



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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Large Diameter Pipe

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

Study #2974 | December 2012 | \$5100 | 232 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	4
Demographic Trends	8
Construction Outlook	12
Building Construction	15
Nonbuilding Construction	17
Pipe Industry Overview	19
Historical Market Trends	21
Pricing Factors	24
Regulatory & Environmental	
Considerations	26
Water Regulation	26
Government Spending	28
Drilling Regulation	28
Pipeline Regulation	31
Recycling	32
Foreign Trade	34
International Activity	35

MARKETS

General	36
Sewer	38
Sewer Construction Outlook	39
Pipe Demand by Material	42
Storm Sewers	44
Sanitary Sewers	47
Drainage	50
Highway Spending	51
Pipe Demand by Material	53
Oil & Gas	55
Oil & Gas Industry Outlook	57
Pipe Demand by Material	60
Natural Gas	61
Crude Oil	65
Water Transmission	67
Water Use & Withdrawal Outlook	68
Pipe Demand by Material	70
Industrial Processing	73
Manufacturing Outlook	74
Pipe Demand by Material	77

Irrigation & Other	80
Agricultural Outlook	81
Pipe Demand by Material	84

MATERIALS

General	87
Pipe Demand by Length	88
Pipe Demand by Value	90
Pipe Demand by Weight	92
Steel Pipe	94
Markets	96
Oil & Gas	98
Other	101
Producers	102
High Density Polyethylene	104
Markets	106
Producers	109
Concrete Pipe	110
Markets	111
Storm Sewer	113
Sanitary Sewer	115
Drainage & Culvert	117
Water & Irrigation	118
Producers	120
Polyvinyl Chloride	121
Markets	123
Producers	124
Ductile Iron	125
Markets	127
Producers	129
Fiberglass & Other	130
Markets	133
Producers	134

INDUSTRY STRUCTURE

General	137
Market Share	138
Mergers & Acquisitions	142
Manufacturing Requirements	145
Marketing Strategies	147
Channels of Distribution	148
Research & Development	150

Competitive Strategies	151
Cooperative Agreements	152

COMPANY PROFILES

Advanced Drainage Systems	155
American Cast Iron Pipe	158
AMSTED Industries	161
Berkshire Hathaway	163
Can-Clay Corporation	164
CEMEX SAB	166
Charlotte Pipe & Foundry	168
Chevron Phillips Chemical	169
CONTECH Engineered Solutions	171
Cretex Companies	175
Denali Incorporated	177
Duininck Companies	179
Dura-Line Holdings	181
EVRAZ plc	183
Fischer (Georg) Limited	185
Future Pipe Industries	188
HeidelbergCement AG	191
HOBAS Engineering	194
J-M Manufacturing	195
KWH Group	198
Lane Enterprises	199
Logan Clay Products	201
MCP Industries	202
McWane Incorporated	204
Mitsubishi Corporation	206
Mueller Water Products	208
National Oilwell Varco	209
National Pipe & Plastics	213
Northwest Pipe	214
Pacific Corrugated Pipe	216
Saint-Gobain	218
Synalloy Corporation	220
Tenaris SA	221
TrueNorth Steel	223
United States Pipe and Foundry	224
United States Steel	226
Vianini Pipe	227
Westlake Chemical	229
Additional Firms Mentioned in the Study	231

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 7
 2 Population Trends..... 11
 3 Construction Expenditures..... 14
 4 Building Construction Expenditures..... 17
 5 Nonbuilding Construction Expenditures..... 18
 6 Pipe Industry Overview..... 20
 Cht Large Diameter Share of Total Pipe Demand by Material, 2011..... 21
 7 Large Diameter Pipe Market, 2001-2011..... 23
 Cht Large Diameter Pipe Market, 2001-2011..... 23
 8 Large Diameter Pipe Pricing Trends by Material..... 25

