Large Diameter Pipe

US Industry Study with Forecasts for **2015 & 2020**

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US Industry Study with Forecasts for ***2015 & 2020***

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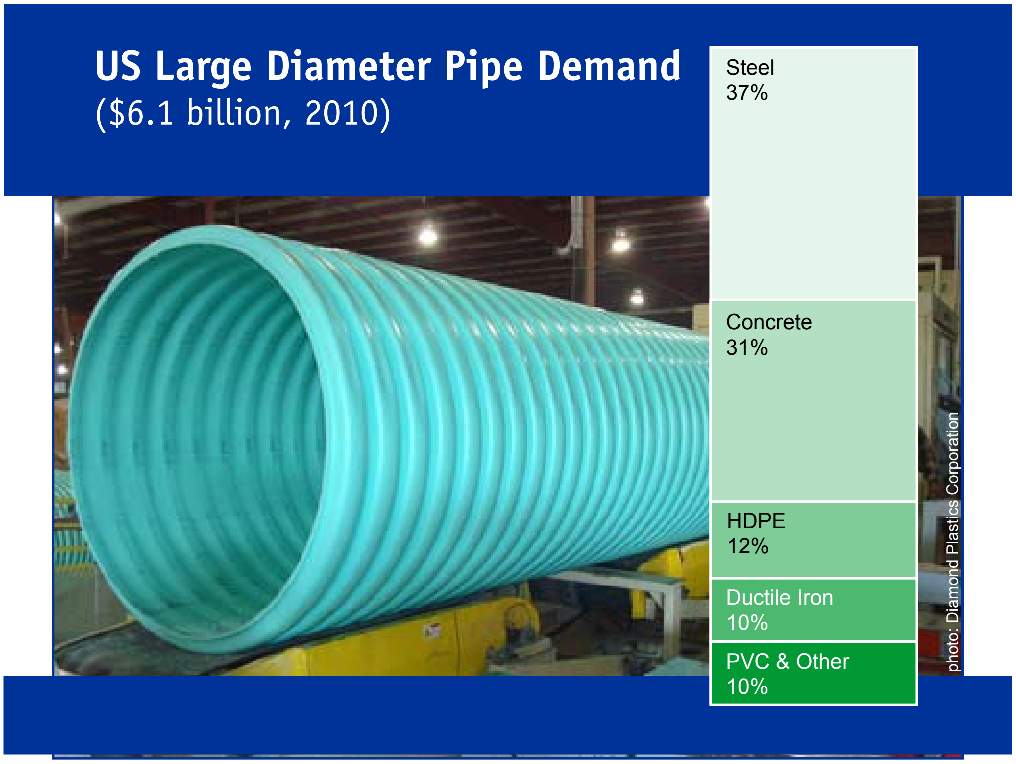
Growth will be fueled in part by a more favorable environment for public infrastructure spending, and by healthy increases in construction spending and process manufacturing activity.

US demand to rise 6.2% annually through 2015

US demand for large diameter pipe -- defined as pipe with a diameter of 15 inches or more -- will rise 6.2 percent per year to $8.2 billion in 2015. Gains will rebound strongly from the declining demand experienced during the 2005-2010 period, in which large diameter pipe markets were negatively impacted by the 2007-2009 recession. Going forward, rising demand will be fueled by a more favorable environment for public infrastructure spending, as state and municipal governments faced severe budgetary constraints in 2010 that caused many major projects to be delayed. Other factors benefiting large diameter pipe demand through 2015 include healthy increases in construction spending and process manufacturing activity, as well as the continued need to upgrade and repair the country's aging sewer and water pipe network.

Storm, sanitary sewers to remain leading outlet

Sewers -- including both storm and sanitary sewers -- will remain the leading outlet for large diameter pipe through 2015, accounting for about half of total demand. Sanitary sewers will be the faster growing of the two sectors, with advances bolstered by rebounds in building construction spending and public infrastructure investment. These factors will also drive rapid gains in demand for large diameter drainage and water transmission pipe. Demand advances for oil and gas pipe -- one of the few markets to see healthy growth during the 2005-2010 period -- will decelerate through 2015, as pipeline construction activity slows, although the development of unconventional gas resources will continue to provide opportunities.



