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World Plastic Pipe

Industry Study with Forecasts for **2015 & 2020**

Study #2748 | May 2011 | \$6100 | 397 pages

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Smaller-volume plastic pipe -- such as ABS, GRP and PP pipe -- will expand at an above-average pace, as end users become more familiar with their characteristics and performance.

World demand to rise 7.3% annually through 2015

World plastic pipe demand is forecast to increase 7.3 percent annually to 20.3 million metric tons in 2015. Consumption of smaller-volume plastic pipe products - such as ABS, GRP and PP pipe -- will expand at an above-average pace, as end users become more familiar with their technical characteristics and performance features. Increases in global construction activity and process manufacturing output will support growth. Sales of HDPE pipe are expected to rise over seven percent annually through 2015 because of additional investment in natural gas distribution networks and solid crude oil and natural gas output gains. Additionally, HDPE pipe (also ABS and PP pipe) will be used more frequently in construction applications, at the expense of PVC pipe.

Asia/Pacific market to offer best opportunities

More than two-thirds of all plastic pipe demand generated during the 2010-2015 period will be attributable to the Asia/Pacific region. Plastic pipe consumption in the region is predicted to increase almost nine percent annually through 2015 because of solid advances in natural gas production, process manufacturing activity, and residential and nonresidential building construction expenditures. Several major Asian countries are forecast to record rapid

World Plastic Pipe Demand, 2010 (15.8 million metric tons)



PVC
56%

HDPE
28%

Other
16%

photo: Diamond Plastics Corporation

growth, including India, China and Indonesia. China alone will account for 40 percent of global plastic pipe demand generated between 2010 and 2015.

The North American plastic pipe market is forecast to grow more than six percent annually through 2015, as product sales in the US recover rapidly. Plastic pipe consumption in the US is expected to increase nearly seven percent per year during this time, after it declined dramatically between 2007 and 2009 because of turmoil in the residential construction industry and the global financial crisis. The US construction sector will be responsible for nearly all regional plastic pipe market gains during the 2010-2015 period.

Growth in the Africa/Mideast, East European and West European plastic pipe markets will accelerate through 2015. Fixed investment expenditures, construction spending and manufacturing output will rebound in Eastern and Western Europe, as these regions recover from the global financial crisis. Advances in energy production and construction and manufacturing activity will support plastic pipe market gains in the Africa/Mideast region. In contrast, Central and South America will register slower growth than its industrializing counterparts as advances will be measured from a fairly high 2010 base.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Plastic Pipe Demand

Plastic pipe sales in China totaled 4.9 million metric making it the largest market for these products worldwide responsible for nearly two-thirds of Asia/Pacific plastic pipe year. The two dominant products in the country are PVC and Several other types of pipe are also used extensively in China including ABS, CPVC, FRP, GRP, PEX and PP pipe. For PVC pipe important end users are construction firms, process manufacturing agricultural enterprises. HDPE pipe is primarily utilized in high-end construction applications. Other types of plastic pipe are popular with a variety of consumers, ranging from energy supply companies. From 2005 to 2010, plastic pipe consumption expanded almost 19 percent per year, the world's fastest plastic construction spending, natural gas production and manufacturing gains supported growth. Additionally, plastic pipe use (particularly in construction applications) increased greatly in China during the last few years at the expense of pipe made of other materials, such as carbon steel.

Demand for plastic pipe in China is projected to rise 9.7 percent per year through 2015, faster than the average for the Asia/Pacific region. The PVC, HDPE and other pipe segments are expected to grow at similar paces through 2015. Advances in construction and the increasing consumption of PVC, HDPE, ABS, LDPE, and GRP pipe are expected to drive growth in process manufacturing production. As natural gas production gains stimulate pipeline construction in China, demand for HDPE, ABS, FRP and GRP pipe will grow. In recent years, a number of new national standards have been developed for plastic pipe that may affect product demand in the future. For example, new Chinese standards for uPVC water well filter pipe and polypropylene plastic composite pressure pipe came into force in 2009.

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TABLE VI-3

CHINA MACROECONOMIC INDICATORS & TOTAL PIPE DEMAND

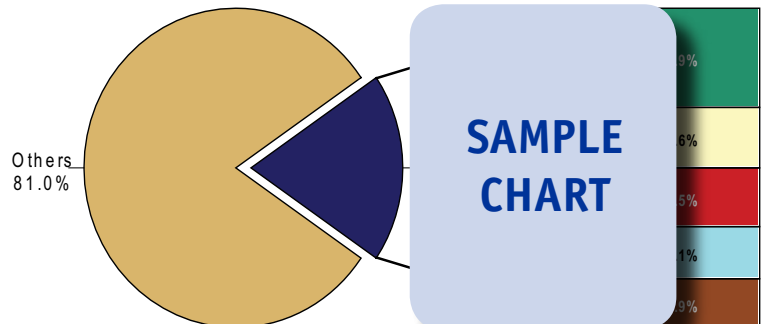
Item	2000	2005	2010	2015	2020
Population (millions)	1,200	1,250	1,350	1,400	1,500
GDP/capita	1,000	2,000	3,500	5,000	7,000
Gross Domestic Product (bil 2009\$)	10,000	20,000	45,000	70,000	100,000
% of GDP	0.5	0.5	0.5	0.5	0.5
Gross Fixed Investment (bil 2009\$)	5,000	10,000	20,000	30,000	40,000
Construction Expenditures (bil 2009\$)	2,000	4,000	8,000	12,000	15,000
meters/capita	4	6	10	12	15
meters/000\$ GDP	0.04	0.06	0.10	0.12	0.15
meters/000\$ GFI	0.02	0.04	0.08	0.10	0.12
meters construct pipe/000\$ construct	0.2	0.4	0.8	1.0	1.2
Total Pipe Demand (mil meters)	4,800	9,600	18,000	25,200	33,600
Construction	4,000	8,000	15,000	21,000	28,000
Energy	500	1,000	2,000	3,000	4,000
Agriculture, Industry & Other	300	600	1,000	1,200	1,600

