

U.S. Highway Construction, Concrete Pipe & Box Culvert Market Update

March 18, 2025



American Road
& Transportation
Builders Association

Key Findings

March 2025

- U.S. highway and bridge construction continues to be strong, with record levels of market activity. Leading indicators, such as state budgets and state and local government contract awards, have leveled off at record levels.
- Market growth is being supported by both the historical increase in federal-aid highway investment and several one-time state funding measures for transportation programs.
- Concrete pipe, as a share of total demand for pipe-related materials is estimated at 50% of market share in 2024. Plastic pipe is 5% of the total pipe market, metal is 12%, and the unspecified/contractor choice is 33%.
- 2024 concrete pipe market share trended upward in the Great Lakes, North Central, South Central, and Southeast regions.
- Final 2024 regional updates will be available shortly, pending final state DOT information for a few states.



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U.S. Highway & Bridge Construction Market Pipeline



New I-270 Mississippi River Chain of Rocks Bridge

Expand Lanes on New Bridge, New Diverging Diamond Interchange

July 2022:

The project is advertised and goes out to bid.

Walsh Construction bids \$496 million and receives the contract award.

Sep. 2022:

Illinois DOT commits \$198 million in federal aid highway funds to the project.

March 2023 to 2025:

On-site construction work is expected to go through 2025.

As work is completed, Illinois pays Walsh Construction with state funds and requests reimbursement from the U.S. Treasury for the federal share of the project.

Project outlays from the state to the contractor and federal-aid reimbursements to Illinois continue until the project is complete.



The bridge, opened in 1966, connects St. Louis and Madison County, Illinois. The new bridge will open as four lanes and eventually will carry six lanes after I-270 east and west are widened..

New I-270 Mississippi River Chain of Rocks Bridge

Expand Lanes on New Bridge, New Diverging Diamond Interchange

Gov. Pritzker Joins Missouri Officials to Celebrate Start of New I-270 Chain of Rocks Bridge

Press Release - Tuesday, June 13, 2023

[PRINT](#) [EMAIL](#)

Joint \$531.6 million project will improve safety and mobility along major freight, travel corridor

GRANITE CITY - Today, Governor JB Pritzker joined the departments of transportation in Illinois and Missouri to celebrate the start of construction on the new Interstate 270 Chain of Rocks Bridge over the Mississippi River, part of a combined \$531.6 million investment to improve one of the country's critical freight corridors. The project, made possible by Gov. Pritzker's historic, bipartisan Rebuild Illinois capital program, will improve safety and mobility while creating good-paying jobs in an area experiencing strong industrial and commercial growth.

"This isn't just an investment for the Metro East region — it's an investment for our entire nation. This major freight corridor connects our ports and railways — essential to maintaining a steady supply chain for Illinoisans, Missourians, and all Americans alike," said **Governor JB Pritzker**. "Up and down the Mississippi River, we're restoring and rebuilding, creating good-paying jobs, and making sure working people have the resources they need to build good lives for themselves."



Source: Photos from Illinois DOT



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Federal-Aid Highway Program Update Through December 31, 2024

\$348B

Total Federal-Aid Highway
Funding, FY22-FY26

\$303B
Formula Funds

\$183B

Total Funds Committed to Date
FY22-YTD FY25

86k+

New Project Commitments

\$240.7B

Formula Funds
Apportionments
FY22-FY25

\$115B

Total Funds
Reimbursed to States

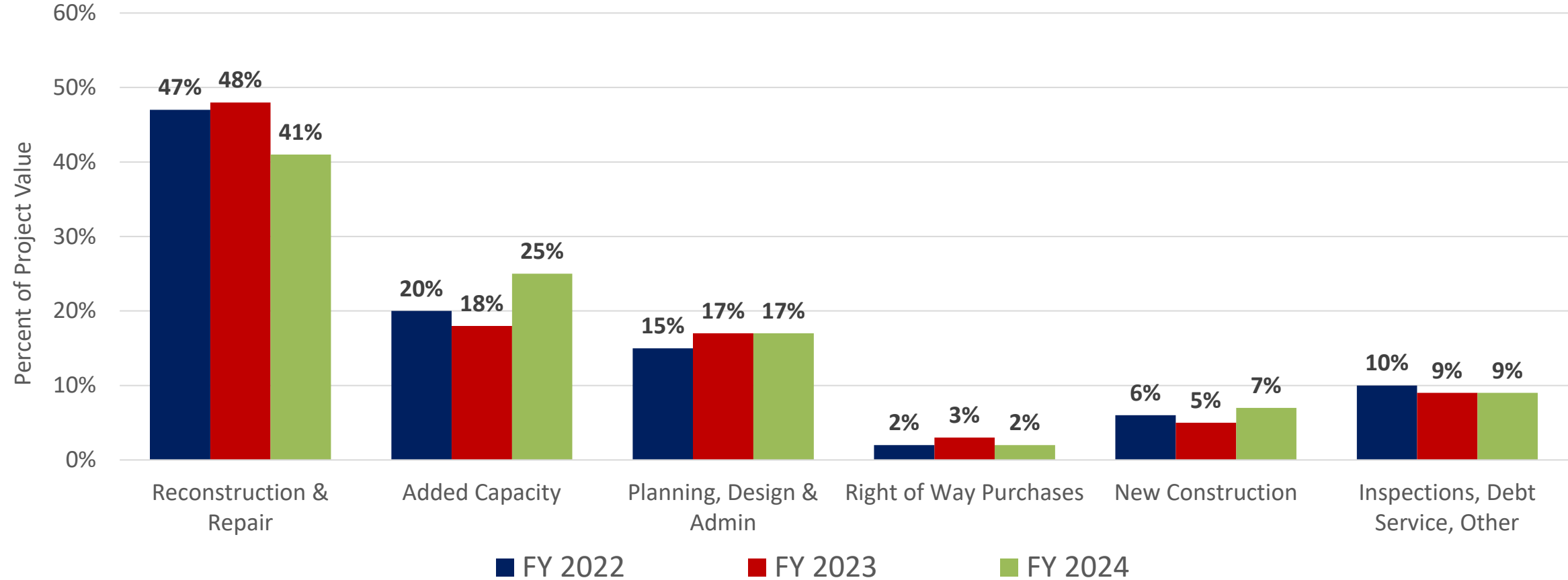
\$45B
Discretionary
Funds

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Source: Data from U.S. Treasury and the Federal Highway Administration. Project commitments are included if the base year of the award (identified in the U.S. Treasury data) . Does not include COVID relief, emergency, or supplemental funds. FY2022 totals include project commitments made using FAST Act extension funds, to provide a full year on year comparison of total projects supported by the federal aid highway program. Total obligations and reimbursements are pooled across both formula and discretionary program.

Use of Federal Funds Can Vary By Year, Depending on Project Mix

Total Value of Federal-Aid Highway Projects by Type of Work
FY 2022 to FY 2024



Source: ARTBA analysis of data provided by FHWA. New project commitment is based on the fiscal year the project was approved by FHWA. Does not include obligations of funds for projects that may be ongoing or were approved in previous years. Includes value of projects using Advance Construction funds.

New Capacity or New Construction, FY 2024

Source: ARTBA and based on fiscal year

**New Capacity/
Construction is
33% or more
of all federal-aid
project spending**

**New Capacity/
Construction is
Up 19%-33%
of all federal-aid
project spending**

**New Capacity/
Construction is
less than 19%
of all federal-aid
project spending**

Source: ARTBA analysis of FHWA data for FY 2024. Date is based on fiscal year that FHWA approved the project for construction activity.

