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# Large Diameter Pipe

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US Industry Study with Forecasts for **2012 & 2017**

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Study #2401 | September 2008 | \$4600 | 219 pages

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*Plastic pipe will grow the fastest based on resin and machinery improvements, as well as good joint integrity, excellent corrosion resistance and flow rates, and lower installation costs.*

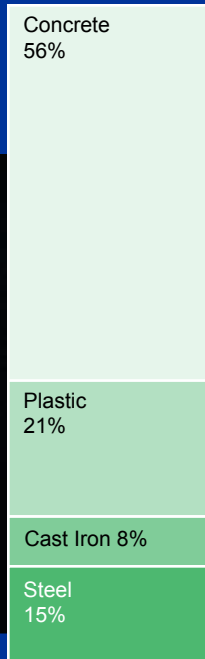
## US demand to grow 2.7% annually through 2012

Large diameter pipe demand in the US is forecast to increase 2.7 percent yearly to 203 million feet in 2012, valued at \$10 billion. Growth stimulants include a rebounding construction sector and needs to expand and upgrade an aging pipe infrastructure. Concrete will account for 54 percent of all linear pipe footage as a result of its structural integrity, durability, and high compression and pressure resistance. Best growth is anticipated for plastic pipe in light of resin and machinery improvements, as well as good joint integrity, excellent corrosion resistance and flow rates, and lower installation costs. Storm sewers will remain the leading large diameter pipe market due to widespread drainage applications, and expanded highway and street construction projects.

## Plastic pipe to offer best growth opportunities

Demand for large diameter concrete pipe is projected to advance 2.0 percent annually through 2012, paced by drainage and irrigation applications. Demand for plastic pipe will expand 5.6 percent annually through the forecast period, creating a market for 1.3 billion pounds of resin. Plastic pipe advances will be stimulated by resin advances (e.g., bimodal polyethylene and molecularly oriented PVC), which will extend the

## US Large Diameter Pipe Demand (178.1 million feet, 2007)



pressure resistance and other properties of large diameter plastic pipe. Best opportunities are expected for large diameter polyvinyl chloride (PVC) pipe, which is projected to expand at a 6.0 percent annual pace through 2012. Opportunities in storm and sanitary sewers will fuel growth. Demand for high density polyethylene (HDPE) pipe will rise at a slightly slower pace and be driven by greater use in municipal and industrial pressure systems based on polyethylene's light weight and leak-proof butt-fuse welded seals. Good HDPE pipe growth is also expected in corrugated and natural gas distribution pipe.

Demand for large diameter steel pipe is projected to increase 1.8 percent per annum through 2012 due to steel's high strength, rigidity and pressure tolerance, especially in exploratory, distribution and transmission applications for the natural gas and petroleum industries. Cast iron pipe will remain the preferred choice in applications where high water pressure capabilities are required. However, advances will be constrained by competition from higher performing plastic pipe in water distribution and other pressurized uses. Clay pipe demand will slowly diminish based on competition from higher performing and lower cost plastic pipe.

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## Sample Text, Table & Chart

### MARKETS

#### Sanitary Sewers

Sanitary sewers accounted for about eight percent of large diameter pipe demand in 2007. The sector consists of large diameter pipes that carry sewage from residential and commercial plumbing components to the municipal sewer system. The Environmental Protection Agency estimates that the flow of sanitary sewage is a chronic and growing problem in many urban areas. Sanitary sewer collection systems are aging, with an average age of 45 years old.

**SAMPLE TEXT**

Sanitary sewer demand is primarily driven by legislation mandating a reduction in the amount of untreated effluent discharged into primary water sources. Sanitary sewer demand is also dependent on building construction expenditures and needs for replacement due to obsolescence or inadequate capacity. Other stimulants include the replacement of combination storm/sanitary sewer systems with separate systems, as well as the increasing conversion of septic tank systems to sanitary sewer networks as cities expand.

Demand for large diameter sanitary sewer pipe is projected to

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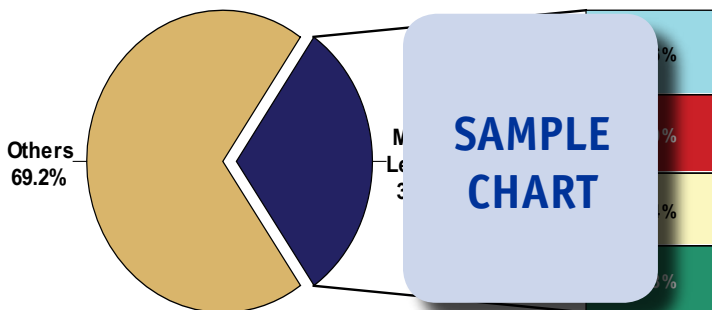
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TABLE III-1 LARGE DIAMETER PIPE DEMAND BY MARKET (million feet)					
Item	1997	2002	2007	2012	2017
Construction Expenditures (bil 2000\$)	500	570	610	697	740
ft pipe/000\$ construction	120	120	120	120	120
Large Diameter Pipe Demand	10	10	10	10	10
Storm Sewer	7	7	7	7	7
Water Distribution	5	5	5	5	5
Drainage & Irrigation	2	2	2	2	2
Sanitary Sewer	2	2	2	2	2
Natural Gas	3	3	3	3	3
Process Industries	2	2	2	2	2
Petroleum	9	9	9	9	9
\$/ft	4	4	4	4	4
Large Diameter Pipe Demand (mil \$)	4500	5700	6100	6970	7400

