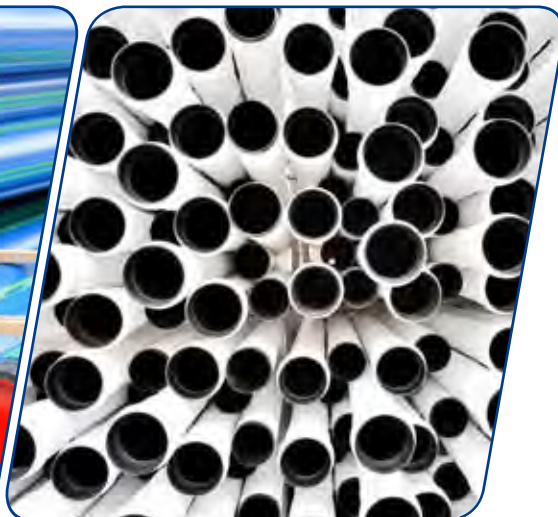
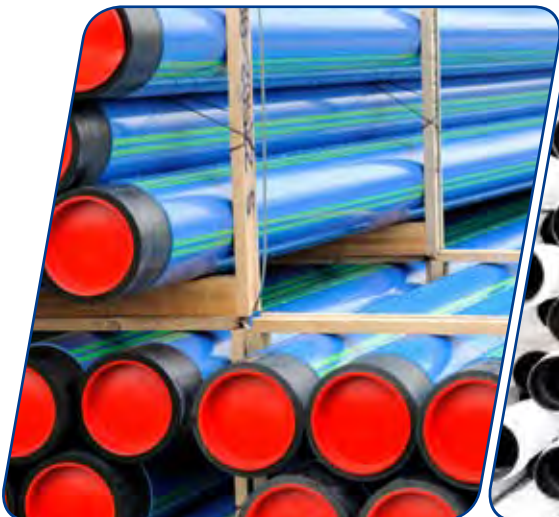
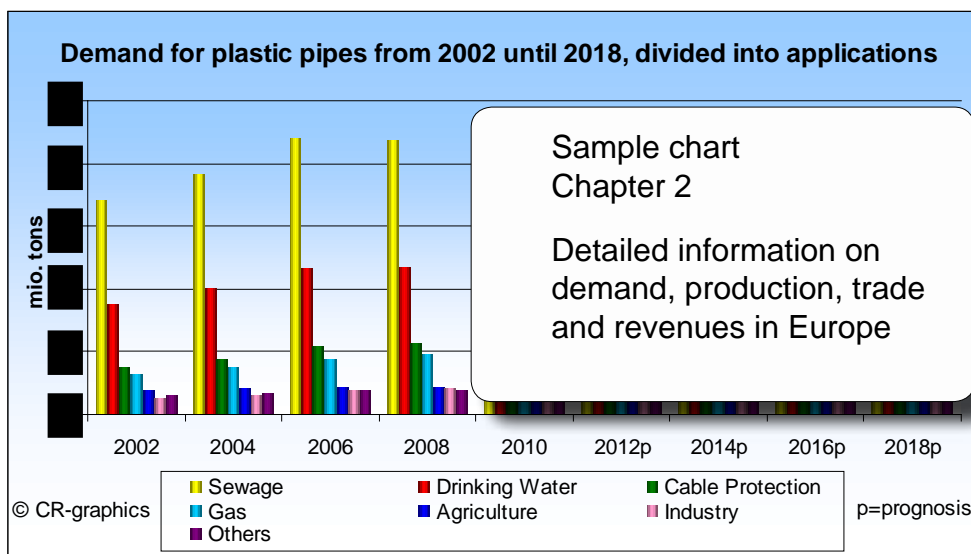


# Market Study: Plastic Pipes



**Ceresana  
Research**

# Market Study: Plastic Pipes



Ceresana Research has scrutinized the European plastic pipe market from top to bottom: we expect revenues will rise to €9.7 billion by 2018. In Western Europe, about 45 to 50% of all plastic pipes are needed for sewage disposal. In Eastern Europe, the share of plastic sewage pipes is significantly lower, at around 32%. In this region, plastic pipes hold a larger share in water and gas supply.

The strong growth of this market can primarily be attributed to the fact that new supply networks are built and older ones are restored, e.g., in the areas sewage, drinking water, gas, or telecommunications. Pipes made of other materials, like metal or concrete, are still increasingly replaced by plastic pipes because they provide better properties and processing options. In addition, the rising price of raw materials, like steel or copper, plays an essential role in the substitution by plastic pipes. In European home sanitary installations, plastic pipes were more frequently used than metal pipes in the year 2005. Pipes made of concrete or vitrified clay still account for 60% in the sewage disposal area.