FY 2024 Top Projects Adding Capacity

Major step forward in new I-10 Bridge as DOTD and Calcasieu Bridge Partners achieve financial close on new Calcasieu River Bridge Project

August 15, 2024

I-285/I-20 West Interchange

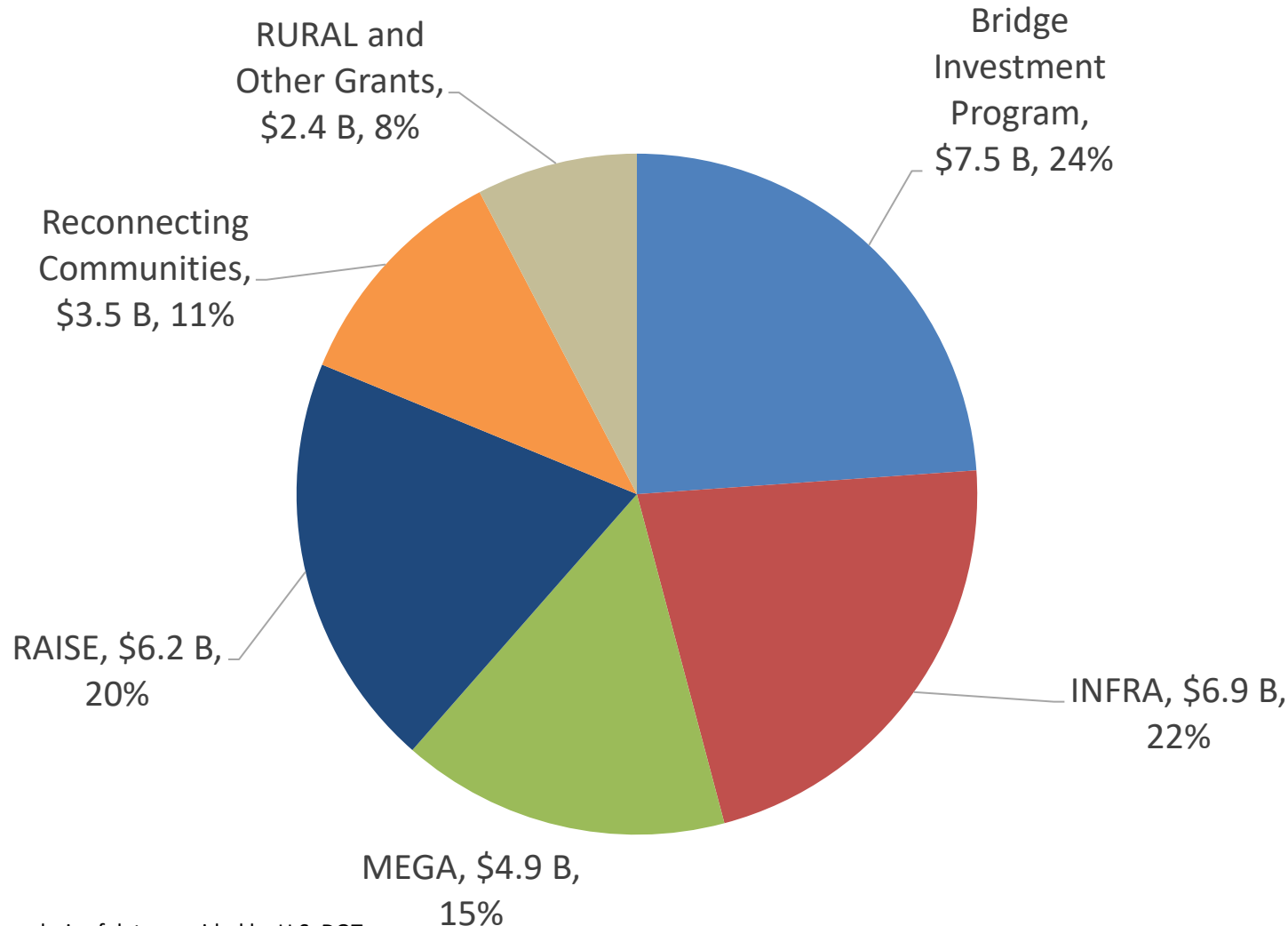
Georgia DOT PI No. 0013918 | Fulton and Cobb Counties

TxDOT breaks ground on transformational I-35 Capital Express Central project



US. DOT has Announced \$31.4B in Major Discretionary Grants

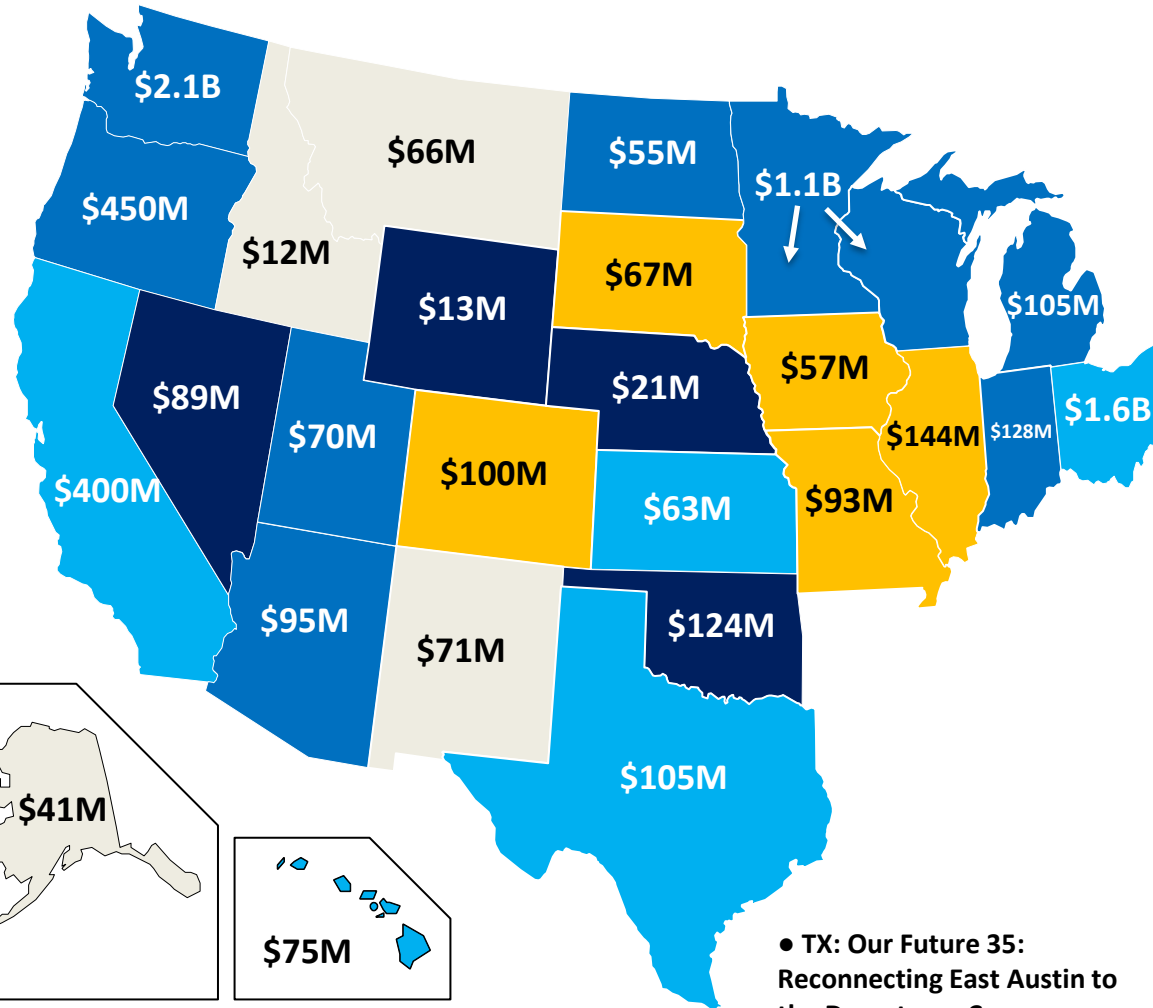
Value of Announced Grants by Program



- U.S. Department of Transportation (DOT) grants under the Infrastructure Investment and Jobs Act (IIJA) account for 13% of total funding under the bill.
- Formula funds account for the remaining 87% of IIJA funding over the five-year period FY 2022 to FY 2026.
- The U.S. DOT has announced \$31.4B in highway and bridge grants under major programs.

