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World Plastic Pipe

Industry Study with Forecasts for **2012 & 2017**

Study #2411 | December 2008 | $5700 | 358 pages

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World Plastic Pipe

Industry Study with Forecasts for ***2012 & 2017***

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WORLD OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Plastic Pipe

Industry Study with Forecasts for ***2012 & 2017***

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Gains will be based on continued strong prospects in developing nations, particularly China, which will claim 30 percent of overall length demand gains for plastic pipe through 2012.

Global demand to grow 4.6% yearly through 2012

Worldwide demand for plastic pipe is forecast to increase 4.6 percent annually through 2012 to 8.2 billion meters, or 18.2 million metric tons. Gains will be based on continued strong prospects in developing nations, particularly in China. In fact, China will account for 30 percent of overall length demand gains for plastic pipe between 2007 and 2012.

PVC to remain leading plastic pipe resin

Polyvinyl chloride (PVC) is the leading plastic pipe resin, accounting for nearly two-thirds of plastic pipe demand by weight in 2007. PVC pipe is popular because of its low cost, durability, strength and ease of extrusion, allowing it to make inroads against non-plastic pipe materials. Demand for HDPE pipe will benefit from use as small-diameter pipe in natural gas transmission, as conduit for electrical and telecommunications applications, and as corrugated pipe for drains and sewers. While comparatively small, demand for fiberglass pipe will post well above average gains, reflecting growth in extreme environment uses.

Developed countries to continue accounting for most plastic pipe demand

Despite below-average growth, developed countries will continue to account for the majority of total plastic pipe demand. These regions (Western Europe and North America, as well as certain nations in the Asia/Pacific region, such as Japan and Australia) have the highest levels of pipe use intensity. However, they are also comparatively mature markets, where growth in construction activity tends to be well below the global average, inhibiting growth rates for plastic pipe.

In the developing countries of Eastern Europe, Asia (exclusive of Japan) and the Africa/Mideast region, gains will outpace the global average, benefitting from ongoing infrastructure development. Economic growth in these countries will create demand for plastic pipe in networks for telecommunications and in residential home building applications. In addition, ongoing efforts across these regions to upgrade water treatment systems will boost demand for plastic pipe used for potable water delivery and in drainage and sewage applications.

Finally, in many nations, demand will benefit from the expansion of natural gas distribution networks. A large number of these networks are currently under construction, in response to accelerating demand for natural gas in heating, industrial fuel and electricity generation applications. In particular, growth in these applications will benefit high density polyethylene (HDPE) pipe.

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Sample Text, Table & Chart

TABLE V-3

GERMANY MACROECONOMIC INDICATORS & TOTAL PIPE DEMAND

Item	1997	2002	2007	2012	2017
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2006$)					
% of GDP					
Gross Fixed Investment (bil 2006$)					
persons per household					
Households (millions)					
meters/capita					
meters/000$ GDP					
meters/000$ GFI					
meters/household					
Total Pipe Demand (mil meters)					
Construction					
Energy					
Agriculture & Other					

SAMPLE TABLE

...TERN EUROPE

...many: Plastic Pipe Demand

Demand for plastic pipe products in Germany is projected to ...ase ... ...tric tons in 2012. In length ..., d... ...million meters. Gains will ...e la... ...on environment in Germany, ...cula... ...ctor. Gains in demand will ...pen... ...metal, clay and other pipe ...rials ...nd in Germany is used in ...ruc... ...tion and sewer and waste ... ap... ...ounted for 38 percent of ...pip...

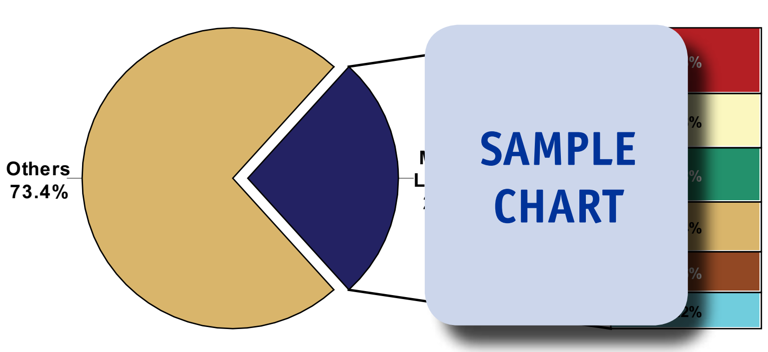
SAMPLE TEXT

...Co... ...is projected to increase ...perce... ...in 2012. Demand is concentrated in construction applications, primarily water transmission uses such as potable water, sewer and drainage pipe. Demand for PVC pipe in Germany is moderated by increasing environmental restrictions on PVC materials of all kinds. The disposal of PVC products in landfills was banned in 2005, and incineration is limited and regulated, so that PVC pipe use must be viewed with an eye toward its eventual recyclability. Over the last several decades, nearly 300 German municipalities have banned or restricted the use of PVC building products, including PVC pipe.

