

India Ductile Iron Pipes Market Size Analysis - Market Share, Forecast Trends and Outlook Report (2025-2034)

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Report description:

The India ductile iron pipes market reached approximately USD 3.19 Billion in 2024. The market is estimated to grow at a CAGR of 12.50% in the forecast period of 2025-2034, reaching a value of around USD 10.36 Billion by 2034.

India Ductile Iron Pipes Market Growth

Ductile iron pipes are widely used in public infrastructure. These include irrigation, potable water distribution, sewage, and wastewater transportation among others. As India witnesses economic growth, there is a growing number of smart cities and developmental projects in the country. These include Bharatmala Priyogana and the Narmada Valley Development Project. This is increasing the demand for networks of pipelines and contributing to the size of India ductile iron pipes market.

The market is expected to grow due to factors such as rising urbanisation, governmental initiatives and schemes, and a rising focus on renewable sources of power, such as geothermal power.

Key Trends and Developments

Development of smart cities, rapid urbanisation, rising wastewater treatment projects, and the presence of prominent DI pipe producers are boosting the India ductile iron pipes market development.

Figure: Key Ductile Iron Pipe Manufacturers Capacity (MT) ?in India

Jindal Saw Ltd.

Welspun Corp Limited

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Electrotherm

5,00,000

4,00,000

2,00,000

Jai Balaji Group

Kejriwal Castings Limited

2,40,000

50,000

India Ductile Iron Pipes Market Trends

According to United Nations estimates, by 2035, 43.2% of the Indian population is expected to reside in urban areas at mid-year. Urbanisation is boosting the demand for infrastructural services for sanitation and water supply. Rising awareness of safety and hygiene and the need to tackle unsafe sanitary practices aids the use of DI pipes, thus accelerating the India ductile iron pipes market development. Central and state governments are laying out large-scale pipelines to fulfil the growing demand for water. In October 2023, the government of Haryana proposed an INR 2,267 crore project to lay out a 69km water pipeline, to cater to the drinking water needs of Manesar and Nuh. Further, the government is extensively investing in urban development under its Smart City Mission (SCM). The mission also focuses on developing pan-city solutions that address city-wide challenges, including traffic management, waste management, and water supply.

Industry Outlook

Application of Ductile Iron Pipes in the Infrastructural, Irrigation, and Mining Sectors

According to India Brand Equity Foundation, the index of eight core industries in India for FY23, until September 2022, reveals significant growth and trends in infrastructural development across various sectors. As per India ductile iron pipes industry analysis, electricity leads the growth with an index value of 193. The steel sector follows with an index value of 166, reflecting strong performance driven by construction and infrastructure projects, which have been a priority under government initiatives like the National Infrastructure Pipeline (NIP) and the Smart Cities Mission.

The cement industry, with an index value of 163, also shows substantial growth, supported by increased construction activities and housing projects. The demand for cement is directly linked to infrastructure development in the ductile iron pipes industry in India, including highways, urban development, and rural infrastructure projects. Fertilizers, with an index value of 122, indicate steady growth driven by the agricultural sector's needs and government support for the farming community through subsidies and schemes aimed at increasing agricultural productivity.

This robust performance across core industries reflects the impact of government policies aimed at boosting infrastructure development, enhancing industrial capacities, and driving economic growth. Continued investment in infrastructure and industrial capacities positively impacts the India ductile iron pipes industry revenue.

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The value of mineral production in India, as depicted by the data from the Press Information Bureau (PIB), Government of India, indicates significant fluctuations across various minerals between September 2022 and September 2023. Iron ore continues to dominate the mineral production landscape, with its value increasing from USD 581.1 million in September 2022 to USD 757.34 million in September 2023 which can aid growth of the India ductile iron pipes industry. This substantial rise reflects strong demand for iron ore, driven by robust growth in the steel industry and infrastructure projects. Limestone, another critical mineral, shows a slight increase in production value, from USD 103.251 million in September 2022 to Rs USD 111.683 million in September 2023. The steady demand from the construction sector and cement industry supports this growth.

As of 2023, irrigation in India covers 65 million hectares, accounting for 45% of the net sown area of 141 million hectares. The state-wise distribution of irrigated areas reveals significant regional disparities. Punjab leads with 98.6% of its sown area under irrigation, followed by Haryana at 91.4%. Uttar Pradesh (UP) has 79.7% of its area irrigated, Bihar at 69.3%, West Bengal at 64%, and Tamil Nadu at 58.8%. These figures reflect the reliance on irrigation in states with intensive agricultural practices and high productivity and aid the demand for DI pipes.