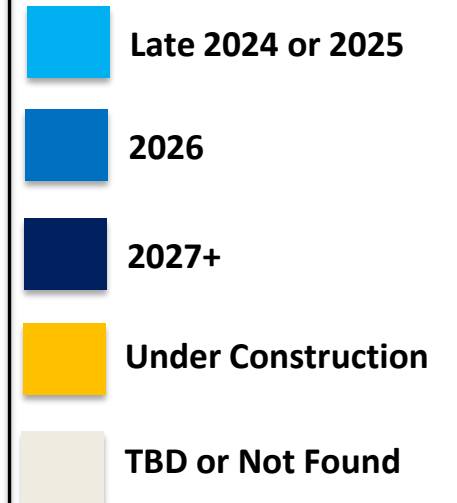
Major Western and Central Region Projects Supported By IIJA Discretionary Grant Funding

Dollar Amounts Indicate IIJA Grant Totals



- NE: Court St. Access & Safety Transformation Initiative
- MN/WI: Blatnik Bridge Replacement Project
- IA: I-380 & Wright Brothers Boulevard Freight Hub
- MO: Improve I-70 Program
- IL: Illinois International Port – Calumet River Bridges
- IN: 80/94 FlexRoad Project
- MI: I-375 Community Reconnection Project
- OH/KY: Brent Spence Bridge Corridor Project

Expected Construction Start



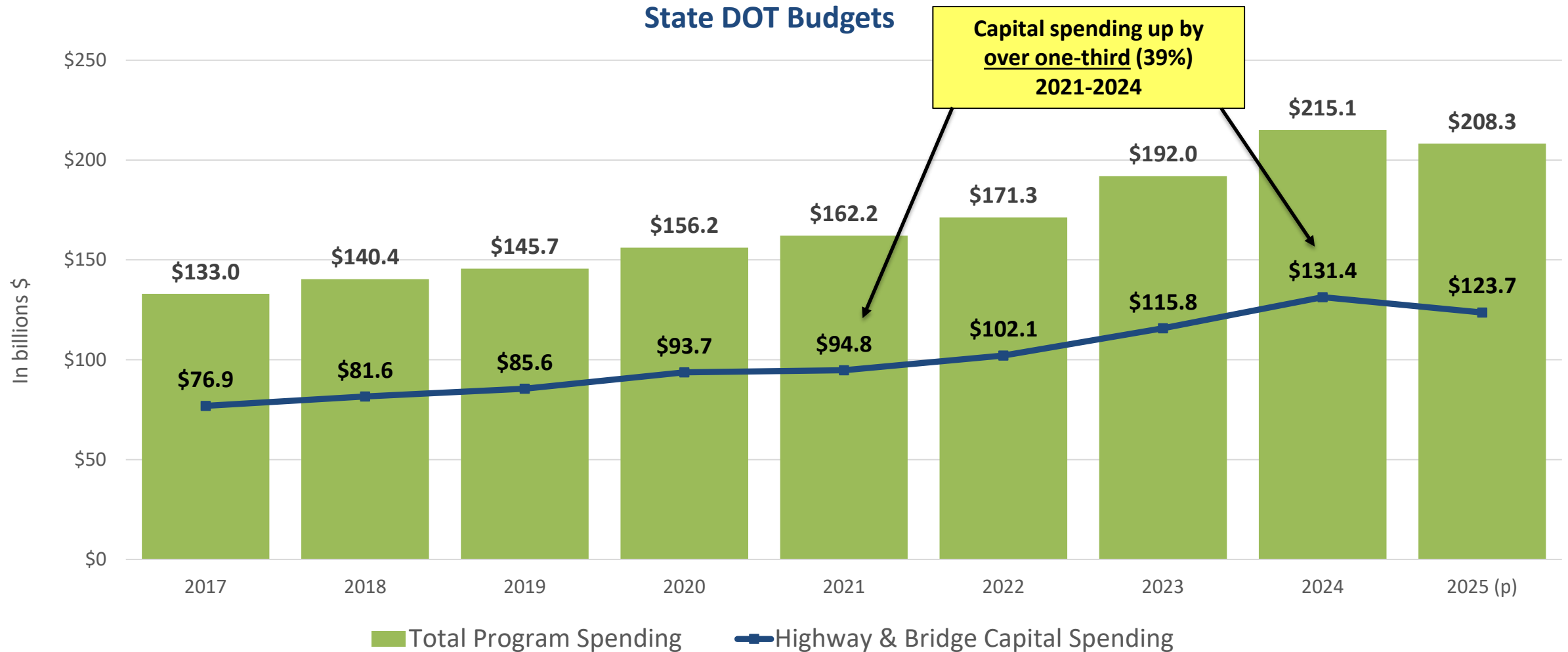
• AK: Alaska West Coast Resiliency Projects

• HI: Hawaii Belt Road Bridges Rehabilitation Project

• TX: Our Future 35: Reconnecting East Austin to the Downtown Core

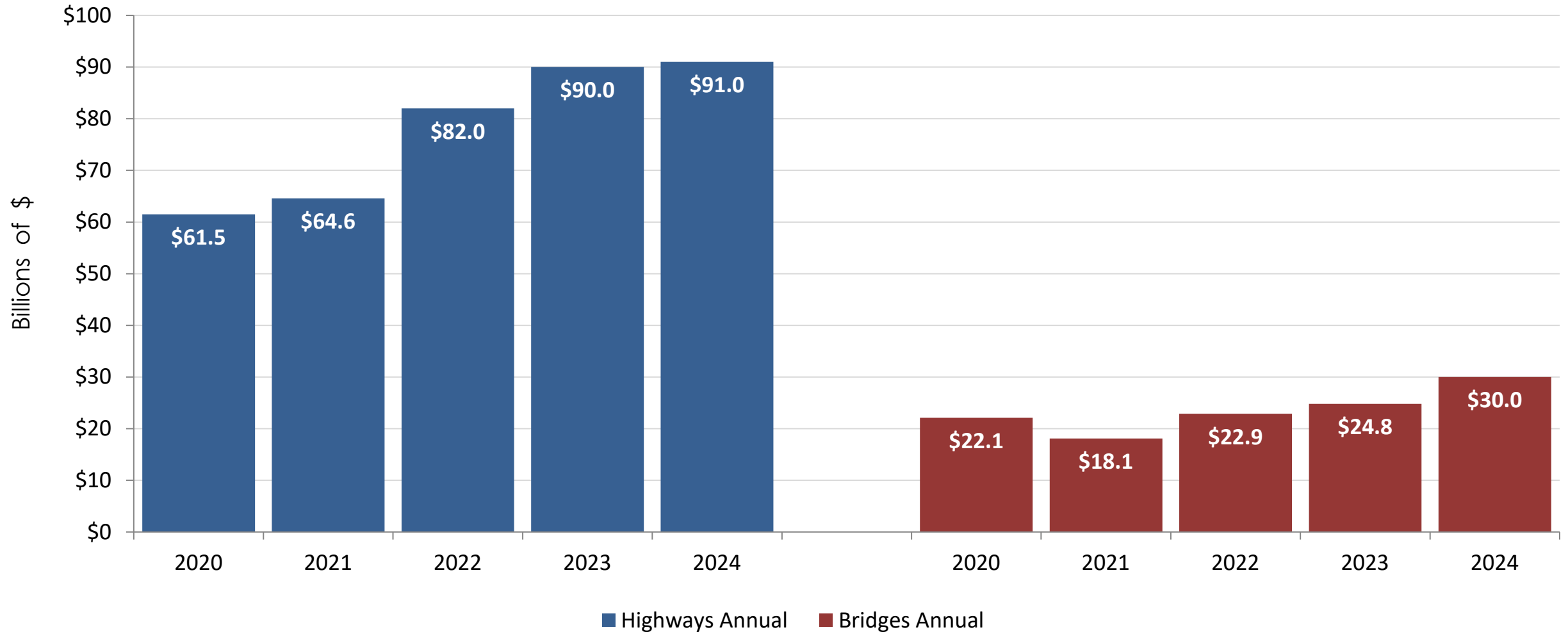
- WA: Interstate Bridge Replacement Project
- OR: I-5 Rose Quarter Improvement Project
- CA: Golden Gate Suspension Bridge Seismic Retrofit
- NV: US-395 & Virginia Street North Valleys
- MT: Mineral County I-90 Improvement Project
- ID: Wood Riv. Valley Mobility Improvements
- WY: I-80/I-25 Interchange Design
- UT: I-15 South Iron County Freight, Mobility and Safety Project
- AZ: Gila River Indian Community I-10 Project
- NM: Nogal Canyon Bridge Replacement
- CO: I-70 Floyd Hill to Veterans Memorial Tunnels Improvements
- OK: Roosevelt Memorial Bridge Investment Project
- KS: 18th St Bridge Replacement
- ND: Theodore Roosevelt Expressway Freight Safety Project
- SD: US 385 Safety Improvements