Germany accounted for 14% of the European plastic pipe market in 2010, followed by Spain, France, Italy, and Turkey. The most po-

pular pipe material was polyvinyl chloride (PVC) with a 45% share, followed by polyethylene (36% share). Especially polyethylene and polypropylene will exhibit strong growth in future, namely by 2 to 3% per year until 2018.

The demand for high-quality pipes made of polyethylene and polypropylene is particularly increasing on the relatively saturated markets in Western Europe, while the demand for PVC pipes is declining. In contrast, PVC is increasingly used in Eastern Europe. Since the East European infrastructure networks have to be expanded, the demand for plastic pipes in this region is growing stronger than in the West.

The Study in Brief:

Vol. I / Chapter 1: A short and concise overview summarizes the most important information on the different types of pipes, plastics, production, joining techniques, applications, and legal situation.

Chapter 2: 30 European countries are analyzed in detail: valuable data and influential factors on demand development. Demand and production are explained, divided into types of plastic, as well as import, export, and revenues. In addition, the report offers a comprehensive insight into market dynamics, innovations, and trends.

Chapter 3: Analysis of the European pipe market, including forecasts until 2018. Furthermore, demand is described and analyzed in detail. Applications include: sewage disposal, drinking water, cable protection, gas supply, agriculture, and industry. In addition, other applications are covered, such as geothermal systems, fire protection, district heating, ventilation, and domestic applications.

Vol. II / Chapter 4 provides a useful list of manufacturers: 135 profiles of pipe manufacturers from Europe – clearly arranged according to contact details, figures, types of pipes and their applications, and production sites.

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#### Introduction

#### 1 Basics

- 1.1 Introduction
- 1.2 Plastics for Pipes
- 1.3 Production
- 1.4 Joining Techniques
- 1.5 Applications
- 1.6 Legal Situation

#### 2 Market Data

- 2.1 Europe
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### 1.5 Applications

Subtopics of this section:

- Civils (underground engineering)
  - o Drinking water supply
  - o Sewage disposal
  - o Irrigation
  - o Drainage and percolation
  - o Gas supply
  - o Data lines / cable protection
- Building technology
  - o Cold / hot water
  - o Discharge lines
  - o Heating / cooling
  - o District heating
  - o Gas internal installation
  - o Others
- Industrial and other applications
  - o Industrial plants
  - o Landfills

Vol. I / Chapter 1

Concise information on plastic types, manufacturing processes, technical properties and fields of applications of pipes, as well as on regulations.

New application possibilities for plastic pipes are constantly being developed. Recent examples are the grid connection of offshore wind power stations, panel cooling for high rise buildings, highly stressed installations for landfills, and rehabilitation systems for damaged, old pipelines. In general, civil, building technology and industrial applications are distinguished. Another classification possibility is to differentiate between supply and disposal applications.

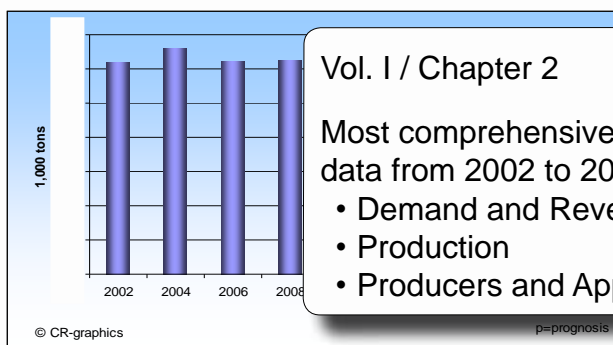
#### Civils (underground engineering)

##### **Drinking water supply**

Drinking water is a valuable resource: On its way from the source to processing and the delivery to consumers, it must not be polluted nor get lost through leaks. Pressure pipe systems are used for the transportation of drinking water because they are resistant against chlorine. Waterworks are often characterized by very corrosive and aggressive conditions – pipes made of PP, PVC-U, and PVDF prove themselves in

### 2.15.2 Production, Import, and Export

Italian plastic pipe manufacturers produced around X tons in 2010 (Graph). We anticipate seeing a demand for X tons in 2018. Production shares will shift in favor of PE pipes. With a share of X% on the Italian market, PVC pipes remain the most important product.