Ductile iron, plastic pipe to be fastest growing

Steel and concrete were the leading large diameter pipe materials in 2010, combining to account for about two-thirds of total demand. However, steel will be the slowest-growing pipe material in value terms through 2015, restrained by moderating price increases, a deceleration in oil and gas applications, and market maturity in steel sewer pipe. Concrete pipe will fare better, rising at an above-average pace and rebounding from significant declines in demand during the 2005-2010 period. The most rapid gains in demand through 2015 will be for ductile iron pipe, driven by robust growth in the water and sanitary sewer markets. However, as with concrete, the bulk of these advances will be regaining demand levels lost during the 2007-2009 recession. Over the long term, the most favorable growth prospects are expected for large diameter plastic pipe, most notably high density polyethylene (HDPE), but also polyvinyl chloride (PVC) and fiberglass pipe.

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Sample Text, Table & Chart

SAMPLE TEXT

MATERIALS

Oil & Gas -- Demand for large diameter steel oil and g
rise ... billion in 2015. Pipe for oil
app ... segments: oil country tubula
(OC ... e accounts for the overwhelm
ity ... – over 90 percent of 2010 de
line ... ssion of crude petroleum, nat
petr ... is used in two very different
Smal ... gathering and well-connect a
while large diameter pipe is used for transmission and distrib
lines. Large diameter line pipe can range up to 120 inches in
but the majority of demand is for pipe between 24 and 48 inches. The large diameter line pipe segment is dependent on the existence of large pipeline projects, which means the business tends to experience periods of high activity and periods where there are no projects requiring pipe. Demand for transmission pipe tends to fluctuate considerably from year to year due to barriers such as obtaining environmental approvals and rights of way, and is dependent on a small number of large pipeline construction projects to generate demand. In general, however, pipeline construction spending is greatest when energy prices and well drilling activity are high.

OCTG are the steel casing, tubing and drill pipe products used in oil and gas wells and in downhole drilling applications. While the vast majority of OCTG are produced in small diameters, well casing and riser pipe can be manufactured at diameters of up to 26 inches, qualifying as large diameter for the purposes of this study. Casing pipe is
wells to reinforce the borehole. Several casings may be used
one inside the other. The outer casing, called the surface pip
water and serves as a foundation for subsequent drilling. Th
pipe that extends vertically in the well, carrying water, steam
called the riser pipe. The OCTG industry is capital intensive
by drilling and inventory cycles, as well as the number of w

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TABLE IV-3

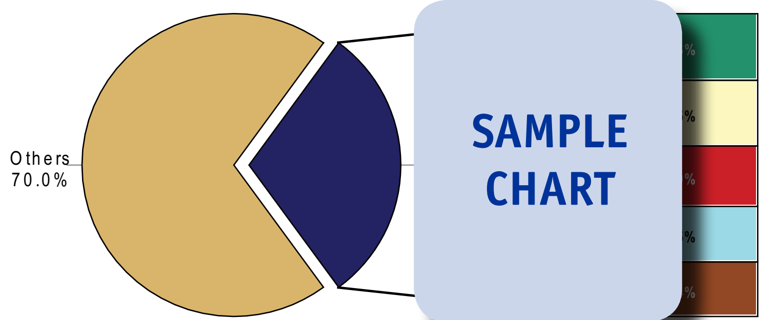
LARGE DIAMETER PIPE DEMAND BY MATERIAL IN POUNDS (million pounds)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Large Diameter Pipe Demand (mil ft)					.0
lb/foot					78
Large Diameter Pipe Demand					50
Concrete					00
Steel					50
Ductile Iron					50
HDPE					40
PVC					00
Fiberglass & Other					00
$/lb					27
Large Diameter Pipe Demand (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]50