**SAMPLE TABLE**

CHART V-1

US LARGE DIAMETER PIPE MARKET SHARE, 2007  
 (\$8.1 billion)

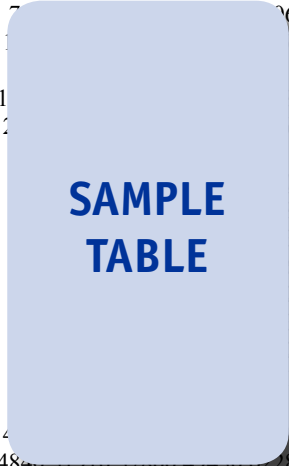


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-9**  
**LARGE DIAMETER HIGH DENSITY POLYETHYLENE PIPE**  
**DEMAND BY MARKET**  
**(million pounds)**

Item	1997	2002	2007	2012	2017
Construction Expenditures (bil 2000\$)	7	7	7	7	7
ft/mil \$ construction					
Large Diameter HDPE Pipe (000 ft)	11	11	11	11	11
lbs/ft					
Large Diameter HDPE Pipe Demand					
Drainage:					
Corrugated					
Other Drainage					
Natural Gas Distribution					
Water Distribution					
Petroleum					
Irrigation					
% HDPE					
Large Diameter Plastic Pipe (000 ft)	248	248	248	248	248



**COMPANY PROFILES**

**AMSTED Industries Incorporated**  
 Two Prudential Plaza  
 180 North Stetson Street, Suite 1800  
 Chicago, IL 60601  
 312-645-1700  
<http://www.amsted.com>

Annual Sales  
 Employed  
 Key Products

**SAMPLE PROFILE**

AMSTED Industries Incorporated is a manufacturer of railroad equipment, power transmission and building materials for the railroad and general industrial markets. The Company operates through three divisions: Railroad Products, Vehicular Products, and Construction and Industrial Products.

The Company participates in the US large diameter pipe market through the Construction and Industrial Products division, which includes the Griffin Pipe Products Company subsidiary (Downers Grove, Illinois). Griffin Pipe specializes in the production of ductile iron pipe for the transmission of potable water and wastewater. Products include push-on joint, mechanical joint, restrained joint and river crossing pipe.

Griffin Pipe's push-on joint pipe, which is made in diameters ranging from 3 to 48 inches, is offered with TYTON and FASTITE joints, both of which incorporate a single rubber sealing gasket to provide a tight, permanent seal. TYTON joints are licensed from the United States Pipe and Foundry Company Incorporated (Birmingham, Alabama) subsidiary of Mueller Water Products Incorporated, while

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“Plastic pipe will exhibit the best opportunities of all large diameter pipe and rise 5.6 percent annually to 49.6 million feet in 2012, accounting for 24 percent of all large diameter pipe demand by footage. Plastic pipe demand by weight will advance at a rapid 6.6 percent annual pace to 1.3 billion pounds, based on increased encroachment into larger diameters -- primarily at the expense of concrete pipe. Growth stimulants include plastic's light weight, corrosion resistance, long service life and lower installed cost compared to concrete, cast iron, steel and clay materials.”  
 --Section IV, pg. 104

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**OTHER STUDIES**

**World Plastic Pipe**

This study analyzes the global plastic pipe industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 for total pipe demand and plastic pipe demand by resin (e.g., polyvinyl chloride, high density polyethylene), world regional market (e.g., Asia/Pacific, North America, Western Europe) and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2411 ..... 10/2008..... \$5700

**Plumbing Fixtures & Fittings in China**

This study analyzes the world's fastest growing and second largest market for plumbing products. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by material (vitreous China, metal, plastic), product (bathtubs and showers, toilets, sinks, bathtub and shower fittings, lavatory fittings, kitchen and other sink fittings), market (residential, nonresidential), and geographic region. The study also considers market environment factors, details industry structure and profile industry participants.

#2394 ..... 10/2008..... \$5100

**Large Diameter Pipe in China**

This study analyzes the Chinese large diameter pipe industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by market (drainage, storm sewer, natural gas, water distribution, district heating, petroleum, sanitary sewer, process industries, irrigation), material (e.g., concrete, steel, plastic, cast iron) and region (e.g., Central-North, Central-East). The study also considers market environment indicators, details industry structure, evaluates company market share and profiles industry competitors.

#2348 ..... 10/2008..... \$5100

**World Cement**

Global demand for cement will grow 5.3% annually through 2012, driven by strong increases in construction activity in developing countries. The rate of growth in China, the largest market, will moderate considerably but remain above the world average. The second largest market, India, will grow the fastest. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2012 and 2017 by type, market, world region and for 46 countries. It also evaluates company market share and profiles 44 major players.

#2325 ..... 04/2008..... \$5800

**Plumbing Fixtures & Fittings**

Demand for plumbing fixtures and fittings in the US will reach \$11.4 billion in 2011. Growth will be supported by increasing improvement and repair applications and an acceleration in new nonresidential construction. Gains will also be supported by ongoing trends toward larger home bathrooms and kitchens. This study analyzes the \$10 billion US plumbing fixture and fitting industry, with forecasts for 2011 and 2016 by material type, market, and region. It also evaluates market share and profiles major players.

#2306 ..... 02/2008..... \$4700

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