World Plastic Pipe

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

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

The Freedonia Group

767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

www.freedoniagroup.com

World Plastic Pipe

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

Freedonia

Table of Contents

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Plastic Pipe

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

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.

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

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 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.

World Plastic Pipe

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

Freedonia®

Sample Text, Table & Chart

TABLE VI-3

CHINA
MACROECONOMIC INDICATORS & TOTAL PIPE DEMAND

Item	2000	2005	2010	2015	2020
Population (millions)	1				06
GDP/capita					0
Gross Domestic Product (bil 2009$)					0
% of GDP					0
Gross Fixed Investment (bil 2009$)					5
Construction Expenditures (bil 2009$)					5
meters/capita					4
meters/000$ GDP					6
meters/000$ GFI					2
meters construct pipe/000$ construct					2
Total Pipe Demand (mil meters)					0
Construction					0
Energy					0
Agriculture, Industry & Other	12				50

SAMPLE TABLE

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 pi
year. The two domiant products in the country are PVC a
Several other types of pipe are also used extensively in Ch
ing ABS, CPVC, FRP, GRP, PEX and PP pipe. For PVC p
important end users are construction firms, process manuf
agricultural enterprises. HDPE pipe is primarily utilized i
high-end construction applications. Other types of plastic
lar with a variety of consumers, ranging from energy supp
cal companies. From 2005 to 2010, plastic pipe consumpt
expanded almost 19 percent per year, the world's fastest p
construction spending, natural gas production and manufa
gains supported growth. Additionally, plastic pipe use (pa
construction applications) increased greatly in China durin
at the expense of pipe made of other materials, such as co
steel.

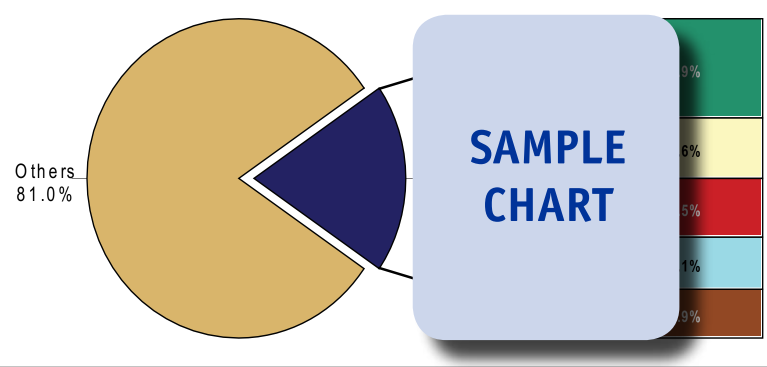
Demand for plastic pipe in China is projected to rise 9.7 percent per
metric tons in 2015, faster than the average
gion. The PVC, HDPE and other pipe seg-
ar paces through 2015. Advances in construc-
consumption of PVC, HDPE, ABS, LDPE,
of PVC, FRP and GRP pipe are expected to
process manufacturing production. As natu-
production gains stimulate pipeline
in China, demand for HDPE, ABS, FRP and GRP pipe will g
recent years, a number of new national standards have been
plastic pipe that may affect product demand in the future. Fo
new Chinese standards for uPVC water well filter pipe and p
plastic composite pressure pipe came into force in 2009.

SAMPLE TEXT

154

CHART VIII-1

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



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					

SAMPLE TABLE

COMPANY PROFILES

egeplast Werner Strumann GmbH & Company KG
Robert-Bosch-Straße 7
48268 Greven
Germany
49-2575
http://ww

Sales: $ ... y)
Employ

Key Pro ... pe

SAMPLE PROFILE

egep... 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 EGELEN, 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,

323

"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

Order Information

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

Order Form

F-WEB.2748

World Plastic Pipe $6100

☐ Corporate Use License (add to study price) * +$2600

___ Additional Print Copies @ $600 each *

Total (including selected option) $___________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # ____________________ Expiration Date MM __ YY __

Signature ____________________

Name ____________________

Title ____________________

Company ____________________

Division ____________________

Street ____________________ (No PO Box please)

City/State/Zip ____________________

Country ____________________

Phone ____________________ Fax ____________________

Email ____________________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ____________________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

Signature ____________________

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com

Freedonia®

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

• Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research

Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com