State DOT Budget Capacity Leveling Off After Major Increases



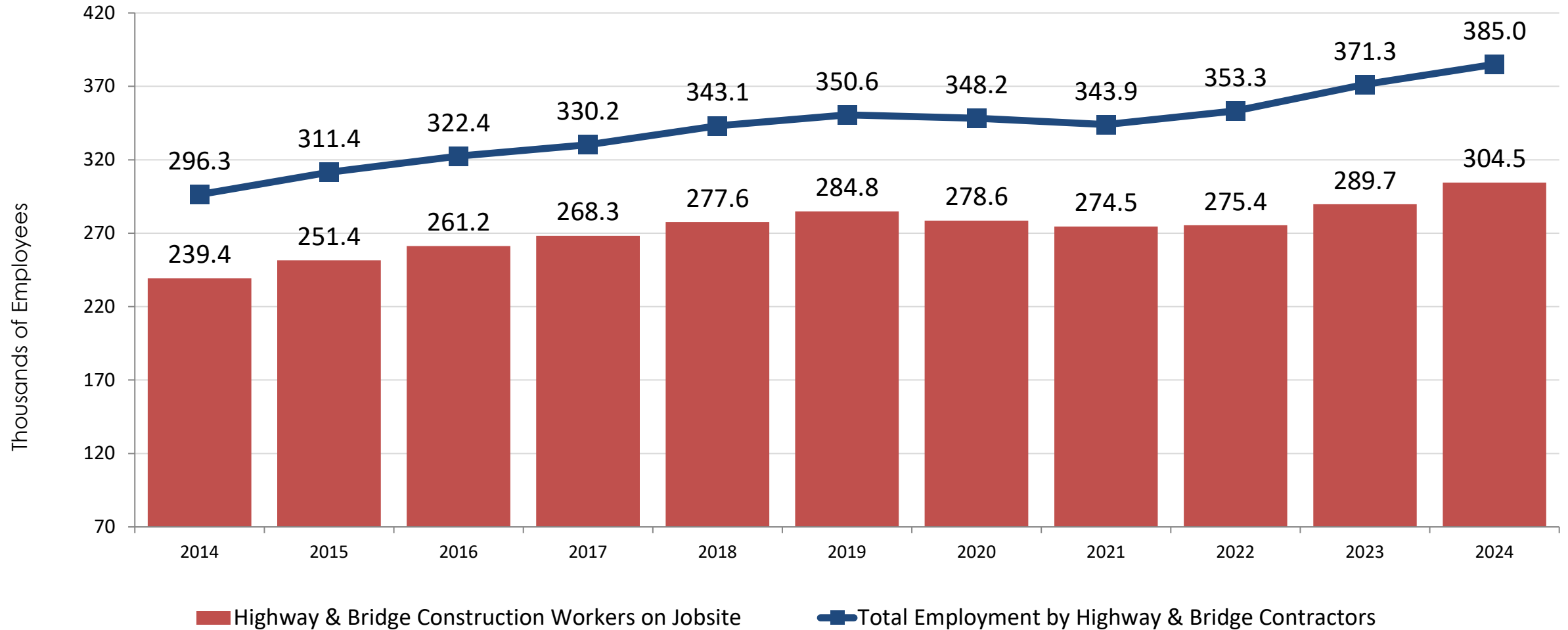
Source: ARTBA analysis of state legislative budgets and DOT work programs. Some FY 2025 data is preliminary, with totals missing for Wyoming and Oklahoma.

Leading Market Indicators at Record Levels: Value of State and Local Government Contract Awards



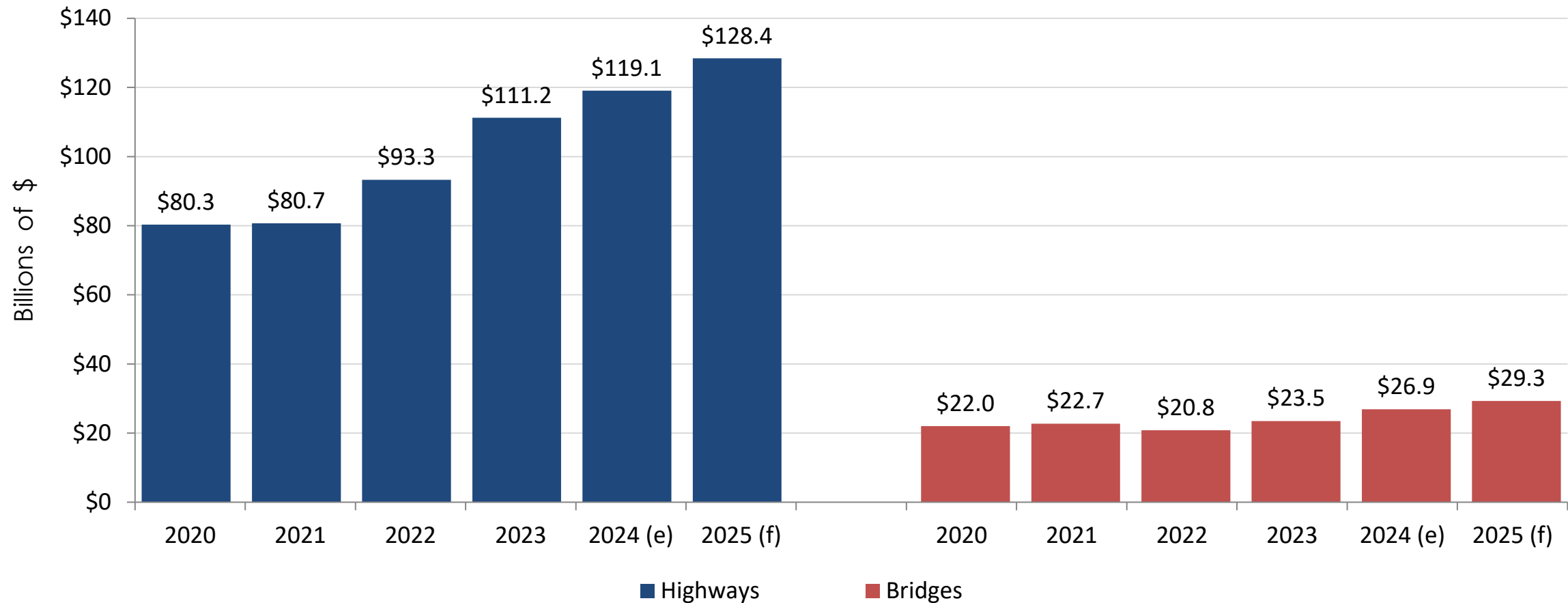
Source: ARTBA analysis of data from Dodge Data Analytics. Includes state and local government contract awards.

