Water & Wastewater Pipe

Industry Study with Forecasts for 2018 & 2023

Study #3137 | May 2014 | $5200 | 283 pages
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US water and wastewater pipe demand will rebound from the declines of the 2008-2013 period, in which pipe markets were negatively impacted by decreases in construction spending.

**US demand to rise 7.7% annually through 2018**

Water and wastewater pipe demand in the US will grow 7.7 percent per year to $18.1 billion in 2018. Gains will rebound from declines experienced during the 2008-2013 period, in which pipe markets were negatively impacted by decreases in construction spending. Strong increases in construction activity will fuel gains in the building construction market, whereas the continued need to upgrade and repair the country’s aging sewer and water pipe network will spur gains in the municipal market.

**Increasing water, sewer fees to better fund repair and replacement projects**

In the municipal market, the majority of pipe demand is attributable to the repair and replacement of a large existing infrastructure. Although there is a pressing need for spending on water infrastructure, repairs and replacement are often deferred until a defect manifests itself in the form of a burst pipe requiring immediate action. It is anticipated that water utilities will successfully increase end user water and sewer fees over the forecast period, enabling them to more easily fund repair and replacement projects. Nevertheless, despite this heightened investment, the nation’s water infrastructure is expected to remain in disrepair due to the advanced age of many current pipelines.

**Housing recovery to drive building construction uses**

In the building construction market, demand for water distribution and service pipe was severely constrained as new housing construction declined precipitously from 2006 through 2009, and nonresidential building activity contracted at double-digit rates in 2009 and 2010. A strong recovery will occur in the housing market, with the number of housing starts expected to post double-digit gains through 2018, spurring demand for water pipe, particularly distribution and service pipe. An increase in the number of bathrooms per new housing unit will also provide a boost to demand.

**Metal pipe to lose market share to plastic materials**

Among pipe materials, metal will lose market share to plastic, continuing a long term systemic trend. Demand for each type of metal pipe -- ductile iron, copper, and steel -- is forecast to be less in 2018 than it was in 2008, reflecting increased use of plastic pipe in both small and large diameter applications. High density polyethylene (HDPE) pipe will continue to gain ground on copper and other competing pipe materials. Polyvinyl chloride (PVC) will remain the leading resin used in plastic pipe production due to its dominant position in large diameter applications such as water transmission and drain, waste, and vent.
MARKETS

Municipal

Demand for municipal water and wastewater pipe is expected to grow at a 7.2% annual rate through 2018 to $9.9 billion. Advances in water and wastewater management will benefit from a rebound in public water and sewer infrastructure spending. The condition of much of the nation’s water infrastructure is over a century old in many areas, and state and municipal governments are now facing budgetary constraints that are delaying many major projects. However, as budgets improve and existing pipelines continue to deteriorate, conditions for pipe suppliers will improve.

Municipal water pipe accounted for over 55 percent of all water and wastewater pipe demand in 2013. This market dominates in value terms due to the use of large diameter pipe in many end uses, virtually by definition. Larger diameter pipe costs more per foot than smaller diameters. In addition, this market is less cyclical than the overall pipe industry due to the steady demand for replacement sewer for ruptured lines. This predictability has helped the market to hold up better during the recent recession than the building construction market, which was hit very hard by falling construction expenditures.

Few argue with the need for water infrastructure replacement. In fact, some estimate that well over $1 trillion will need to be spent by 2031 to maintain the existing US water infrastructure. However, the massive cost of these projects is a strain on government budgets. The problem has been exacerbated in recent years by unpaid water bills by utility customers. Thousands of foreclosed homes have contributed nothing to city budgets, while millions of other consumers are unable to pay their water bills. Municipal water suppliers still need to service the lines that connect these homes to the system. In many cases, water rates have been raised for existing customers, creating greater customer dissatisfaction.

TABLE IV-8

DUCTILE IRON WATER & WASTEWATER PIPE DEMAND BY MARKET & APPLICATION
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
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<tr>
<td>Water &amp; Wastewater Pipe Demand</td>
<td>1055</td>
<td>1503</td>
<td>1248</td>
<td>1810</td>
<td>2350</td>
</tr>
<tr>
<td>% cast iron</td>
<td>17.8</td>
<td>18.7</td>
<td>14.8</td>
<td>14.4</td>
<td>13.8</td>
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<tr>
<td>Iron Pipe Demand by Market:</td>
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<td>Building Construction</td>
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<tr>
<td>Potable Water</td>
<td>1160</td>
<td>1800</td>
<td>1130</td>
<td>1600</td>
<td>2000</td>
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<td>Sewer &amp; Drain</td>
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<td>955</td>
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<td>940</td>
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<td>Iron Pipe Demand (mil pounds)</td>
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<td>2434</td>
<td>3071</td>
<td>3484</td>
</tr>
</tbody>
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Chevron Phillips Chemical Company LLC
10001 6 Pines Drive
The Woodlands, TX  77380
832-813-4100
http://www.cpchem.com

Revenues:  $13.1 billion (2013, as reported by company)
Employment:  5,000 (estimated)
Key Products:  high density polyethylene pressure pipe and fittings

Chevron Phillips Chemical Company LLC (CPChem) is a 50/50 joint venture between Chevron Corporation (San Ramon, California) and Phillips 66 Company (Houston, Texas). CPChem operates in two segments: Specialties, Aromatics, & Styrenics; and Olefins & Polyolefins.

The Company is involved in the US water and wastewater pipe industry through the O&P segment, which includes the Performance Pipe division (Plano, Texas) that manufactures polyethylene pipe and related fittings. The division’s pipe is utilized in water and wastewater, industrial, oil and gas gathering, gas distribution, geothermal, and other applications.

For water and wastewater applications, the division manufactures such high density polyethylene (HDPE) pressure pipe products as DRISCOPLEX 1000, DRISCOPLEX 4000, DRISCOPLEX 4100, DRISCOPLEX 4600, and DRISCOPLEX 5100. In general, these pipe items feature heat fusion joints for continuous pipe free of gaskets that may leak, corrosion and impact resistance, and enhanced flexibility. The Performance Pipe division’s DRISCOPLEX 1000 pipe is available in diameters of 26 to 54 inches for use in wastewater, reclaimed water, and other applications. The division’s DRISCOPLEX 4000 and DRISCOPLEX 4600 are available in diameters of 20 to 60 inches for use in water and wastewater applications.

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### Table III-6

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
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<td>Water &amp; Sewer Construction (bil $)</td>
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<td>By Application:</td>
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<td>Sewer</td>
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<td>Plastic</td>
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<td>Sewer &amp; Drain Pipe Demand (mil feet)</td>
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This Freedonia study, **Water & Wastewater Pipe**, offers historical data (2003, 2008, 2013) plus forecasts (2018, 2023) for competitive pipe materials, markets, applications and regions of the US. The study also details market environment factors, analyzes industry structure, assesses company market share and profiles 47 US industry competitors.
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