MARKETS

1 Large Diameter Pipe Demand by Market 37
 Cht Large Diameter Pipe Demand by Market, 2011 38
 2 Sewer Construction Expenditures. 42
 3 Large Diameter Sewer Pipe Demand by Material & Market Segment . 43
 Cht Large Diameter Sewer Pipe Demand by Material, 2011..... 44
 4 Large Diameter Storm Sewer Pipe Demand by Material..... 47
 5 Large Diameter Sanitary Sewer Pipe Demand by Material..... 50
 6 Highway Spending 53
 7 Large Diameter Drainage Pipe Demand by Material 55
 8 Oil & Gas Indicators..... 59
 9 Large Diameter Oil & Gas Pipe Demand by Material & Market Segment..... 61

10 Large Diameter Natural Gas Pipe Demand by Material..... 64
 11 Large Diameter Oil Pipe Demand by Material 67
 12 Water Use & Withdrawal 70
 13 Large Diameter Water Transmission Pipe Demand by Material..... 73
 14 Manufacturers' Shipments 77
 15 Large Diameter Industrial Processing Pipe Demand by Material 80
 16 Agricultural Indicators 84
 17 Large Diameter Irrigation & Other Pipe Demand by Material..... 86

MATERIALS

Cht Average Large Diameter Pipe Weight per Foot, 2011 88
 1 Large Diameter Pipe Demand by Material in Linear Feet 89
 Cht Large Diameter Pipe Demand by Material in Linear Feet, 2011... 90
 2 Large Diameter Pipe Demand by Material in Dollars 91
 Cht Large Diameter Pipe Demand by Material in Dollars, 2011..... 92
 3 Large Diameter Pipe Demand by Material in Pounds..... 93
 Cht Large Diameter Pipe Demand by Material in Pounds, 2011 94
 4 Large Diameter Steel Pipe Demand..... 96
 5 Large Diameter Steel Pipe Demand by Market 97
 Cht Large Diameter Steel Pipe Demand by Market, 2011..... 98
 6 Large Diameter Steel Oil & Gas Pipe Demand by Type & Market Segment..... 101
 7 Large Diameter High Density Polyethylene Pipe Demand 105

8 Large Diameter High Density Polyethylene Pipe Demand by Market 108
 Cht Large Diameter HDPE Pipe Demand by Market, 2011..... 109
 9 Large Diameter Concrete Pipe Demand..... 111
 10 Large Diameter Concrete Pipe Demand by Market 112
 Cht Large Diameter Concrete Pipe Demand by Market, 2011..... 113
 11 Large Diameter Concrete Storm Sewer Pipe Demand by Size 115
 12 Large Diameter Concrete Sanitary Sewer Pipe Demand by Size 117
 13 Large Diameter Concrete Drainage & Culvert Pipe Demand by Size 118
 14 Large Diameter Concrete Water & Irrigation Pipe Demand by Size 120
 15 Large Diameter Polyvinyl Chloride Pipe Demand..... 122
 16 Large Diameter Polyvinyl Chloride Pipe Demand by Market 124
 17 Large Diameter Ductile Iron Pipe Demand..... 127
 18 Large Diameter Ductile Iron Pipe Demand by Market 128
 19 Large Diameter Fiberglass & Other Pipe Demand by Material..... 132
 20 Large Diameter Fiberglass & Other Pipe Demand by Market 134

INDUSTRY STRUCTURE

1 Large Diameter Pipe Sales by Company, 2011 138
 Cht US Large Diameter Pipe Market Share by Company, 2011 139
 2 Selected Acquisitions & Divestitures 144
 3 Selected Cooperative Agreements 153