Average Employment by Highway, Street, & Bridge Contractors Employment up 41k Since 2021



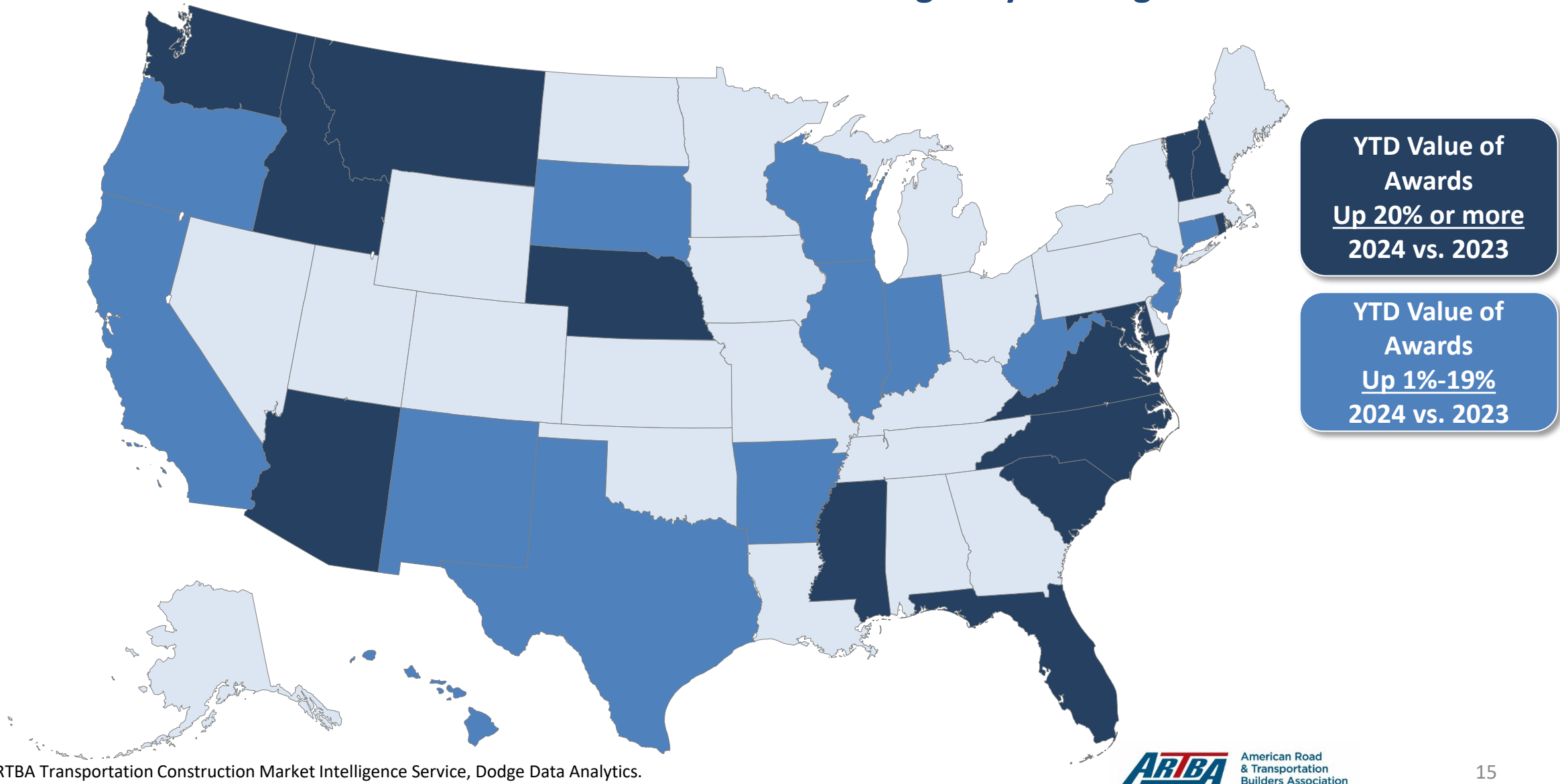
Source: U.S Bureau of Labor Statistics, Current Employment Situation, average employment through November.

Outlook for U.S. Value of Highway & Bridge Construction Activity

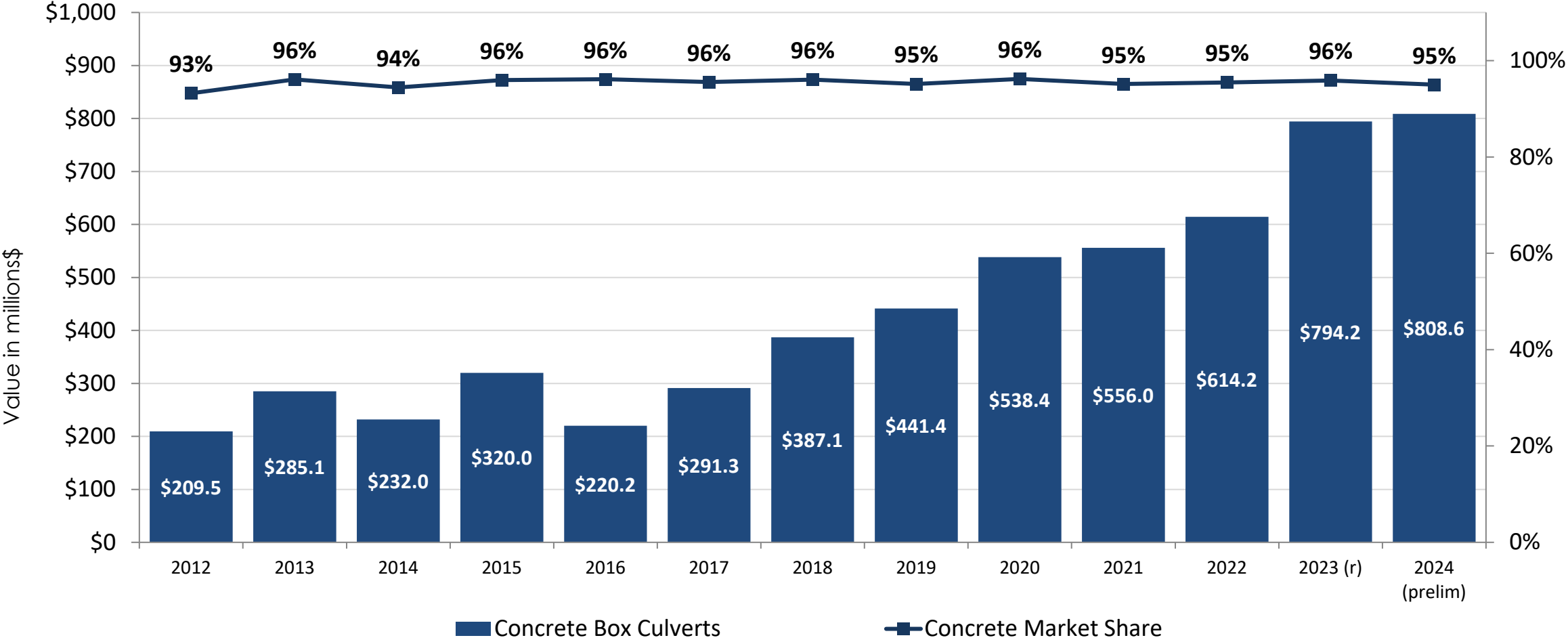


Source: ARTBA outlook of U.S. Census Bureau Value of Construction Put in Place, does not take into account changes in inflation, prices, or project costs. Estimate and outlook published in Nov 2024.

States to Watch in 2025: Growth in Value of State & Local Government Highway & Bridge Awards

