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Plastic & Competitive Pipe

Industry Study with Forecasts for **2016 & 2021**

Study #2958 | October 2012 | \$5300 | 314 pages

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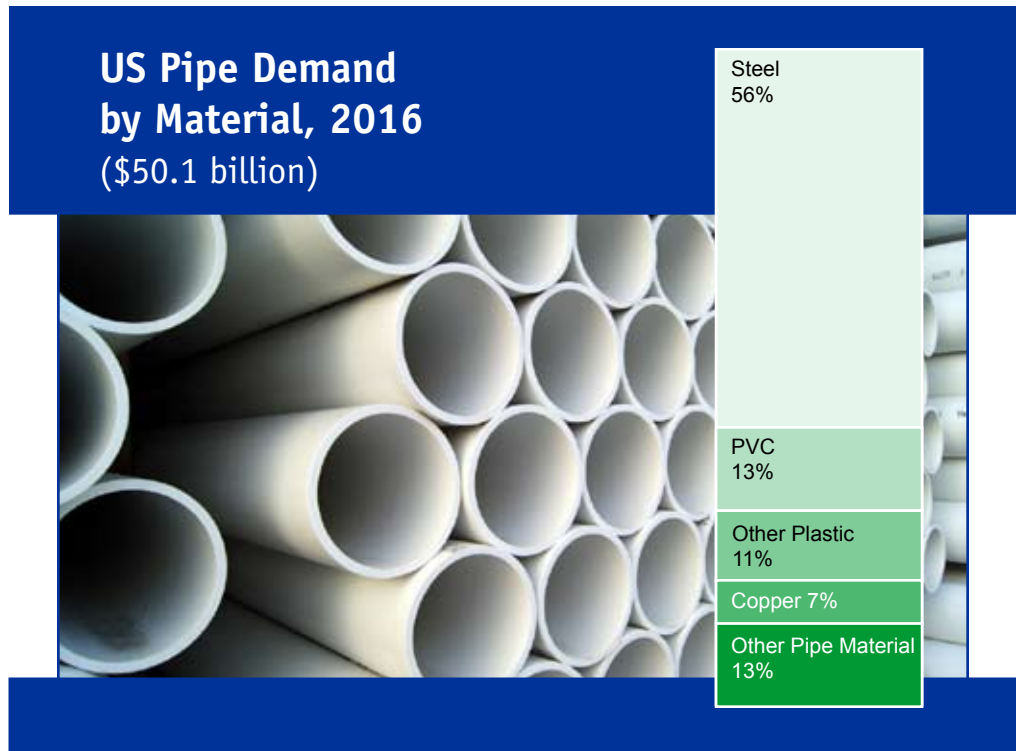
Expanding oil and gas exploration and transmission activity -- especially the development of shale plays -- and the continued need to replace and repair aging water pipe networks, will contribute to growth.

US demand to rise 6.2% annually through 2016

US demand for pipe is expected to grow 6.2 percent per year to \$50.1 billion in 2016, driven primarily by a rebound in building construction. An expansion of oil and gas exploration and transmission activity, especially the development of shale plays, will also boost gains. In addition, the continued need to replace and repair the country's aging water pipe networks will also contribute to growth. In length terms, pipe demand is forecast to expand at an 8.3 percent annual rate through 2016 to nearly 11 billion feet, totaling almost 83 billion pounds. Gains will result primarily from a turnaround in building construction.

Plastic pipe to offer best growth opportunities

Plastic pipe will experience the fastest growth through 2016. Resin improvements that enhance pipe performance will enable plastic pipe to continue to take market share from other pipe materials in demanding applications. Additionally, processing improvements will allow plastic pipe to be a more cost effective option compared to other materials. Polyvinyl chloride (PVC), which accounted for over one-half of all plastic pipe demand in 2011, will remain the leading plastic resin based on PVC's use in small diameter applications in the potable water distribution, sanitary



sewer, and agricultural markets. Going forward, PVC demand will increase at a nearly double digit rate, benefiting from the recovery in building construction activity. High density polyethylene (HDPE) pipe was the second leading plastic pipe in 2011. Advances in HDPE pipe demand will result as the material continues to supplant concrete, PVC, and steel pipe in drainage, storm sewer, and potable water applications.

Steel pipe to remain top material in value terms

Steel pipe will continue to be the leading pipe material in value terms, accounting for \$28.5 billion in 2016. However,

growth in steel pipe demand will trail the pipe market as a whole, since it is not a beneficiary of the rebound in housing construction. Nevertheless, steel will continue to dominate the oil and gas market and is expected to benefit from continued exploration and drilling activity -- especially in shale gas plays. Concrete, ductile iron, and copper pipe are all forecast to post above average growth. Concrete and ductile iron pipe maintain a commanding share of the large diameter sewer, drainage, and water transmission market while copper is the primary material used in refrigeration equipment.