Vol. I / Chapter 2

Most comprehensive market data from 2002 to 2018

- Demand and Revenue
- Production
- Producers and Applications

Graph: Plastic pipe production in Italy from 2002 until 2018

Company	Sewage disposal				Building services/ Sanitary/ Irrigation				Water and gas supply	Industrial pipes	Cable protection	Others
	House & estate drainage	Canals & conduits	Roof drainage	Others	Heating and cooling systems	Distribution systems / Irrigation	Gas systems	Others				
					x	x						
	x				x				x	x		
	x	x			x				x	x		Ventilation

Table: Italian manufacturers of plastic pipes and their applications

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#### 3 Market Data Applications

- 3.1 Sewage Disposal
- 3.2 Drinking Water Supply
- 3.3 Cable Protection
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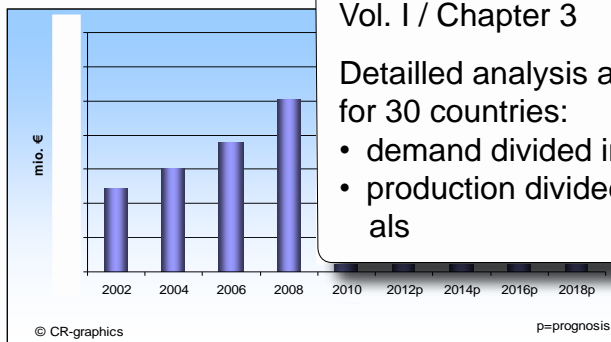
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#### 4 Company Profiles

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- 4.11 Greece (4)
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- 4.14 Latvia (1)
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- 4.27 The Netherlands (5)
- 4.28 Turkey (8)
- 4.29 Ukraine (1)
- 4.30 United Kingdom (7)

#### 2.18.1 Demand and Revenue – Poland

Plastic pipes sold in Poland during the year 2010 had a market value of approx. X million € (Graph). Following an expected annual growth of X%, revenue will most likely soar to X million € in 2018. We expect to see demand increase at an average of X% annually to X tons over the next eight years. Apart from PP and PVC, especially the demand for pipes made of other plastics will enjoy above average growth when compared to other European countries (Table).



Vol. I / Chapter 3

Detailed analysis and forecasts for 30 countries:

- demand divided into materials
- production divided into materials

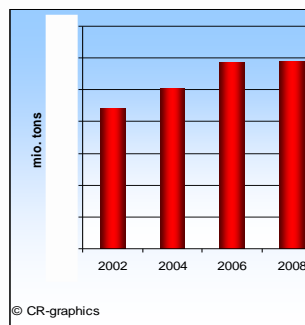
Graph: Revenue from plastic pipes in Poland from 2002 until 2018, in million €

in 1,000 tons	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
PE pipes	X	X	X	X	X	X	X	X	X
PP pipes	X	X	X	X	X	X	X	X	X
PVC pipes	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: Demand for plastic pipes in Poland from 2002 until 2018, divided into materials

#### 3.1.2 Drinking Water Supply – Europe

In the field of drinking water supply, demand of X% annually over the past eight years. With regard to Western Europe, it was followed by Spain, Italy, France, and the U



Vol. I / Chapter 3

Concise market data on applications, structured according to Europe and the biggest countries

- Sewage Disposal
- Drinking Water Supply
- Cable Protection
- Gas Supply
- Agriculture
- Industry
- Others

Graph: Demand for plastic pipes in drinking water supply from 2002 until 2018

Region	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
Germany	X	X	X	X	X	X	X	X	X
France	X	X	X	X	X	X	X	X	X
United Kingdom	X	X	X	X	X	X	X	X	X
Italy	X	X	X	X	X	X	X	X	X
Spain	X	X	X	X	X	X	X	X	X
Rest of Western Europe	X	X	X	X	X	X	X	X	X
Eastern Europe	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: Demand for plastic pipes in drinking water supply – divided into regions, in 1,000 tons

<b>Aliaxis S.A</b>	
Avenue de Tervuren, 270	
1150 Brussels	
Belgium	
Tel.	32 2775 50 50
Fax	32 2775 50 51
Web	www.aliaxis.com
E-Mail	info@aliaxis.com
Divisions, Product Range	<p>The Group manufactures transport and develops management, water conservation, and operates in four market segments:</p> <ul style="list-style-type: none"> <li>• <b>Building:</b> Aliaxis' building water in and around buildings and commercial applications, soil&amp;waste systems, underground drainage systems, and surface drains and gullies as well as rainwater management solutions. In the Americas, Aliaxis is also a major player in electrical and telecommunications ducts and conduits.</li> <li>• <b>Sanitary:</b> Solutions related to bathroom and kitchen applications including waste and traps, WC cisterns, hot and cold water supply, and shower heads.</li> <li>• <b>Industrial:</b> Aliaxis' offering provides solutions for fluid handling and compressed air distribution in targeted industry applications, based on mainly thermoplastic piping systems, completed with valves, actuated valves and flow measurement devices.</li> <li>• <b>Infrastructure:</b> Aliaxis meets the demanding needs of the infrastructure industry in terms of water and gas supply systems, sewage systems, and stormwater management solutions.</li> </ul>