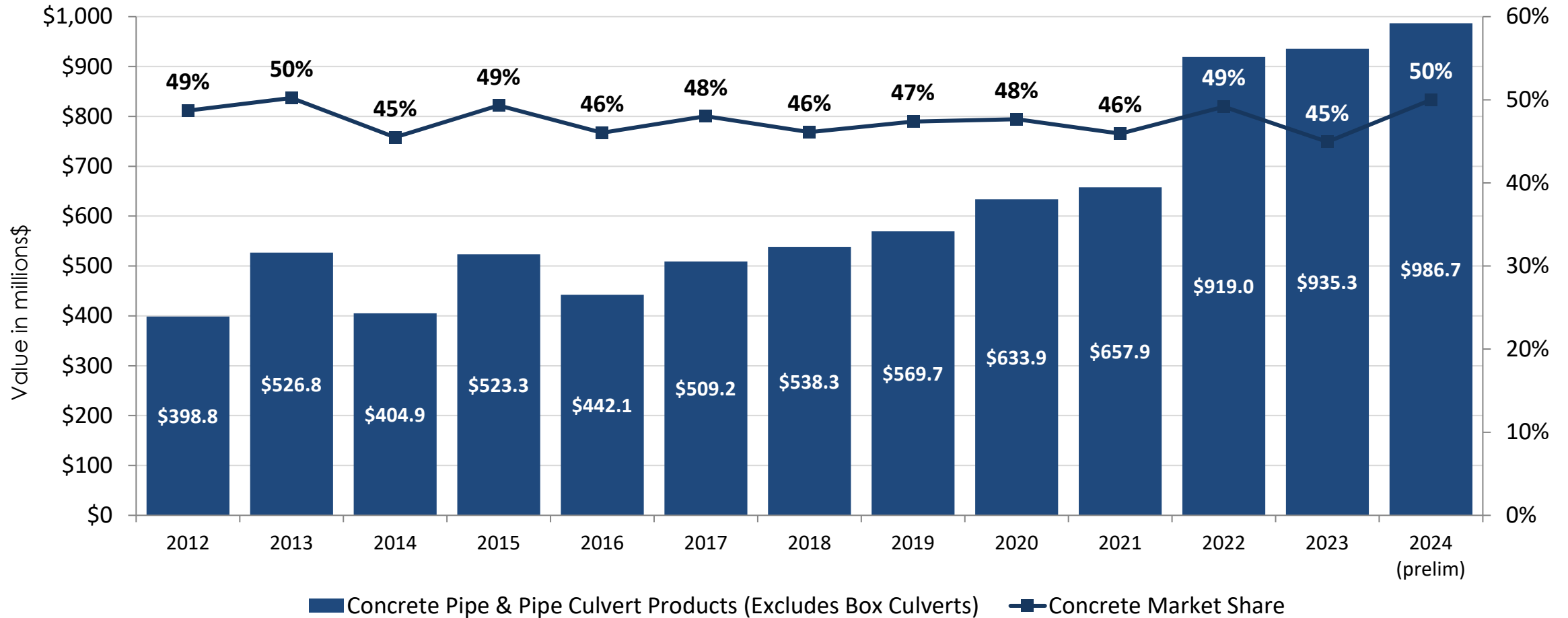


U.S. State & Local Public Sector Estimated Demand for Concrete Box Culverts in Highway & Bridge Construction Projects – Value of Materials



Source: Includes box culverts either classified by the state or based on the product description. Excludes items related to cleaning, inspection, end pieces, or other items. Data for 2023 has been revised. 2024 year to date estimate if for data through June 2024.

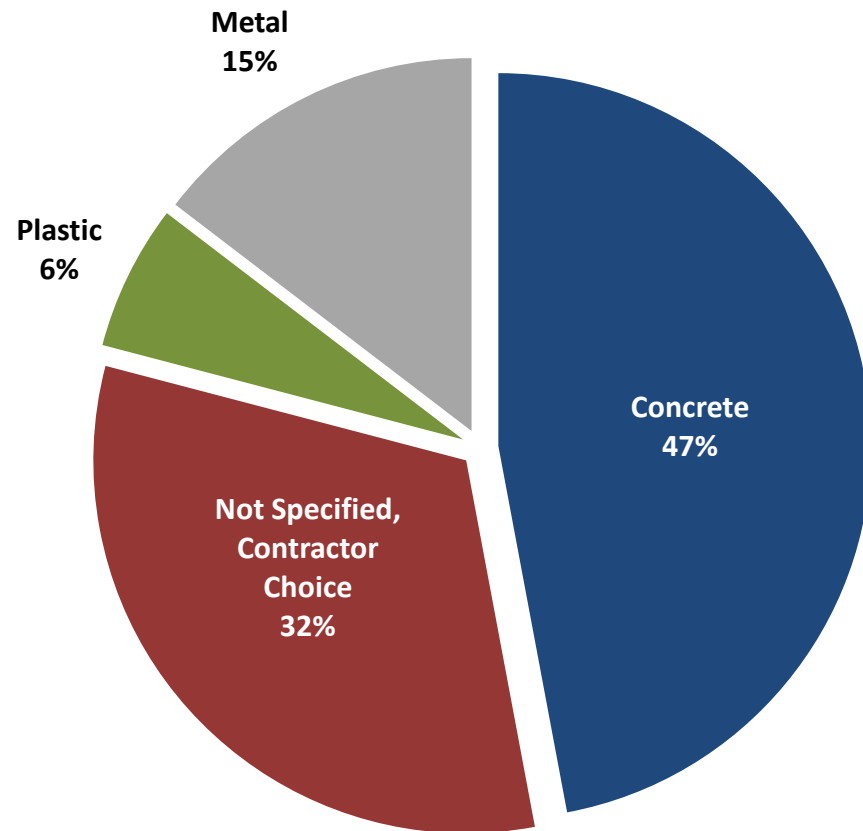
U.S. State & Local Public Sector Demand for Concrete Pipe in Highway & Bridge Construction Projects – Value of Materials



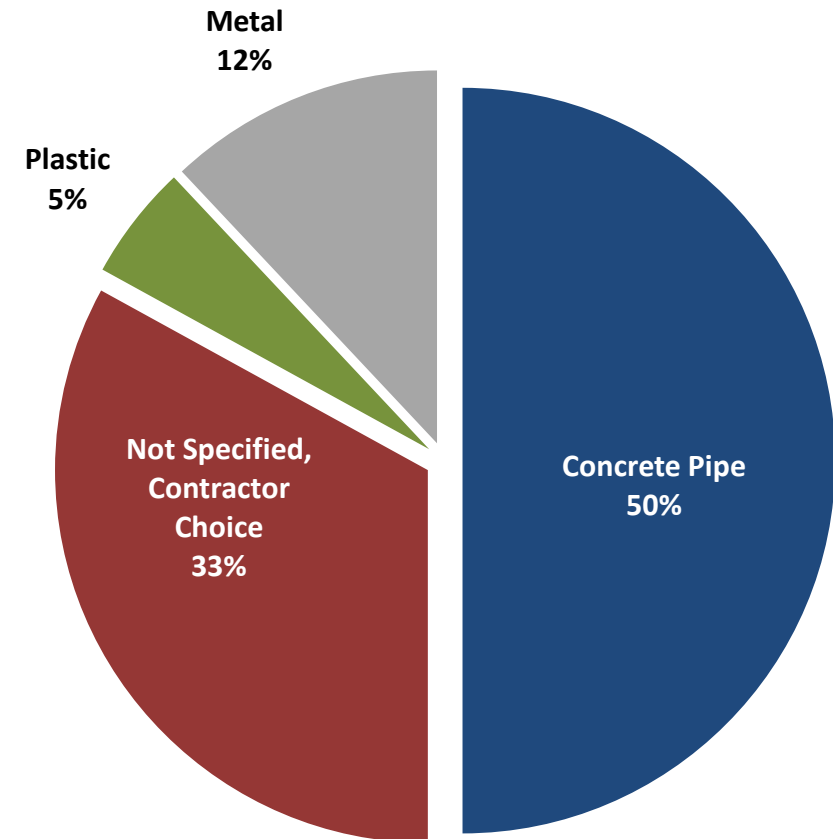
Source: Includes drainage pipe, pipe culverts, and storm sewer pipe. Excludes items related to cleaning, inspection, laying pipe, pipe liners, encasements, or other items. Does not include pipe that is less than 12' in diameter. Detailed data is available for State DOTs in 49 states, does not include Hawaii. Local demand based on total value of state and local government contract awards, and demand for materials in state DOT bids. Past data, bid items, total demand is revised several times per year and may differ from previous estimates. Year to date data for 2024 based on data through June.