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Sample Text, Table & Chart

PLASTIC PIPE RESINS

Producers

JM Eagle was the largest producer of PVC pipe in the US, supplying roughly one-fourth of the US PVC market. JM Eagle manufactures a variety of PVC pipe products, which are available ranging from 1/2 inch to 48 inches. Specific products from JM Eagle include BIG BLUE large diameter water transmission pipe, BLOC well casing pipe, ULTRA BLUE PVCO pressure pipe, CORR and ULTRA RIB sewer and drainage pipe.

While JM Eagle has established itself as the leading supplier of PVC pipe to the US market, the rest of the industry is fragmented. Other companies active in the US PVC pipe market include CertainTeed (Saint-Gobain), Charlotte Pipe & Foundry, Diamond Plastics, IPEX, National Pipe & Plastics, North American Pipe (Westlake Chemicals), and Prime Conduit (Mitsubishi). Several of these firms specialize in one major segment of the industry. For instance, Prime Conduit primarily produces PVC pipe for electrical conduit applications, while Charlotte Pipe & Foundry produces PVC pipe for use in DWV applications. Other companies, including North American pipe, IPEX, and National Pipe & Plastic, produce a range of PVC pipe.

High Density Polyethylene Pipe

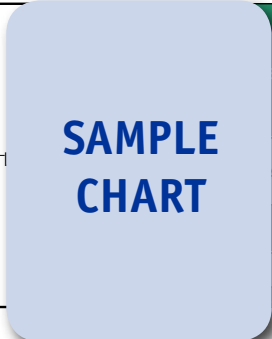
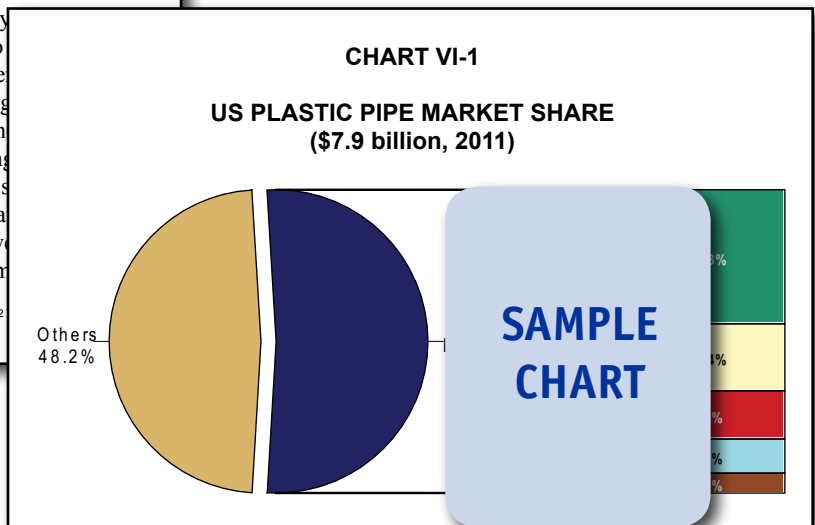
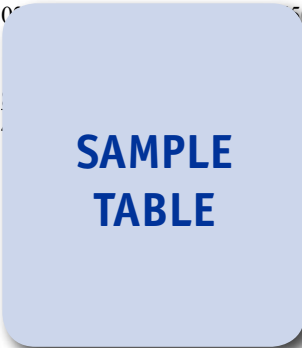
...percent annually...
 ...is expected to...
 ...reaching a total le...
 ...markets, including...
 ...industries, will ben...
 ...structure spending...
 ...market, such as in s...
 ...will also drive growth. HDPE has cost and installation adva...
 ...well as better performance -- than other materials in the sewe...
 ...age and potable water markets, which makes it a preferred m...

175

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TABLE IV-5
STEEL PIPE DEMAND BY MARKET
(million dollars)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil \$)	10	14	15	17	19
\$ pipe/000\$ GDP	0.05	0.05	0.05	0.05	0.05
Steel Pipe Demand	0.5	0.7	0.8	0.9	1.0
Oil & Gas	0.1	0.15	0.15	0.15	0.15
Structural, Mechanical, & Other	0.1	0.1	0.1	0.1	0.1
Industrial Processing	0.1	0.1	0.1	0.1	0.1
Sewer & Drainage	0.1	0.1	0.1	0.1	0.1
Electrical & Other Conduit	0.1	0.1	0.1	0.1	0.1
Potable Water	0.1	0.1	0.1	0.1	0.1
Irrigation	0.1	0.1	0.1	0.1	0.1
Drain, Waste, & Vent	0.1	0.1	0.1	0.1	0.1



Sample Profile, Table & Forecast

COMPANY PROFILES

American Cast Iron Pipe Company

1501 North 31st Avenue North
 Birmingham, AL 35207
 205-325-7701
<http://www.acipco.com>

Annual Sales:
 Employment:

Key Products

American Cast Iron Pipe Company is a privately held company maintains six subsidiaries: American Castings LLC; American SpiralWeld Pipe Company LLC, American Valve & Hydrant Manufacturing Company; Intercast SA; Specification Rubber Products Incorporated; Arizona; and Waterous Company.