Challenges and Opportunities of India Ductile Iron Pipes Market

What Factors are Driving the Growth of the India Ductile Iron Pipes Market?

- Ductile iron pipes are renowned for their high tensile strength, durability, and impact resistance, making them ideal for water and sewage systems.
- Protective coatings, such as cement mortar lining and zinc coating, enhance the lifespan of DI pipes and can increase India ductile iron pipes market value.
- Ductile iron pipes can handle high pressure, making them suitable for long-distance and large-diameter pipeline systems.
- The market for ductile iron pipes is well-established in India, with major manufacturers ensuring consistent availability and support.
- These pipes can be used in a wide range of applications, including potable water distribution, sewage and wastewater systems.

What Challenges are Impacting the India DI Pipes Market?

- Ductile iron pipes are heavier than plastic alternatives, leading to higher transportation and installation costs that can affect India ductile iron pipes demand forecast.
- These pipes require regular maintenance to ensure longevity and performance, adding to lifecycle costs.
- The growing popularity of alternative materials such as Polyvinyl chloride (PVC) and High-Density Polyethylene (HDPE) pipes, which are lighter and often cheaper, poses a significant threat to the market.
- Economic downturns and fluctuations in raw material prices, particularly iron and steel, can impact the profitability and cost-effectiveness of ductile iron pipe manufacturers.
- Advancements in alternative piping technologies and materials could lead to a shift in market preferences.

- The environmental impact of iron mining and production processes can lead to increased scrutiny and regulatory pressures, potentially affecting the industry.

What are the Opportunities in the India DI Pipes Market?

- As per India ductile iron pipes market dynamics and trends, India's ongoing infrastructure development projects, including the Smart Cities Mission and various water supply and sanitation projects, aids the market.
- Rapid urbanization necessitates the expansion and upgrading of water and sewage infrastructure, increasing the demand for durable DI pipes.
- Innovations in production processes and materials can lead to improved performance and cost efficiency, enhancing the competitiveness of ductile iron pipes.
- India can capitalize on its manufacturing capabilities to export ductile iron pipes to other developing countries with similar infrastructure needs.

Competitive Factors in the India DI Pipes Market

- Price sensitivity is a significant factor affecting the ductile iron pipes market share in India. Companies that can offer competitive pricing without compromising on quality can attract large-scale infrastructural customers.
- Implementing advanced manufacturing technologies to produce high-quality pipes more efficiently can be a significant competitive advantage.
- Continuous innovation in product features, such as improved jointing systems and enhanced internal linings, can differentiate a company's products from its competitors.
- Having a widespread and efficient distribution network ensures product availability across diverse geographical regions and aids India ductile iron pipes demand.
- A steady supply of raw materials is critical for maintaining production schedules and meeting customer demands.
- Providing robust technical support and services, such as installation guidance and after-sales service, can enhance customer satisfaction and loyalty.
- Companies that adopt environmentally sustainable practices in manufacturing and sourcing can appeal to eco-conscious customers and comply with increasingly stringent environmental regulations.
- Participation in large-scale government infrastructure projects, facilitated by government tenders and contracts, can significantly boost sales and market share.

Key Players in the India DI Pipes Market and Their Strategic Initiatives

Electrosteel Castings Limited

- Continuously expanding manufacturing capacity and diversifying product offerings to meet a wider range of applications fuels

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the growth of the India ductile iron pipes market.

- Investing in advanced manufacturing technologies to improve product quality and production efficiency.
- Implementing eco-friendly production processes and focusing on sustainability to reduce environmental impact and meet regulatory standards.

Jindal SAW Ltd.

- Increasing production capacity to meet the growing demand from infrastructure development projects offers lucrative India ductile iron pipes market opportunities.

- Investing in research and development to innovate new products and improve existing ones, ensuring they meet international standards.

Tata Metaliks Limited

- Focus on maintaining high standards of product quality and reliability through stringent quality control measures can increase India ductile iron pipes market revenue.

- Emphasizing sustainable production practices and reducing the carbon footprint in manufacturing processes.

- Strengthening customer relationships through excellent service, technical support, and after-sales service.

Lanco Industries Limited

- Investing in research and development to develop innovative products that meet specific project requirements and industry standards.