Vol. II / Chapter 4

Extensive company profiles for all manufacturers, as for example Agru Kunststofftechnik, Aliaxis, ALPHACAN SA, Fränkische Rohrwerke, Georg Fischer, KWH Pipe, Pipelife International, Plasticos Ferro, Polypipe, Radius Systems, Rehau AG + Co, Tessenderlo Group, Uponor, Uralita, Wavin.  
 Note: The profiles are assigned to the country in which the company or holding is headquartered. Company profiles also include JV and subsidiaries.

Pipe types	<input checked="" type="checkbox"/> Pressure pipes	<input checked="" type="checkbox"/> Pressureless pipes / Gravity pipes	<input type="checkbox"/> Composite pipes
	<input checked="" type="checkbox"/> All-plastic pipes	<input checked="" type="checkbox"/> Corrugated pipes / Flexible pipes	<input checked="" type="checkbox"/> Protective pipes
	<input checked="" type="checkbox"/> Large diameter pipes / shafts / canals	<input checked="" type="checkbox"/> Double-wall pipes	<input checked="" type="checkbox"/> Multilayer pipes
	<input type="checkbox"/> Ventilation pipes	<input type="checkbox"/> Glass fiber pipes	<input type="checkbox"/> Others

**Production Sites**  
 The Group has more than 100 manufacturing and trading companies in 50 countries. Aliaxis owns companies in North America, Latin America, Europe, Australia, Asia, and Africa.

**Profile Summary**  
 Aliaxis, as an international Group represented in over 50 countries, is primarily engaged in the manufacturing and commercialisation of plastic solutions for fluid transport. It is represented in the market through more than 100 manufacturing and commercial companies with very strong local brands, who employ over 15,000 people generating more than €2 billion of sale.  
 Aliaxis is a privately owned company which was founded as an independent group in 2003. The Group is headquartered in Brussels, Belgium, and its origins go back to Etex France and the acquisition of Nicoll in 1980. Further important developments include the takeover of Marley (in 1999) and Glynwed (in 2001; Durapipe UK, Pipelife GPS, FIP, Ipex), and the split of the Etex Group into two independent companies in 2003: Aliaxis and Etex Group.  
 When dividing revenues by main activity, 14% are accounted for construction products, 37% by pressure systems, 37% by non-pressure systems, and 12% by other products. 47% of annual revenues are generated in Europe, 26% in North America, 14% in Latin America and 13% in Asia, Australia, and Africa. The European companies Aliaxis are situated in Belgium, Denmark, the Netherlands, Germany, France, Great Britain, Italy, Austria, Poland, Sweden, Switzerland, Spain, Czechia, and Hungary.

<b>Plastics, Applications and Connection method</b>							
Plastics	<input checked="" type="checkbox"/> PVC	<input checked="" type="checkbox"/> PVC-C	<input type="checkbox"/> PVC-U	<input checked="" type="checkbox"/> PP	<input checked="" type="checkbox"/> ABS/ASA	<input type="checkbox"/> GRP	
	<input checked="" type="checkbox"/> PE	<input type="checkbox"/> LD-PE	<input checked="" type="checkbox"/> HD-PE	<input checked="" type="checkbox"/> PE-X			
Applications	<input checked="" type="checkbox"/> Sewage disposal			<input checked="" type="checkbox"/> Building Sanitary/ Irrigation			
	<input checked="" type="checkbox"/> House & estate drainage			<input checked="" type="checkbox"/> Heating and cooling systems			
	<input checked="" type="checkbox"/> Canals & conduits			<input checked="" type="checkbox"/> Distribution systems/ Irrigation			
	<input checked="" type="checkbox"/> Roof drainage			<input checked="" type="checkbox"/> Gas systems			
	<input checked="" type="checkbox"/> Others Pumps			<input type="checkbox"/> Others			
Connection method	<input checked="" type="checkbox"/> Permanent connections		<input checked="" type="checkbox"/> Bonding		<input checked="" type="checkbox"/> Other		
	<input checked="" type="checkbox"/> Removable connections		<input checked="" type="checkbox"/> Bolting		<input checked="" type="checkbox"/> Other		
	<input type="checkbox"/> Coupling		<input checked="" type="checkbox"/> Plugging		<input type="checkbox"/> Other		
Type, Applications, Processes, Innovations	<ul style="list-style-type: none"> <li>• PVC, PVDF, PP, and PE pipes for industrial, agricultural, and sanitary services, and sanitary as well as industrial supply pipes. The pipes are manufactured in different diameters and lengths and for different pressure conditions.</li> </ul>						