SAMPLE TABLE

SAMPLE TEXT

CHART VIII-1

WORLD PLASTIC PIPE MARKET SHARE BY COMPANY (\$28.1 billion, 2010)

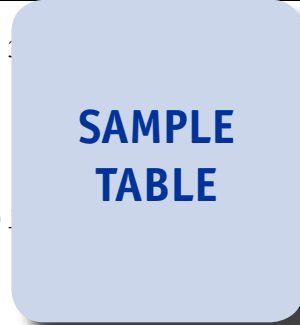


SAMPLE CHART

Sample Profile, Table & Forecast

**TABLE VI-4
CHINA PLASTIC PIPE DEMAND**

Item	2000	2005	2010	2015	2020
Total Pipe Demand (mil meters)					
% plastic					
Plastic Pipe Demand (mil meters)					
kg/meter					
Plastic Pipe Demand (000 metric tons)					
PVC					
HDPE					
Other					



COMPANY PROFILES

egeplast Werner Strumann GmbH & Company KG

Robert-Bosch-Straße 7
 48268 Greven
 Germany
 49-2575
 http://ww

Sales: \$
 Employ

Key Pro



egeplast is a leading manufacturer of polyethylene and polypropylene pipe for drinking water, wastewater, gas and telecommunications applications. The Company is owned by Strumann Beteiligungs-Gesellschaft mbH (Germany).

The Company's pipe products are typically used in open-trench and trenchless installations for underground end uses. Pipes from egeplast Werner Strumann are intended to resist point loads, scratches and scores, diffusions, leaks and other damage. Among these products are EGEPLAST HEXELONE, EGEPLAST EGELLEN, EGEPLAST 9010 RC PLUS, EGEPLAST SLM RC PLUS, EGEPLAST SLM DCT, EGEPLAST SLA barrier and EGEPLAST 3L leak control pipe. The Company also produces EGE-COM MICRODUCT cable protection polyethylene pipe.

Manufacturing and sales activities are conducted by egeplast Werner Strumann at a facility in Greven, Germany. The facility produces more than 45,000 metric tons of pipe on 14 extrusion lines per year. The Company operates in Europe through such sales subsidiaries as egeplast Ireland Limited, egeplast Italia srl, egeplast France Sarl,

"The energy pipe segment is expected to register the fastest growth through 2015, as natural gas consumption and production expand. Several important energy pipeline projects have been announced for this period. The Anning-Kunming-Quijing Pipeline, Anning-Chuxiong-Dali-Baoshan Pipeline and Anning-Yuxi-Mengzi-Wenshan Pipeline projects are expected to commence in 2011. These pipelines will be connected to a refinery in Anning City, which is due to be completed in 2014."
 --Section VI, pg. 153

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OTHER STUDIES

Construction Outlook in China

This study analyzes the construction industry in China. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by type (residential building, nonresidential building, nonbuilding), market (new construction, additions and alterations, maintenance and repairs) and Chinese region (e.g., Central-North, Northeast, Central-East). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2767 June 2011 \$5400

Large Diameter Pipe

US demand for large diameter pipe will rise 6.2 percent per year through 2015. The storm and sanitary sewer market will remain the leading outlet, while water transmission and drainage pipe will be the fastest growing market. Ductile iron, concrete and HDPE pipe will be the fastest growing material types. This study analyzes the \$6.1 billion US large diameter pipe industry, with forecasts for 2015 and 2020 by market and material. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2745 April 2011 \$4900

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

#2746 March 2011 \$4800

Plastic & Competitive Pipe

US demand for pipe is forecast to advance 6.6 percent annually through 2015. Gains will be driven in part by a rebound in construction activity and an improved outlook for state and municipal infrastructure spending. PVC and other plastic pipe will be the fastest-growing pipe material, while steel pipe will remain the leading material. This study analyzes the \$28.1 billion US pipe industry, with forecasts for 2015 and 2020 by market, material and plastic resin. It also evaluates company market share and profiles industry participants.

#2738 February 2011 \$5100

Water & Wastewater Pipe

Demand for water and wastewater pipe in the US is expected to rise 5.8 percent annually through 2014. Copper pipe will be the fastest growing product while plastic pipe remains dominant. Building construction will be the fastest growing market, with potable water applications leading gains. This study analyzes the \$14.8 billion US water and wastewater pipe industry, with forecasts for 2014 and 2019 by market, application and product. It also evaluates company market share and profiles industry players.

#2634 June 2010 \$4700

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