- Enhancing manufacturing capacity to cater to large-scale infrastructure projects across the country aids demand of India ductile iron pipes market.

Electrotherm (India) Limited

- Diversifying product lines to include various sizes and specifications of ductile iron pipes to cater to different market needs.

- Emphasizing customer satisfaction through high-quality products and excellent customer service.

India Ductile Iron Pipes Industry Segmentation

India Ductile Iron Pipes Market Report and Forecast 2025-2034 offers a detailed analysis of the market based on the following segments:

Market Breakup by Diameter:

- Dn Up To 300
- Dn 300 To 700

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- Dn 700 To 1000
- Dn 1000 To 1200
- Dn Above 1200

Market Breakup by Joint Type:

- Socket and Spigot
- Flanged

Market Breakup by Application:

- Water and Wastewater
- Industrial
- Irrigation
- Mining
- Others

Market Breakup by Region:

- North India
- South India
- East India
- West India

Water and wastewater is sub-divided into underground and surface.

By application, water and wastewater hold a significant market share due to several government initiatives

Governmental initiatives, such as the Atal Mission for Rejuvenation and Urban Transformation, Jal Jeevan Mission, National Mission for Clean Ganga, and Community Drinking Water Schemes, contribute to the growth of the water and wastewater treatment market. Electrosteel Castings Limited (ECL) and Rashmi Metaliks are some of the key manufacturers of ductile iron pipes for use in water supply and sewerage systems in India.

Ductile iron pipes are widely used in industries and power plants as raw water intake pipelines and other in-plant piping solutions. Ductile iron pipes manufacturers in India such as Tata Metaliks, Welspun Corp, and Jindal Saw Ltd., offer various ductile iron pipes for industrial purposes for sale in domestic and international markets. According to the Union Agriculture Ministry of India, 48.6% of the total 140 million hectares of farmlands in India are irrigated. The Indian government is taking various steps such as financial, technological, and management approaches to meet the water demands for agricultural purposes. Consequently, it is supporting the ductile iron pipes market in India. The Indian mining sector is characterised by several small operational mines. The number of mines in India which reported mineral production in 2021-2022 (excluding minor, fuel, and atomic minerals) was 1,319. According to the India ductile iron pipes market report, a rise in mineral exploration and development aids the demand for DI pipes.

Flanged joints to grow at a considerable rate in the India ductile iron pipes market, due to the rising development of underground sewerage networks

The Indian urban population is expanding at a rate of around 2.3% annually. Rapid urbanisation in India is compelling contractors

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to lay pipelines without disturbing the urban infrastructure. Since flanged pipes are restrained jointed pipes, they are ideal to provide significant restraint against longitudinal separation. It removes the need for a thrust block and allows the laying of pipes via horizontal directional drilling by using trenchless technology.

Ductile iron sockets and spigot pipes find use in underground water/sewerage systems. Rising governmental investments in underground sewerage networks aid their demand, thereby propelling the India ductile iron pipes market expansion.

Competitive Landscape

Market participants distinguish their offerings through product quality, installation methods, the quality and source of raw materials, and by delivering robust after-sales services.

Other key players in the India ductile iron pipes market include Tosem Steel Pvt Ltd., Rashmi Metaliks Ltd., Tata Metaliks Ltd., and Jindal SAW Ltd, among others.

India Ductile Iron Pipes Market Regional Analysis

West India holds a significant position in the market due to the presence of a large number of ductile iron pipe manufacturers

Some of the key ductile iron pipe manufacturers in West India include Jindal Saw Limited, Electrotherm (India) Ltd. JS Casting, Pipe House, and Deepshikha Castings Pvt. Ltd. Further, the government initiatives across various end-use sectors such as water and wastewater, irrigation, and mining in Goa, Gujarat and Maharashtra are supporting the ductile iron pipes market in India.

Increased demand for wastewater treatment in South India to fulfil non-drinking needs in cities like Chennai, aids the demand for DI pipes. Further, in North India, government investment in increasing water availability across UP and Haryana positively influences the India ductile iron pipes market outlook.

DI pipes are expected to account for around 1/4th of the pipe market share in India in the near term. Government initiatives and schemes like Jal Jeevan Mission, AMRUT, and Smart City Mission, for providing safe and adequate drinking water are expected to push the demand for pipes upward. The revamping of urban sewerage systems, installation of sanitation facilities in rural areas, and the development of pipe distribution networks in irrigation projects, further aid the growth in sales for DI pipes.

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