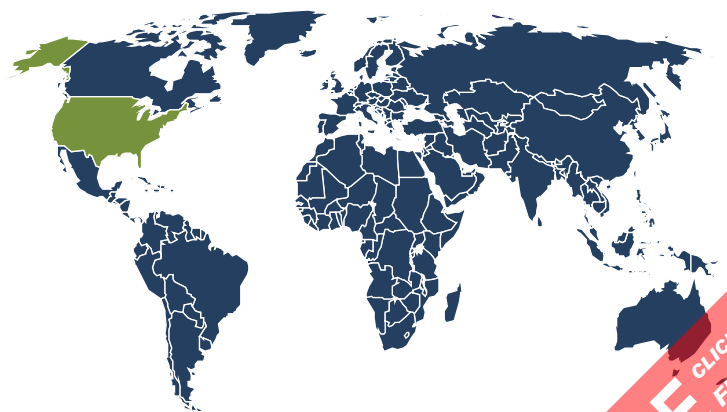


Freedonia Focus Reports
US Collection

Pipe: United States

October 2020



www.freedoniafocusreports.com

BROCHURE
CLICK TO ORDER
FULL REPORT

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	6
Impact of COVID-19 on the Pipe Industry	7
Pricing Trends	8
Sustainability, Recycling, & Reuse	9
3. Segmentation & Forecasts	11
Materials	11
Steel	12
Plastic	13
Copper	14
Concrete	15
Other Materials	16
Markets	19
Structural & Mechanical Pipe	20
Oil & Gas Pipe	20
Potable Water Pipe	21
Storm & Sanitary Sewer Pipe	22
Other Markets	22
4. Industry Structure	25
Industry Characteristics	25
Market Share	26
Tenaris	28
JM Eagle	28
Zekelman Industries	28
5. About This Report	30
Scope	30
Sources	30
Industry Codes	31
Freedonia Methodology	31
Resources	33

List of Tables & Figures

Figure 1 Key Trends in the US Pipe Market, 2019 – 2024	4
Figure 2 US Pipe Demand Trends, 2009 – 2019	5
Table 1 Key Indicators for US Pipe Demand, 2009 – 2024 (US\$ bil)	6
Figure 3 US Pipe Demand by Material, 2009 – 2024 (US\$ bil)	11
Table 2 US Pipe Demand by Material, 2009 – 2024 (US\$ mil)	11
Figure 4 US Pipe Demand by Material, 2009 – 2024 (%)	18
Figure 5 US Pipe Demand by Market, 2009 – 2024 (US\$ bil)	19
Table 3 US Pipe Demand by Market, 2009 – 2024 (US\$ mil)	19
Figure 6 US Pipe Demand by Market, 2009 – 2024 (%)	24
Figure 7 US Pipe Market Share by Company, 2019 (%)	26
Table 4 Leading Suppliers to the US Pipe Market by Type	27
Table 5 NAICS & SIC Codes Related to Pipe	31

About This Report

Scope

This report forecasts to 2024 US pipe demand in nominal US dollars at the manufacturer level. Total demand is segmented by material in terms of:

- steel
- plastic
- copper
- concrete
- other materials such as aluminum, other nonferrous metals, ductile iron, and clay

Total demand is also segmented by market as follows:

- structural and mechanical
- oil and gas
- potable water
- storm and sanitary sewer
- other markets such as conduit, industrial processing, and drain/waste/vent, and irrigation

To illustrate historical trends, total demand and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Although distinctions are sometimes made between pipes and tubes, for the purposes of this report the terms “pipe”, “tube”, and “tubular products” are used interchangeably. Fittings are excluded from the scope of the report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Pipe: United States (FF60111) is based on [Pipe Products & Markets](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

About This Report

- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Pipe

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
326122	Plastics pipe and pipe fitting manufacturing	3084	Plastics pipe
331420	Copper rolling, drawing, extruding, and alloying	3351	Rolling, drawing, and extruding of copper
331111	Iron and steel mills	3312	Steel works, blast furnaces (including coke ovens), and rolling mills
331210	Iron and steel pipe and tube manufacturing from purchased steel	3317	Steel pipe and tubes
331511	Iron foundries	3321	Gray and ductile iron foundries
331316	Aluminum extruded product manufacturing	3354	Aluminum extruded products
327120	Clay building materials and refractories manufacturing	3259	Structural clay products, not elsewhere classified
335932	Noncurrent-carrying wiring device manufacturing	3644	Noncurrent-carrying wiring devices
327332	Concrete pipe manufacturing	3272	Concrete products, except block and brick
332996	Fabricated pipe and pipe fitting manufacturing	3498	Fabricated pipe and pipe fittings

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both

About This Report

top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Pipe Products & Markets

Freedonia Industry Studies

Behind the Wall Plumbing

Global Electric Power Transmission & Distribution Equipment

Global Pipe

Global Water Treatment Equipment & Chemicals

Lawn & Garden Watering Products

Plumbing Fixtures & Fittings

Precast Concrete Products

Freedonia Focus Reports

Aluminum Pipe: United States

Copper Pipe: United States

Oil & Natural Gas Pipe: United States

Pipe: United States

Plastic Pipe: United States

Polyvinyl Chloride: United States

Potable Water Pipe: United States

Steel Mill Products: United States

Steel Pipe: United States

Freedonia Custom Research

Trade Publications

Chemical Week

ICIS Chemical Business

Journal of Light Construction

Oil & Gas Journal

Pipeline & Gas Journal

Plastics News

Trenchless Technology

Agencies & Associations

Alliance for PE Pipe

Aluminum Association

American Chemistry Council

American Concrete Pipe Association

American Iron and Steel Institute

About This Report

Cast Iron Soil Pipe Institute
Copper Development Association
Ductile Iron Pipe Research Association
Federal Energy Regulatory Commission
Fiberglass Tank & Pipe Institute
National Association of Home Builders
National Clay Pipe Institute
National Corrugated Steel Pipe Association
Plastic Pipe and Fittings Association
Plastics Pipe Institute (a division of the Society of the Plastics Industry)
Steel Tube Institute
Uni-Bell PVC Pipe Association
United States Census Bureau
United States Department of Agriculture
United States Energy Information Administration
United States Environmental Protection Agency
United States International Trade Commission