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US Collection

# Potable Water Pipe: United States

January 2019



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	5
<b>3. Segmentation &amp; Forecasts</b>	<b>6</b>
Materials	6
Plastic	8
Copper	9
Steel	10
Ductile Iron	11
Concrete	12
Markets	14
Distribution	15
Transmission	16
Service	18
Rural	18
<b>4. Industry Structure</b>	<b>20</b>
Industry Characteristics	20
Market Leaders	22
JM Eagle	23
Mueller Industries	23
Forterra	23
<b>5. About This Report</b>	<b>25</b>
Scope	25
Sources	25
Industry Codes	26
Freedonia Methodology	26
Resources	28

# List of Tables & Figures

---

Figure 1   Key Trends in US Potable Water Pipe Demand, 2017 – 2022	3
Figure 2   US Potable Water Pipe Demand Trends, 2007 – 2017	4
Table 1   Key Indicators for US Potable Water Pipe Demand, 2007 – 2022 (US\$ bil)	5
Figure 3   US Potable Water Pipe Demand by Material, 2007 – 2022 (US\$ mil)	6
Table 2   US Potable Water Pipe Demand by Material, 2007 – 2022 (US\$ mil)	6
Figure 4   US Potable Water Pipe Demand by Material, 2007 – 2022 (%)	13
Figure 5   US Potable Water Pipe Demand by Market, 2007 – 2022 (US\$ mil)	14
Table 3   US Potable Water Pipe Demand by Market, 2007 – 2022 (US\$ mil)	14
Figure 6   US Potable Water Pipe Demand by Market, 2007 – 2022 (%)	19
Table 4   Leading Suppliers to the US Potable Water Pipe Market by Product Line	22
Table 5   NAICS & SIC Codes Related to Potable Water Pipe	26

# About This Report

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## Scope

This report forecasts to 2022 US potable water pipe demand in nominal US dollars at the manufacturer level. Total demand is segmented by material in terms of:

- plastic
- copper
- steel
- ductile iron
- concrete

Total demand is also segmented by market as follows:

- distribution
- transmission
- service
- rural

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Although distinctions are sometimes made between pipes and tubes, for the purposes of this report the terms “pipe” and “tube” 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 suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Potable Water Pipe: United States* (FF60112) 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
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press

## About This Report

- 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 Potable Water Pipe

NAICS/SCIAN 2007		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 top-down and bottom-up) and then triangulate those results to come up with the most

## About This Report

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.

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## Resources

### The Freedonia Group

*Pipe: Products & Markets*

### Freedonia Industry Studies

*Behind the Wall Plumbing*

*Global Plumbing Fixtures & Fittings Market*

*Plumbing Fittings Market in the US*

*Plumbing Fixtures Market in the US*

*Precast Concrete Products*

### Freedonia Focus Reports

*Behind the Wall Plumbing: United States*

*Consumer Water Treatment Systems: United States*

*Freight Services: United States*

*Kitchen & Bath Remodeling: United States*

*Polyvinyl Chloride: United States*

*Precast Concrete Products: United States*

*Precast Water & Waste Handling Products: United States*

*Steel Mill Products: United States*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*Chemical Week*

*ICIS Chemical Business*

*Journal of Light Construction*

*Plastics News*

*Trenchless Technology*

### Agencies & Associations

Alliance for PE Pipe

American Concrete Pipe Association

American Iron and Steel Institute

American Plastics Council

Copper Development Association

Ductile Iron Pipe Research Association

Federal Energy Regulatory Commission

Fiberglass Tank & Pipe Institute

National Association of Home Builders

## About This Report

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 Environmental Protection Agency

United States International Trade Commission