State and Local Public Sector Demand for Pipe Materials in Highway and Bridge Construction

Average Material Share of Drainage Pipe Demand,
2019-2023

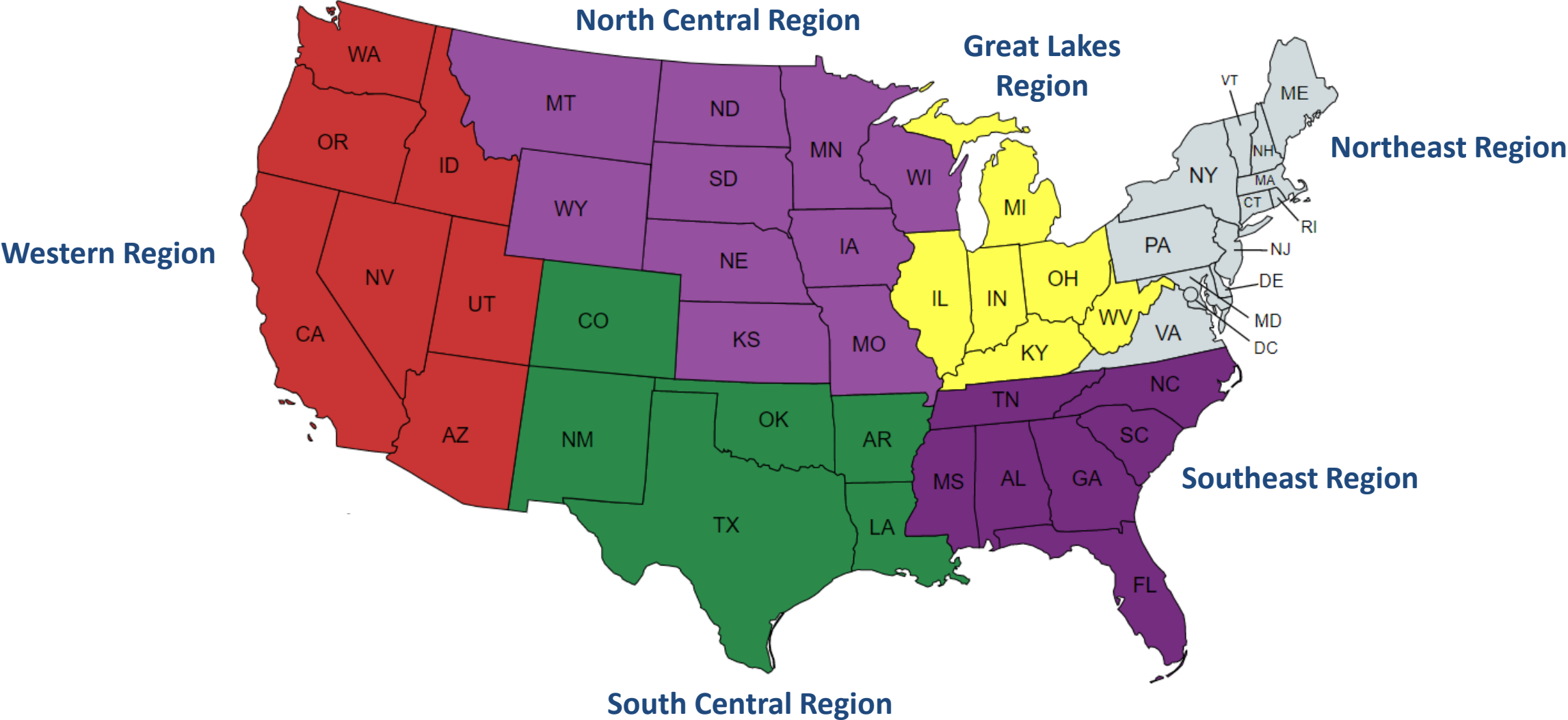


Average Material Share of Drainage Pipe Demand,
In 2024 (preliminary)



Source: Data based on detailed bids for State Department of Transportation (DOT) highway and bridge projects, estimated for local spending. Includes drainage pipe, culverts, and storm sewer materials. Excludes items related to cleaning, inspection, laying pipe, pipe liners, encasements, or other items. Does not include pipe that is less than 12' in diameter.

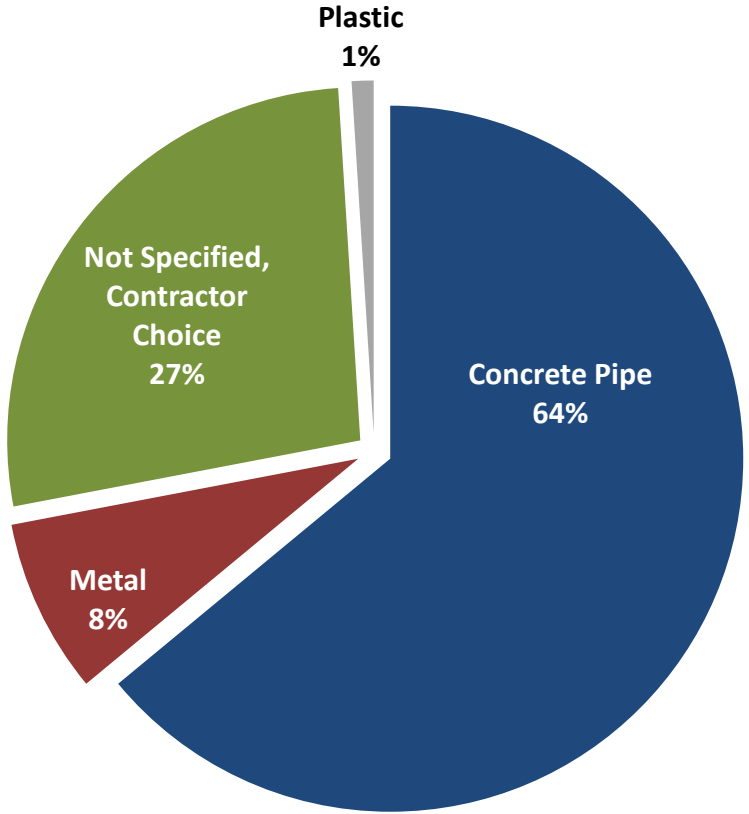
Map of Regional Breakdown



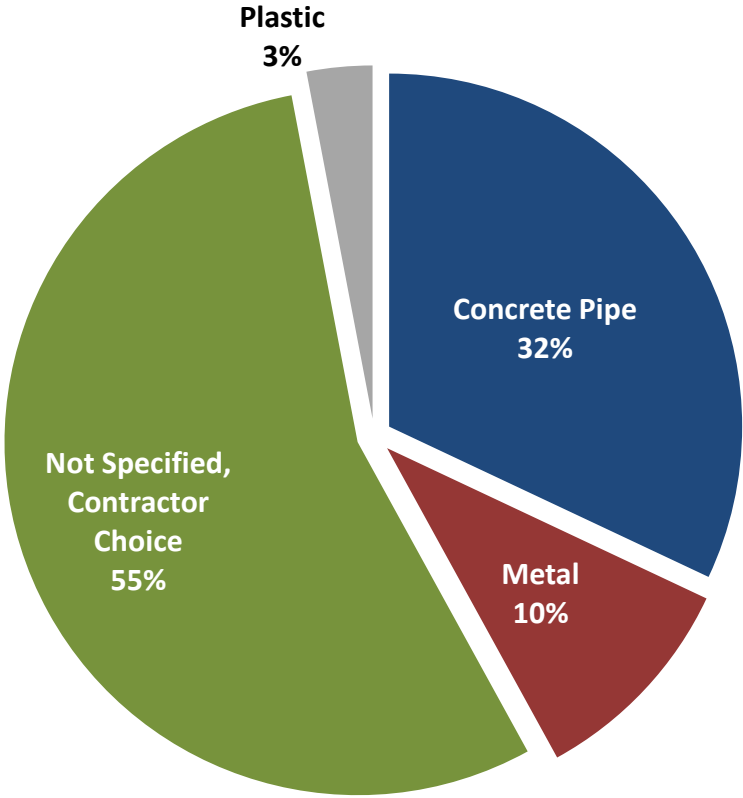
Source: The chart was built using mapchart.net.