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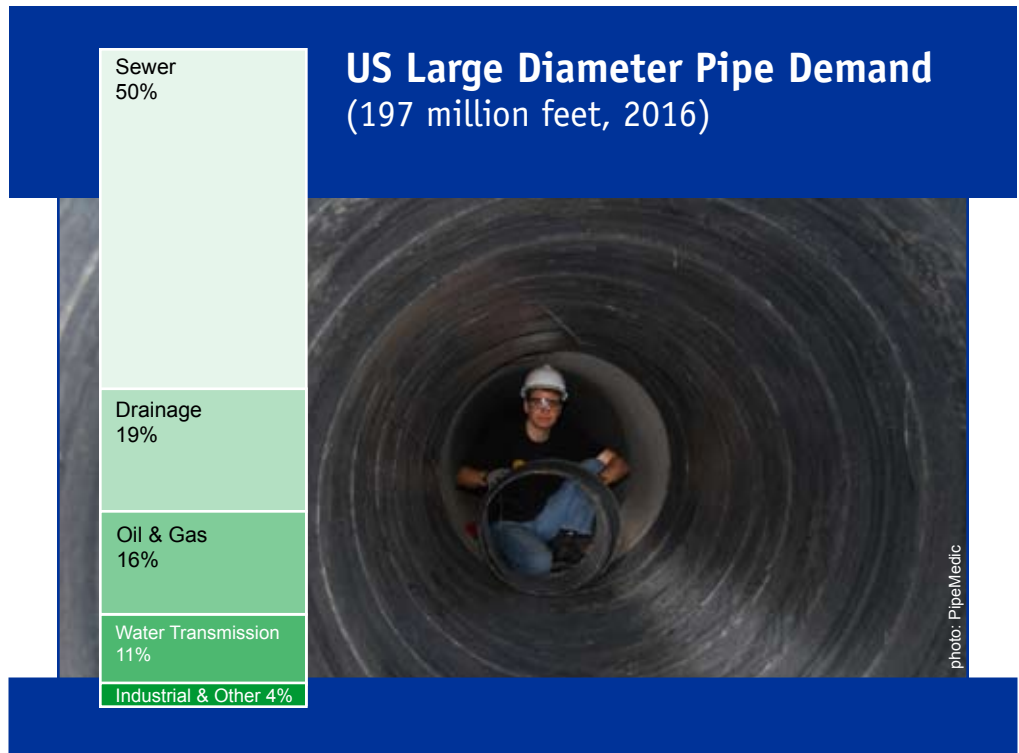
Growth will benefit from the repair and replacement of wastewater infrastructure, as many state and municipal pipe projects that were put on hold during the 2006-2011 period move forward.

US demand to rise 6.2% annually through 2016

US demand for large diameter pipe is projected to rise 6.2 percent annually through 2016 to 197 million feet. Growth will benefit from the repair and replacement of wastewater infrastructure, as many pipe projects that were put on hold during the 2006-2011 period due to state and municipal budget concerns move forward. Additionally, the need to expand oil and gas transmission lines, especially near shale plays and other unconventional wells, will spur growth. Furthermore, improvement in manufacturing activity will boost pipe demand in processing applications.

Concrete, HDPE pipe to be fastest growing types

Steel and high density polyethylene (HDPE) were the two leading large diameter pipe materials in 2011, each accounting for 31 percent of total demand. Opportunities in the oil and gas industry will spur growth for steel through 2016, as it is the preferred material in both line pipe and oil country tubular goods (OCTG) applications. HDPE will post above average gains as it continues to replace other materials in many applications. For example, corrugated HDPE will continue to replace concrete pipe in many drainage applications, benefiting from its ease of installation and light weight. Concrete will post the most rapid growth through 2016, as the material continues to benefit from its established position in most water



markets and its unmatched performance advantages in the largest diameter uses.

Sewers to stay top market, drainage to grow fastest

Sewers, which include both storm and sanitary sewers, will continue to be the leading market for large diameter pipe through 2016, accounting for one half of total demand. Gains in large diameter storm sewer pipe will come in large part from the US population migrating toward the South and West regions of the country. Additionally, EPA mandates will provide opportunities for growth, as regulations regarding combined sewer overflows have become more stringent. As a result, many locales will be required

to replace combined storm/sanitary sewer systems. The drainage market will experience the most robust growth in large diameter pipe demand through the forecast period, benefiting significantly from a rebound in building construction.

By 2016, oil and gas will be the only major market for large diameter pipe that will have a significantly higher level of demand than 2006 levels. Advances will arise primarily from line pipe applications for shale plays and other unconventional wells. Because the infrastructure surrounding shale wells has not been fully developed, many plays utilize trucks to transport material. Pipelines, which provide a continuous flow of product, are a significantly cheaper option.