CHART V-1

US LARGE DIAMETER PIPE MARKET SHARE BY COMPANY ($6.1 billion, 2010)



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Sample Profile, Table & Forecast

TABLE III-4

LARGE DIAMETER STORM SEWER PIPE DEMAND BY MATERIAL (million dollars)

Item	2000	2005	2010	2015	2020
Urban Population (mil persons)	2				.4
$ pipe/capita					.4
Large Diameter Storm Sewer Pipe Dem					30
Concrete					35
Corrugated Steel					30
HDPE					20
Other					95
$/foot					35
Large Diameter Storm Sewer Pipe (mil					.5
% storm sewer	52.1			47.5	46.1
Large Diameter Pipe Demand (mil ft)	180.3	189.6	148.0	185.5	205.0

SAMPLE TABLE

COMPANY PROFILES

Independent Pipe Products Incorporated
4949 Joseph Hardin Drive
Dallas, TX 75236
972-641-2080
http://www.indpipe.net

Annual S ... 3/11)
Employ...

Key Pro...

Ind... of high density polyethy... ated products. The Compan...

SAMPLE PROFILE

Independent Pipe competes in the US large diameter pipe through the production of HDPE pipe for potable water, sanitary sewer, mining, industrial, oil and natural gas applications. These pipes are marketed under the DESIGN-FLOW brand name, and are available in diameters of 2 to 36 inches. DESIGN-FLOW pipes feature smooth inner walls, ultraviolet light stability and weatherability. The Company also manufactures DESIGN-FLOW HDPE fittings that can be used with pipes of 1/2 inch to 63 inches in diameter.

The Company manufactures its HDPE pipes at a 275,000-square-foot plant in Dallas, Texas. The Dallas site also houses Independent Pipe's headquarters, customer service, and engineering and development operations. In 2009, this facility had nine extrusion lines and a production capacity of 40 million pounds of HDPE product.

In July 2010, Independent Pipe began operations of a 52,000-square-foot HDPE pipe plant in Abbeville, South Carolina. The facility

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"High density polyethylene pipe demand in large diameter storm sewer applications is projected to rise 5.2 percent per annum to $420 million in 2015. In storm sewer applications, HDPE pipe will benefit from improvements in crush resistance, coupled with the resin's corrosion resistance, durability and light weight in larger diameter uses. Recent code approvals by ASTM International are creating opportunities for corrugated HDPE pipe in large diameter municipal storm sewer applications."
--Section III, pg. 42

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Other Studies

World Plastic Pipe

This study analyzes the global plastic pipe industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by resin (e.g., PVC, HDPE), world regional market and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2748 .... May 2011 .... $6100

Geosynthetics

This study analyzes the US geosynthetics industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., geotextiles, geomembranes, geogrids, geonets, clay liners, preformed), market (e.g., construction, transportation infrastructure, landfills, liquid containment) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2744 .... April 2011 .... $4900

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the $8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

#2746 .... March 2011 .... $4800

Plastic & Competitive Pipe

US demand for pipe is forecast to advance 6.6 percent annually through 2015. Gains will be driven in part by a rebound in construction activity and an improved outlook for state and municipal infrastructure spending. PVC and other plastic pipe will be the fastest-growing pipe material, while steel pipe will remain the leading material. This study analyzes the $28.1 billion US pipe industry, with forecasts for 2015 and 2020 by market, material and plastic resin. It also evaluates company market share and profiles industry participants.

#2738 .... February 2011 .... $5100

Water & Wastewater Pipe

Demand for water and wastewater pipe in the US is expected to rise 5.8 percent annually through 2014. Copper pipe will be the fastest growing product while plastic pipe remains dominant. Building construction will be the fastest growing market, with potable water applications leading gains. This study analyzes the $14.8 billion US water and wastewater pipe industry, with forecasts for 2014 and 2019 by market, application and product. It also evaluates company market share and profiles industry players.

#2634 .... June 2010 .... $4700

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