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Asbestos Pressure Pipes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Diameter (Below 300 mm, 300–600 mm, Above 600 mm), By Pressure Rating (Up to 6 bar, 6–16 bar, Above 16 bar), By Application (Municipal, Agriculture, Construction, Others), By Region, and By Competition, 2020-2030F

https://marketpublishers.com/r/A1E6FEA3D8A4EN.html
Date: August 2025
Pages: 185
Price: US$ 4,500.00 (Single User License)
ID: A1E6FEA3D8A4EN

Abstracts

Market Overview

The Global Asbestos Pressure Pipes Market was valued at USD 3.07 Billion in 2024 and is expected to reach USD 4.12 Billion by 2030 with a CAGR of 4.88% during the forecast period.

The global Asbestos Pressure Pipes Market has historically played a significant role in infrastructure development, particularly in the construction of water supply, sewage, and irrigation systems. These pipes, made from a mixture of asbestos fibers and cement, are known for their high tensile strength, durability, corrosion resistance, and ability to withstand internal pressure—making them a preferred material for transporting potable water and industrial fluids in many developing regions. However, the market has witnessed significant transformation in recent decades due to increasing awareness of the health hazards associated with asbestos exposure, leading to bans and restrictions in numerous countries, particularly across North America and Western Europe. Despite these challenges, the market remains active in several parts of Asia-Pacific, Latin America, Africa, and Eastern Europe, where regulatory enforcement is less stringent or where older infrastructure continues to rely on asbestos cement pipelines.

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Developing economies continue to maintain or replace legacy asbestos pipe networks due to cost constraints and the absence of viable substitutes for low-pressure, non-potable applications. In these markets, asbestos pressure pipes are still favored for their low cost, ease of installation, and long operational lifespan. The demand is further supported by rural infrastructure development programs, particularly in countries like India, Bangladesh, Brazil, and parts of Sub-Saharan Africa. However, even in these regions, increasing public health campaigns and pressure from international organizations are accelerating the shift toward safer alternatives such as ductile iron, PVC, and HDPE pipes. As a result, the asbestos pressure pipes market is gradually transitioning into a replacement and maintenance-focused market rather than new installations.

From a competitive perspective, the global market is relatively fragmented, with several regional players dominating in specific geographies. Notable companies involved in the market include James Hardie Industries, Etex Group (Eternit), Visaka Industries, ARL Infratech, and Hume Pipe Industries, among others. These companies are increasingly diversifying into non-asbestos-based products while managing legacy asbestos operations. Regulatory developments, particularly those aligning with WHO and ILO guidelines, are expected to further reshape the market landscape over the coming decade. Technological advancements in pipe rehabilitation, such as trenchless pipe relining, also offer opportunities to extend the lifespan of existing asbestos pressure pipes without full removal. Overall, while the global asbestos pressure pipes market is declining in terms of new product installations, it continues to hold significance in legacy infrastructure management, especially in cost-sensitive and underserved regions.

Key Market Drivers

Infrastructure Expansion and Urbanization

The rapid pace of urbanization, especially in emerging economies, continues to drive the demand for asbestos pressure pipes due to their affordability and ability to support growing water infrastructure. Asia-Pacific alone accounted for around 30% of the total consumption of asbestos cement pipes in 2024, with developing countries like India and Indonesia actively using them in rural water supply and sanitation projects. In North America, asbestos pressure pipes contributed to approximately 50% of the total asbestos cement pipe market in 2024. India imported over 310,000 tonnes of asbestos in 2016–17, demonstrating the continued reliance on the material. In Brazil, asbestos pressure pipes make up about 25% of the water distribution infrastructure, and in Russia, roughly 30% of legacy water systems still incorporate asbestos-based pipelines.

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This trend highlights how infrastructure upgrades in cost-sensitive regions continue to push demand for asbestos pressure pipes despite health concerns.

Key Market Challenges

Health Risks and Regulatory Pressure

Health concerns around asbestos exposure remain the largest challenge for the industry. In many regions, over 70% of legacy asbestos cement pipe installations exceed fifty years in age, meaning fiber degradation is worsening. In some urban areas, more than 25% of water samples show elevated asbestos levels. Regulatory authorities have declared acceptable limits as low as 0.1 fibers/ml, making compliance difficult for aging networks. In one municipality, annual water safety audits led to 15 recorded exceedances in a year using pipes installed in the 1960s. Insurance claims in utilities with aging asbestos infrastructure rose by 20% annually due to accidental ruptures and contamination. With more than 68 countries banning asbestos usage, new product deployment is highly restricted, leading to heavy regulatory scrutiny even in countries where legacy systems remain.

Key Market Trends

Strengthening Regulatory Frameworks

Many jurisdictions are raising regulatory thresholds and accelerating ecosystem shifts. In 2023–24, at least 15 governments introduced revised water safety standards with tighter asbestos fiber limits. Some regions will phase out asbestos pipe replacement entirely within 10 to 15 years, requiring accelerated remediation planning. Inspection mandates now require risk assessments for over 90% of pipes older than 50 years. In countries tightening enforcement, fines for fiber exceedance rose by 200% in regulatory weight. Utilities are now mandated to submit remediation roadmaps within eight years. Audits of water treatment facilities reportedly increased by 60% in such jurisdictions.

Key Market Players

James Hardie Industries PLC

Saint Gobain

Etex Group

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Visaka Industries Limited

ARL Infratech Ltd.

Hume Pipe Industries

CSR Limited

Maharashtra Seamless Limited

Rathi Group

Vikram Cement Limited

Report Scope:

In this report, the Global Asbestos Pressure Pipes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asbestos Pressure Pipes Market, By Diameter:

Below 300 mm

300–600 mm

Above 600 mm

Asbestos Pressure Pipes Market, By Pressure Rating:

Up to 6 bar

6–16 bar

Above 16 bar

Asbestos Pressure Pipes Market, By Application:

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- Municipal
- Agriculture
- Construction
- Others

Asbestos Pressure Pipes Market, By Region:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - Germany
  - France
  - United Kingdom
  - Italy
  - Spain
- South America
  - Brazil
  - Argentina
  - Colombia

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- Asia-Pacific
  - China
  - India
  - Japan
  - South Korea
  - Australia
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Asbestos Pressure Pipes Market.

Available Customizations:

Global Asbestos Pressure Pipes Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

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