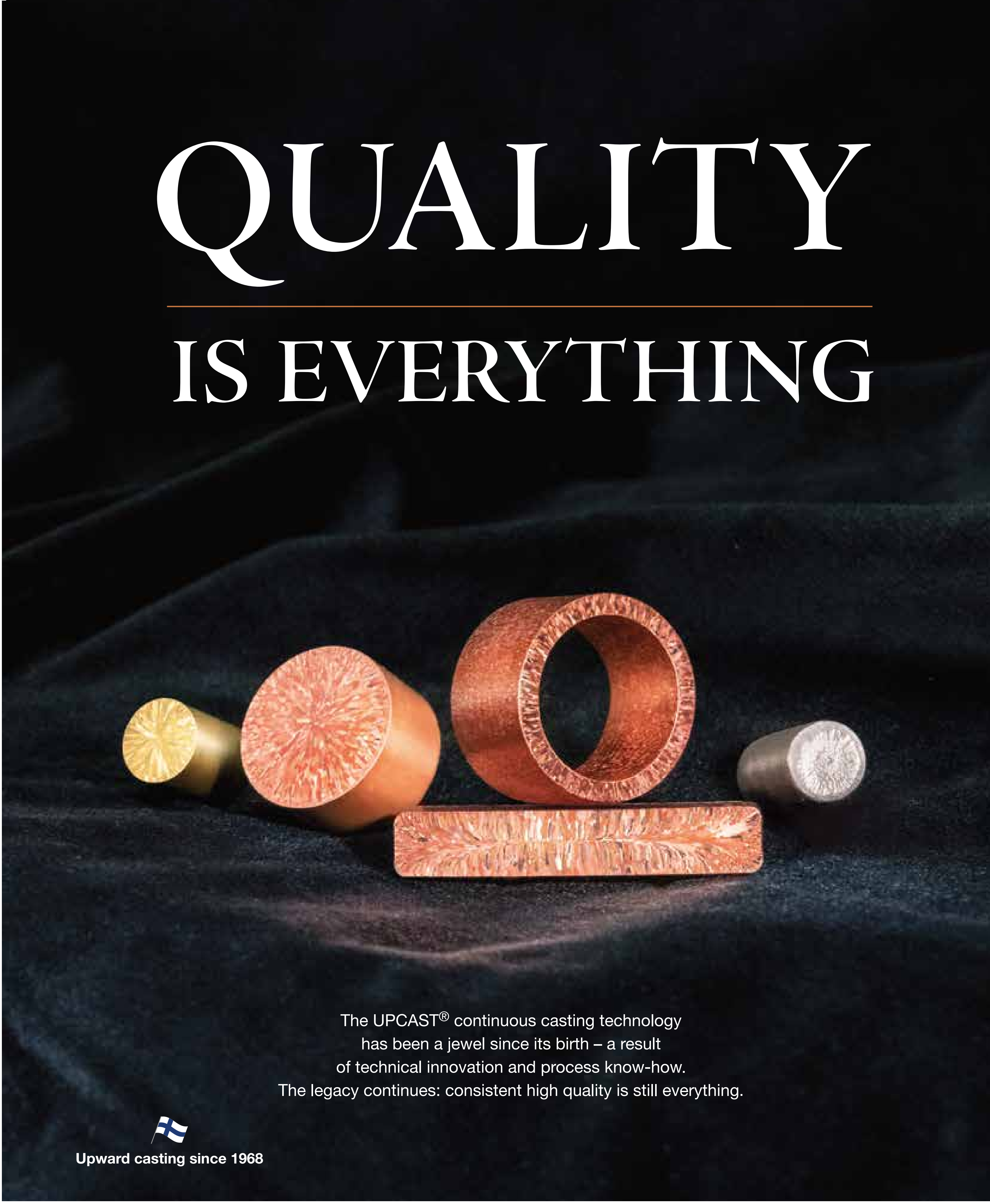
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ITA – International Tube Association

ITAtube Conference 2025 – North America Tube and Pipe Industry Outlook

October 8th, 2025 - online

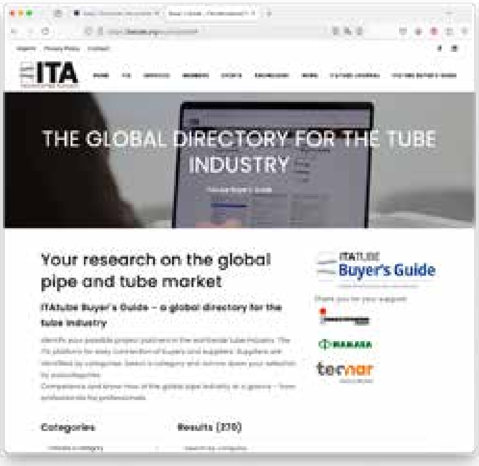
Exciting times with both positive and challenging developments are experienced by the global tube and pipe industry.

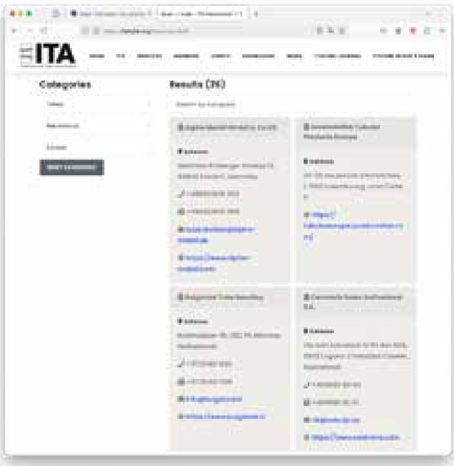
The geopolitical challenges as well as the demands of climate change regarding decarbonization of our industry are having a lasting impact on the global pipe market. The geopolitically risky for the oil and gas supply in middles east has eased due to the ceasefire in the Gaza conflict. The announcement of the new US government to enlarge the exploration activities of oil and gas "pump baby pump", will create further demand for OCTG pipe products.

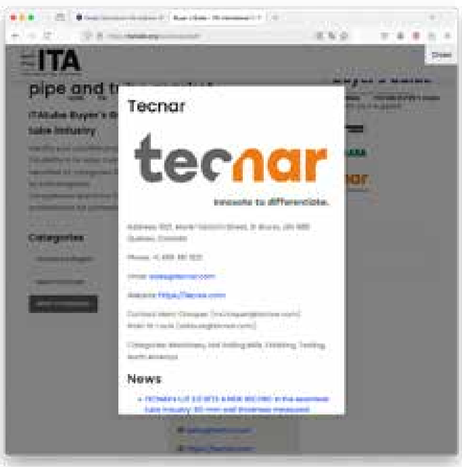
The construction industry is becoming increasingly interesting, with new architectural solutions intensifying the use of tubular products.

The ITA, International Tube Association, together with our ITA North American Board organizes a web-based conference with senior experts from the US and Europe to discuss commercial consequences and opportunities arising from the new geopolitical developments. A focus will be on the US market, anyhow challenges for other regions will also be highlighted.

We will keep you updated!







ITATUBE
Buyer's Guide
Global directory for the tube industry

Your global directory for the tube industry is online after a great and very well received presentation during Tube Düsseldorf. 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.

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Editions in 2025

01/25 | Tube Mexico | review 2024, preview Tube events 2025
deadline: January 10th, 2025

02/25 | ITAtube Conference | Conference, review Tube events
deadline: May 15th , 2025

03/25 | Tube Düsseldorf | review ITAtube Conference,
preview Tube Düsseldorf, deadline: September 15th, 2025

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Look at our next issue:

- Review Tube shows
- Preview ITAtube Conference
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