State DOT Regional Demand for Drainage Pipe Materials Highway & Bridge Construction Projects in 2024 (preliminary)

North Central Region

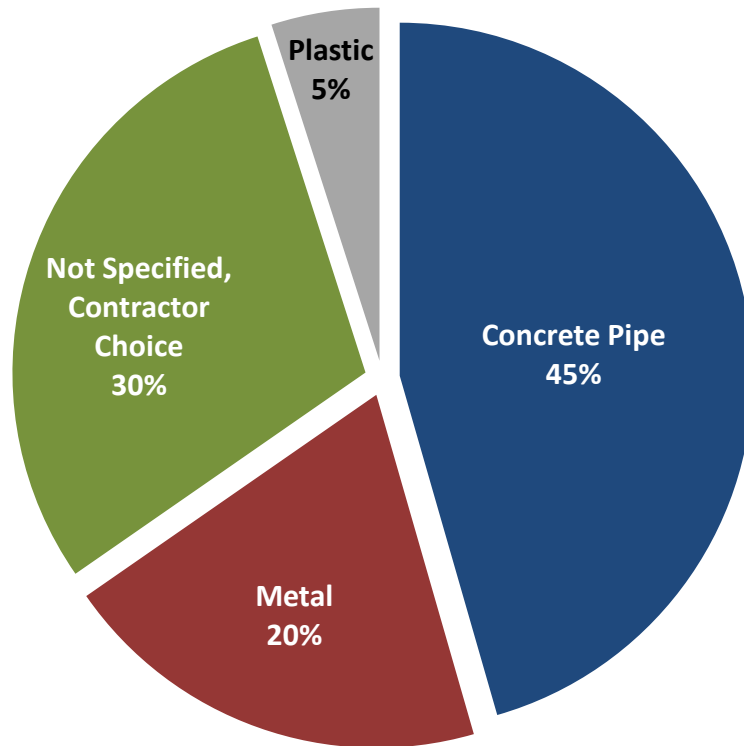


South East Region

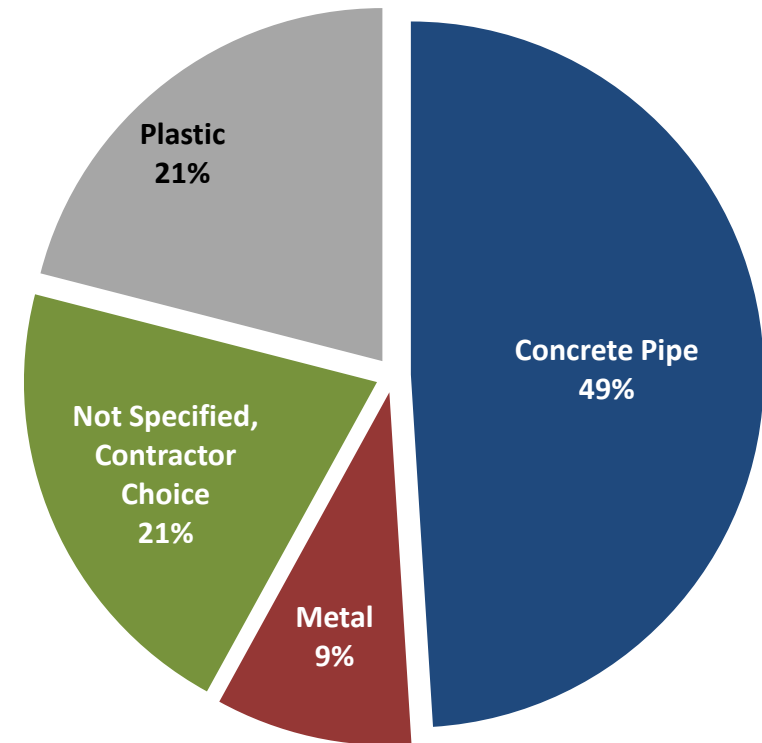


State DOT Regional Demand for Drainage Pipe Materials Highway & Bridge Construction Projects in 2024 (preliminary)

Great Lakes Region

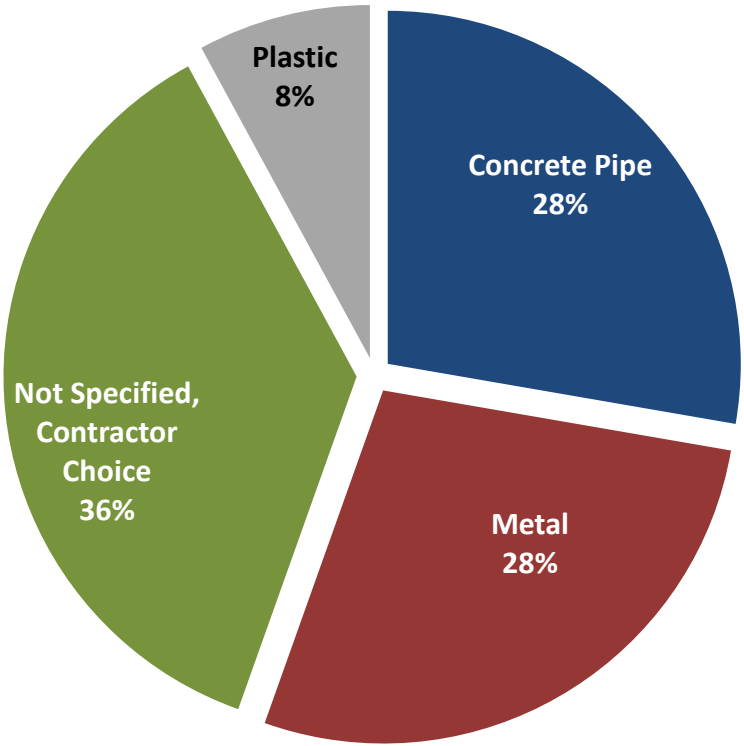


North East Region

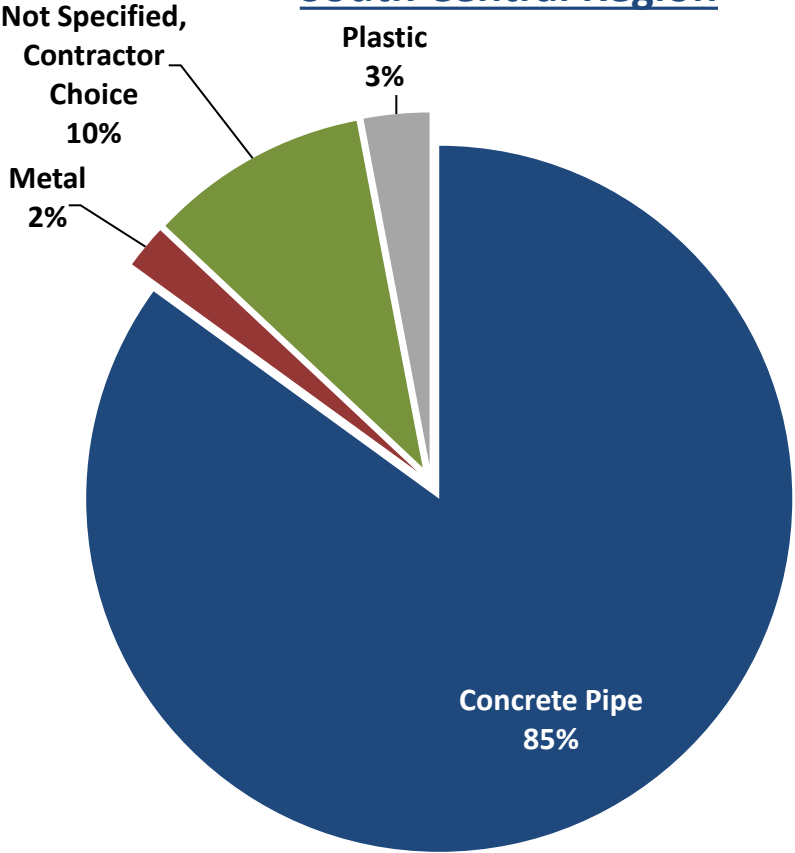


State DOT Regional Demand for Drainage Pipe Materials Highway & Bridge Construction Projects in 2024 (preliminary)

Western Region



South Central Region



Source: ARTBA analysis of State DOT bid tab data, through 2024. Percentages can vary year to year based on the mix of projects. Final total may vary depending on data revision in early 2025.

Methodology

- Pipe and culvert materials are analyzed using state Department of Transportation bid items for the period 2012 through 2024 for 49 states, excluding Hawaii.
- Includes drainage pipe, culverts, and storm sewer pipe. Items related to cleaning, inspection, laying pipe, pipe liners, encasements, and similar items are excluded. Does not include pipe that is less than 12' in diameter.
- Contractor's choice/unspecified includes items where the pay item description does not indicate a material.
- Materials and non-standard bid items are routinely analyzed and updated, so current estimates and revisions may not match with previously published totals.
- Demand for pipe and culvert materials for local projects is estimated based on the state data and the value of local government highway and bridge contract awards.
- For more information, please contact ARTBA Chief Economist Dr. Alison Black at ablack@artba.org. This work was commissioned by ACPA and is an update to the original report published in 2022.



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An Interactive Platform Empowering
Smart Business Decisions