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Sample Text, Table & Chart

MARKETS

Crude Oil -- Demand for large diameter oil pipe expand at a through 2016 to \$ gains will d the rapid gro and 2011, v sharply and, a completion activity subsequ Oil prices a , while some d large diam trends in explo mission activ decelerate thro period. Despite this, demand for large diameter oil pi arise from unconventional sources, such as in shale p the Bakken and Utica Shale plays are large sources of

Large diameter oil pipe demand is dependent upon crude petro- leum prices; drilling and exploratory activity; and pipeline expansion, maintenance, and replacement activity. Line pipe, which is used for the conveyance of petroleum products, is by far the largest application for large diameter oil pipe and will offer the best opportunity for growth.

Demand for large diameter steel oil pipe will climb 6.5 percent per year to \$1.5 billion in 2016. Steel's attributes include durability, pres- sure resistance, and structural strength. Steel pipe is used as casing, riser, and, to a far greater extent, line pipe. Demand for casing pipe, which is available in diameters up to 30 inches, will benefit from con- ing activity, as well as the increasing average well depth. La riser pipe is utilized in offshore rigs to establish a seal betwe of the wellbore, which is on the ocean floor, and the drilling located above the surface of the water. Riser pipe serves as a the drill stem from the drilling vessel to the wellhead and as tor of drilling fluid from the well to the vessel. Large diamet pipe is used to transport oil from the wellhead to distribution utility systems.

65

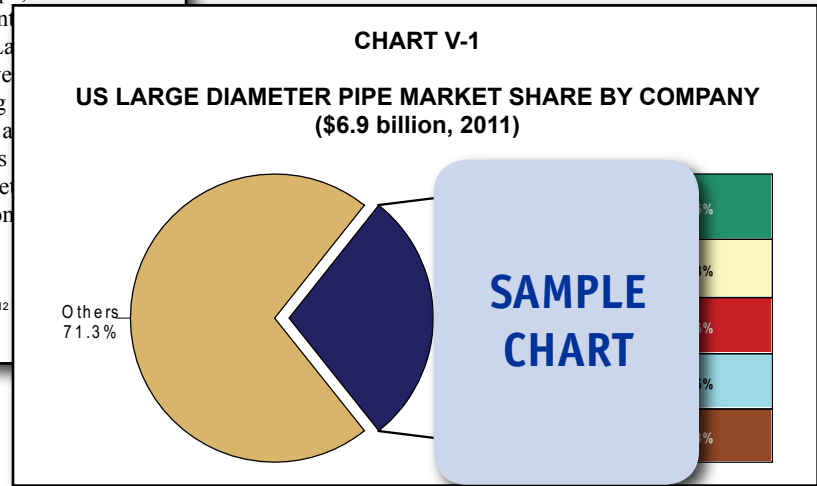
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**TABLE III-4
 LARGE DIAMETER STORM SEWER
 PIPE DEMAND BY MATERIAL
 (million dollars)**

Item	2001	2006	2011	2016	2021
Urban Population (mil persons)					
\$ pipe/capita					
Lg Diameter Storm Sewer Pipe Deman					
Concrete					
Corrugated Steel					
HDPE					
Other					
\$/foot					
Large Diameter Storm Sewer Pipe (mil					
% storm sewer					
Lg Diameter Sewer Pipe Demand (mil					

SAMPLE
 TEXT

SAMPLE
 TABLE



Sample Profile, Table & Forecast

TABLE IV-1
LARGE DIAMETER PIPE DEMAND
BY MATERIAL IN LINEAR FEET
(million linear feet)

Item	2001	2006	2011	2016	2021
Construction Expenditures (bil 2005\$) ft pipe/mil \$ construction expends					
Large Diameter Pipe Demand					
Steel					
HDPE					
Concrete					
PVC					
Ductile Iron					
Fiberglass & Other					



COMPANY PROFILES

United States Pipe and Foundry Company LLC
 3300 1st Avenue North
 Birmingham, AL 35222
 205-254-7000
 http://www.uspipe.com