... metric tons in ... large diameter ...ission will spur ...ution systems

CHART VIII-1

WORLD PLASTIC PIPE MARKET SHARE BY COMPANY, 2007 ($25 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE V-4

GERMANY PLASTIC PIPE DEMAND

Item	1997	2002	2007	2012	2017
Total Pipe Demand (mil meters)	477	450	459	520	570
% plastic					
Plastic Pipe Demand (mil meters)					
kg/meter					
Plastic Pipe Demand (000 metric tons)					
PVC					
HDPE					
Other					

SAMPLE TABLE

COMPANY PROFILES

Mitsubishi Chemical Holdings Corporation
14-1 Shiba 4-chome
Minato-ku, Tokyo 108
Japan
813-6414-4870
http://www.mitsubishichem-hd.co.jp

Sales: $
Employ

Key Pro ... ne and biodegrad-
able plas

SAMPLE PROFILE

Mit ... MCHC) is a holding company ... mpanies and their subsidiaries: Mitsubishi Chemical Corporation, Mitsubishi Plastics Incorporated and Mitsubishi Tanabe Pharma Corporation. The Company operates through five segments: Petrochemicals, Performance Products, Functional Products, Health Care and Other.

The Company is active in the world plastic pipe industry through the Functional Products segment, which recorded sales of $3.5 billion in FY 2008. Among the businesses that operate through the Functional Products segment is the Mitsubishi Plastics Incorporated subsidiary (Japan), a leading Japanese producer of plastics and plastic products, including pipe. The company operates in four divisions, of which the Building Materials division manufactures rigid polyvinyl chloride (PVC), polyethylene and biodegradable plastic pipe. Through division, Mitsubishi Plastic produces and sells PVC pipe under the HISHIPIPE brand name for applications in the municipal water supply, sewage, agriculture, construction and chemical industries. Polyethylene pipe

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"Demand for pipe products in Germany is projected to increase 2.5 percent annually through 2012 to 520 million meters. This represents the reversal of a trend which has been in place for the last ten years, when demand for pipe suffered due to steadily declining levels of construction activity, particularly in the residential sector. As residential construction finally returns to a positive growth arc, demand for pipe products of all kinds will benefit. In particular, demand will increase for ..."
--Section V, pg. 88-9

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Other Studies

Plastic & Competitive Pipe

This study analyzes the US pipe industry. It presents historical demand data (1998, 2003 and 2008) and forecasts to 2013 and 2018 by pipe material (concrete, steel, plastic, cast iron, copper, aluminum, clay) and application (e.g., potable water, natural gas and oil, conduit, drain and sewer, drain, waste and vent, drainage and irrigation, process, structural and mechanical). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2472 .... 03/2009.................... $4800

Plumbing in China

Demand for plumbing products in China will grow 9.9% annually through 2012. Ongoing trends toward multiple bathrooms and larger kitchens and further penetration of bathtubs and showers in Chinese homes will help fuel gains. The residential market will remain dominant while the nonresidential market will grow the fastest. This study analyzes the 75.6 billion yuan plumbing product industry, with forecasts for 2012 and 2017 by material, product, market and region. It also details market share and profiles industry players.

#2410 .... 11/2008.................... $5100

Large Diameter Pipe in China

Demand for large diameter pipe in China will grow 9% annually through 2012, driven by continued increases in spending on physical infrastructure and new building construction. Pipe used in sanitary sewer, drainage, storm sewer and natural gas transportation applications will see the fastest growth. This study analyzes the 57.1 million meter large diameter pipe industry in China, with forecasts for 2012 and 2017 by material type, market and geographic region. It also evaluates market share and profiles industry participants.

#2400 .... 10/2008.................... $5100

Large Diameter Pipe

US large diameter pipe demand will reach $10 billion in 2012, driven by a rebound in construction and expansions and upgrades for an aging pipe infrastructure. Concrete pipe will remain dominant while plastic pipe grows the fastest. Storm sewers will continue as the leading market due to widespread drainage uses and expanded road construction. This study analyzes the US large diameter pipe industry, with forecasts for 2012 and 2017 by market and material. It also evaluates market share and profiles industry players.

#2401 .... 09/2008.................... $4600

Construction Outlook in China

Construction expenditures in China will grow 9.2% annually through 2012. Nonbuilding construction will be the fastest growing sector based on the expansion and upgrading of the country's physical infrastructure, and on utilities construction. Nonresidential building will remain the largest market. This study analyzes the ¥4.8 trillion construction sector in China, with forecasts for 2012 and 2017 by type, market and geographic region. It also evaluates company market share and profiles industry participants.

#2356 .... 07/2008.................... $5100

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