The Company is active in the US plastic and competitive pipe industry via the production and sales of ductile iron pipe and fittings, electric-resistance-welded steel pipe, and spiral-welded steel pipe. Specific ductile iron pipe products from ACIPCO include unrestrained and restrained joint pipe. These products feature a variety of protective coatings and linings, which are available from Induron Coatings Incorporated (Birmingham, Alabama) for use in high-performing sewer pipe applications. Unrestrained types from the Company include FASTITE joint pipe, mechanical joint pipe, and FASTITE joint push bar pipe. ACIPCO's restrained ductile iron joint pipe models include FASTITE compression, FLEX-RING boltless, LOK-RING locking groove joint, flanged, coupled, FLEX-LOK ball joint, and grooved and shouldered varieties. Electric-resistance-welded steel pipe is sold under

**SAMPLE
PROFILE**

TABLE III-10

POTABLE WATER PIPE DEMAND BY MATERIAL & MARKET SEGMENT (million dollars)

Item	2001	2006	2011	2016	2021
Building Construction Expenditures (bil \$) \$ pipe/000\$ construction					
Potable Water Pipe Demand By Material:					
Plastic					
Copper					
Ductile Iron					
Concrete					
Steel					
By Market Segment:					
Distribution					
Transmission					
Other					
% potable water Total Pipe Demand					
\$/lb Potable Water Pipe Demand (mil lbs)					
\$/ft Potable Water Pipe Demand (mil ft)					

**SAMPLE
TABLE**

“Demand for potable water pipe will rise 9.2 percent per annum to \$7.0 billion in 2016, a substantial rebound from declines recorded during the 2006-2011 period. In terms of volume, potable water pipe will reverse the declines recorded over the 2006-2011 period, growing 7.7 percent annually to 9.1 billion pounds. Furthermore, potable water pipe will ...”
 --Section III, pg. 78

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OTHER STUDIES

World Plastic Pipe

Global demand for plastic pipe is projected to rise 8.5 percent annually through 2017 to 11.2 billion meters. Construction related applications will drive growth in all global regions, with North America and the Asia/Pacific regions leading gains. HDPE pipe will take market share from dominant PVC pipe in a variety of construction uses. This study analyzes the 7.5 billion meter world plastic pipe industry, with forecasts for 2017 and 2022 by market, resin, world region, and for 24 major countries. The study also evaluates company market share and profiles industry competitors.
 #3015April 2013 \$6300

World Water Pipe

Global demand for water pipe is forecast to increase 7.5 percent per year through 2017 to 10.9 billion meters. China alone will account for one-third of the increase, with other industrializing countries in Asia -- such as India and Indonesia -- and in the Africa/Mideast regions also driving demand. Plastic pipe will be the fastest growing type. This study analyzes the 7.6 billion meter world water pipe industry, with forecasts for 2017 and 2022 by market, product, world region, and for 22 major countries. The study also evaluates company market share and profiles industry participants.
 #3004April 2013 \$6100

Large Diameter Pipe

US large diameter pipe demand will rise 6.2 percent yearly through 2016 to 197 million feet. Storm and sanitary sewers will remain the leading market, while drainage and water transmission will grow the fastest. Concrete pipe will rebound from a depressed base to be the fastest growing material, while HDPE will surpass steel as the most common type. This study analyzes the 146 million foot US large diameter pipe industry, with forecasts for 2016 and 2021 by market and material. The study also evaluates company market share and profiles industry players.
 #2974December 2012 \$5100

Oil & Gas Infrastructure

Demand for oil and gas infrastructure equipment is forecast to rise 6.3 percent annually through 2016 to \$12.1 billion. The dominant pipe segment will benefit from construction of new transmission lines and the need for gathering systems at new drilling sites. Compressors will grow the fastest. The Eastern US will post the strongest regional gains. This study analyzes the US oil and gas infrastructure equipment industry, with forecasts to 2016 and 2021 by product, application and US region. The study also evaluates company market share and profiles industry players.
 #2922 November 2012 \$5100

Water & Wastewater Pipe

US demand for water and wastewater pipe is expected to rise 8.2 percent per year to \$17.8 billion in 2016. The building construction market will lead gains as it rebounds from recent declines, followed by the municipal market. Plastic will be the fastest-growing pipe material as it continues gaining market share over competing products. This study analyzes the \$11.9 billion US water and wastewater pipe industry, with forecasts for 2016 and 2021 by market, application and product. The study also evaluates company market share and profiles industry players.
 #2848 February 2012 \$4900

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