Sales: \$1.2 billion
 Incorporated: 1952
 Employees: 1,200
 Key Products: Ductile Iron Pipe, Restrained Joint Products, TYTON JOINT

SAMPLE PROFILE

United States Pipe and Foundry Company LLC is a leading producer of ductile iron pipe, restrained joint products, and other related products that are marketed to waterworks distributors, contractors, utilities, municipalities, and other government agencies. The Company was formed in April 2012 when Mueller Water Products Incorporated (Atlanta, Georgia) sold its US Pipe segment to USP Holdings Incorporated, an affiliate of Wynnchurch Capital Limited (Rosemont, Illinois).

The Company participates in the US plastic and competitive pipe market through the manufacture of ductile iron pipe. US Pipe makes ductile iron pipe in diameters ranging from 4 to 64 inches and in lengths of up to 20 feet under such brand names as TYTON JOINT, USIFLEX, TR FLEX, and PROTECTO 401. TYTON JOINT ductile iron pipe utilizes US Pipe's TYTON gaskets, which are circular rubber gaskets that have a modified bulb shape in the cross section. This shape is designed to provide dependable installation while allowing a water-tight seal. This pipe is offered in 4- to 64-inch diameters for water, wastewater, fire protection, and industrial uses. The Company licenses TYTON JOINT pipe and TYTON gaskets to third party manufacturers,

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"US demand for large diameter pipe is projected to grow 7.1 percent annually through 2016 to \$9.8 billion. Growth will be stimulated by the improved outlook for infrastructure construction activity, as the need to replace aging sewer and water pipe networks increases. Large diameter pipe demand experienced a modest decline during the 2006-2011 period, as the economic recession adversely affected construction spending, manufacturing activity, and state and municipal budgets -- all of which are important indicators of pipe demand. However, ..."
 --Section IV, pg. 90

OTHER STUDIES

Oil & Gas Infrastructure

US demand for oil and gas infrastructure equipment will rise 6.3 percent yearly through 2016 to \$12.1 billion. The key pipe segment will benefit from construction of new transmission lines and the need for gathering systems at new drilling sites. Compressors will be the fastest growing type, while the Eastern US leads gains by region. This study analyzes the \$8.9 billion US oil and gas infrastructure equipment industry, with forecasts for 2016 and 2021 by product, application and US region. The study also evaluates company market share and profiles industry players.
 #2922 November 2012 \$5100

Plastic & Competitive Pipe

US demand for pipe is expected to grow 6.2 percent per year to \$50.1 billion in 2016. Plastic pipe will experience the fastest growth, led by PVC. Concrete and ductile iron pipe will lead gains among other material types. Steel pipe will remain the leading pipe material in value terms, based on its dominance in the oil and gas market. This study analyzes the \$37 billion US pipe industry, with forecasts for 2016 and 2021 by market, material and resin. The study evaluates company market share and profiles industry participants.
 #2958 October 2012 \$5300

World Water Infrastructure Equipment

World demand for water infrastructure equipment will rise 6.5 percent per year to \$101.7 billion in 2016. In less developed nations, gains will be prompted by expansion of water supply services. In most developed nations, gains will result from upgrades and repairs to aging sewer and water pipe networks. This study analyzes the \$74.2 billion world water supply equipment industry, with forecasts for 2016 and 2021 by product, application, world region and for 22 major countries. The study also evaluates company market share and profiles industry competitors.
 #2881 May 2012 \$6100

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

World Plastic Pipe

World plastic pipe demand is forecast to increase 7.3 percent annually through 2015. More than two-thirds of all gains will be attributable to the Asia/Pacific region, although the North American market will grow at the same pace as plastic pipe sales in the US recover rapidly. HDPE and smaller-volume plastic pipe will outpace PVC. This study analyzes the 15.8 million metric ton world plastic pipe industry, with forecasts for 2015 and 2020 by resin, world region and for 39 countries. The study also evaluates company market share and profiles industry participants.
 #2748 May 2011 \$6100

About The Freedonia Group

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