Vol. II / Chapter 4

Clearly arranged data and facts on 135 manufacturers:

- Contact details
- Foundation and staff
- Turnover and earnings
- Product range
- Production sites
- Types of pipes
- Profile summary
- Type, Applications, Processes, Innovations
- Plastics, Applications and Connection method

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**This study is especially useful for:**

- Producers and traders of pipes for sewage disposal, drinking water supply, cable protection, gas supply, agriculture, industry, geothermal energy, fire protection, district heating, ventilation, and domestic applications, as well as their clients
- Suppliers of pre-products, such as polyvinyl chloride, polyethylene, polypropylene, polybutylene, polyamide, ABS, and other plastics and additives, as well as their clients
- Plant and mechanical engineers
- Investors and analysts
- Authorities and organizations
- Associations and institutes
- Management
- Technology / production
- Strategy planning
- Research and development
- Market research and marketing
- Sales, purchasing, import-export



**Plasticisers**  
69 Products; 145 Producers; 273 Pages, 19 Graphs, 18 Tables; 08/05



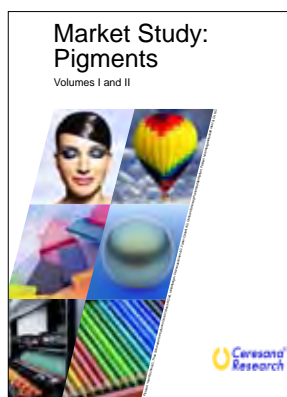
**Solvents**  
77 Products; 270 Producers; 452 Pages, 80 Graphs, 8 Tables; 01/06



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44 Products; 241 Producers; 627 Pages, 82 Graphs, 33 Tables; 07/06



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21 Products; 702 Producers; 2 Vol., 1,074 P., 88 Graphs, 28 Tables; 07/07



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300 Products; 250 Producers; 2 Vol., 1,154 P., 53 Graphs, 56 Tables; 12/07



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90 Products; 68 Producers; 505 Pages, 53 Graphs, 3 Tables; 04/08



**Polypropylene**  
64 Countries; 101 Producers; 2 Vol., 1,030 P., 313 Graphs, 118 Tables; 06/08



**Polyethylene - HDPE**  
65 Countries, 100 Producers; 2 Vol., 994 P., 285 Graphs, 99 Tables; 09/08

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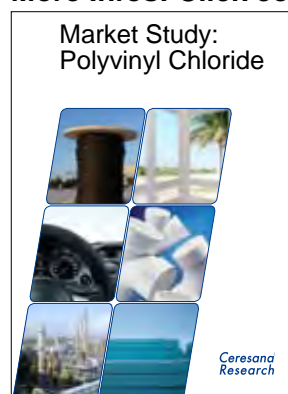
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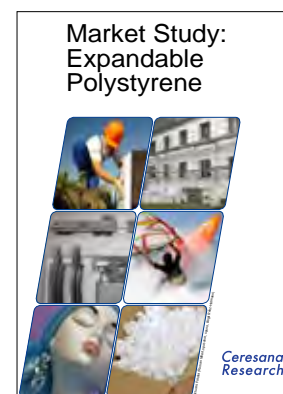
### Bioplastics

7 Countries; 12 Products, 77 Producers; 400 P., 80 Graphs, 32 Tables; 06/09



### Polyethylene - LLDPE

67 Countries, 80 Producers; 2 Vol., 830 P., 305 Graphs, 100 Tables; 03/10



### Expandable Polystyrene

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### Polyethylene - LDPE

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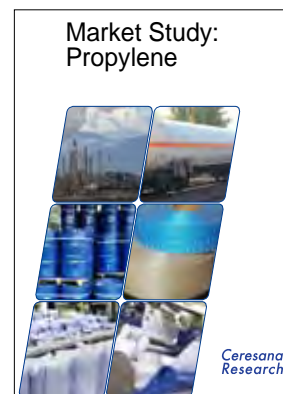
### Plastic Caps

31 Countries, 379 Producers; 2 Vol., 1,100 P., 139 Graphs, 72 Tables; 09/10



### Ethylene

55 Countries, 117 Producers; 2 Vol., 801 P., 288 Graphs, 191 Tables; 12/10



### Propylene

51 Countries, 137 Producers; 2 Vol., 760 P., 257 Graphs, 137 Tables; 01/11



### Plastic Pipes

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