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World Water Pipe

Industry Study with Forecasts for **2007 & 2012**

Study #3004 | April 2013 | \$6100 | 414 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

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In developing nations demand will rise as access to water supply and sanitation increases; in developed nations demand will benefit from a rebound in construction spending.

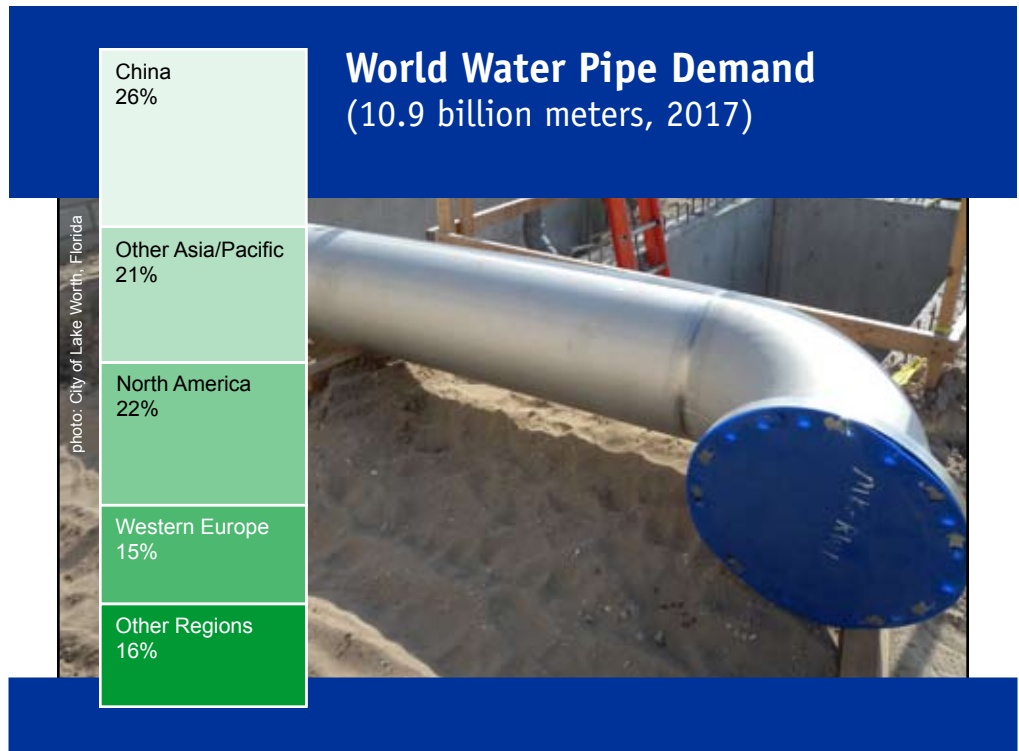
Demand to grow 7.5% annually through 2017

Global demand for water pipe is forecast to increase 7.5 percent per year through 2017 to 10.9 billion meters, a significant acceleration from the pace of the 2007-2012 period. Advances will result from two key factors: access to water supply and sanitation will be increased in developing nations, while in developed nations a rebound in construction spending will boost demand for building pipe. Plastic pipe will post the best gains as it continues to displace concrete and metal in a range of markets, particularly water distribution.

China to account for one-third of global advances

China alone is forecast to account for one-third of the increase in global water pipe demand generated between 2012 and 2017. A significant percentage of China's vast population does not have access to a piped water supply, but such infrastructure development will remain a priority during the forecast period, stimulating demand. Other industrializing countries in Asia -- such as India and Indonesia -- and in the Africa/Mideast region will also make important contributions to overall water pipe demand.

Buildings will remain the leading market for water pipe through 2017, largely due to a recovery in building construction, particularly in the key US market. Gains in transmission and service applications will be prompted by expansion of water supply services, to which access in many developing countries remains low.



The sewer and drainage market will also post strong gains as developing nations boost efforts to improve sanitation systems. Both of these trends will prompt solid long term growth prospects for water pipe, as even a robust level of growth in developing markets will leave several hundred million people without access to safe water or even minimal sanitation facilities.

Plastic to offer best growth of any water pipe material

Plastic pipe will offer the best growth of any product type through 2017. Polyvinyl chloride (PVC) will remain the leading plastic resin based on its use in small diameter applications in the potable water distribution and irrigation markets.

High density polyethylene (HDPE) pipe, which has historically been used largely in the oil and gas market, will continue to make gains in the water pipe market. PEX, a type of HDPE, can replace PVC and metal in pipes in distribution applications. HDPE pipe will also supplant concrete, PVC, and steel pipe in drainage and storm sewer applications.

Steel pipe, which is commonly used in drainage applications, will benefit from advances in nonbuilding construction. Copper pipe will benefit from an acceleration in construction spending, since it is widely utilized in water distribution. Increased infrastructure spending, which will spur replacement of old and construction of new transmission and sewer lines, will fuel gains for ductile iron and concrete pipe.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Water Pipe Demand by Market

Demand for water pipe in China is forecast to rise nearly annually through 2017, a deceleration from the robust growth in 2012. Although the Chinese economy is expected to grow at a slower rate over the last decade, there will still be numerous construction projects in the pipeline. For instance, construction spending in China is expected to rise at the fastest rate in the Asia/Pacific region. China is the single largest user of water pipe, with over half of all Asia/Pacific demand.

**SAMPLE
TEXT**

Buildings will remain the largest market for water pipe with solid growth through 2017. Continued urbanization in China will cause all segments of the buildings market to record strong growth. For example, demand for water pipe used in applications such as residential and drain, waste, and vent will benefit from growth in the housing units.

The sewer and drainage market will benefit from increased construction spending, as housing units in newly developed areas require new sanitation lines. Rising demand for water pipe in the transmission and service market reflects the ongoing industrialization of the country. The construction of large industrial facilities in the nation is dependent on reliable access to a water supply. Moreover, as these factories and businesses have hired workers, standards of living have increased, leading to greater need for potable water and residential sanitation.

Many municipal water systems have pipelines that date back to before 1950. These lines have been inadequately maintained and are prone to break, resulting in high leakage rates. In recent years the government has demonstrated a greater commitment to providing safe water, to improving the quality of water produced by

168

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TABLE VI-7

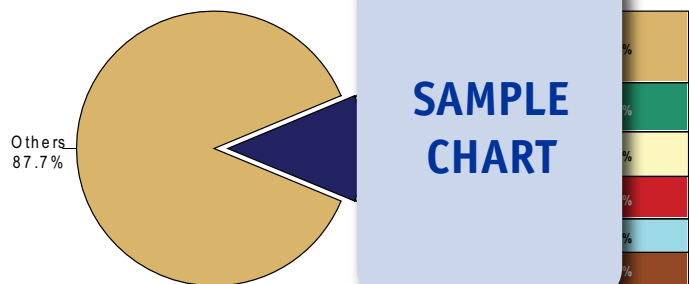
CHINA: MARKET ENVIRONMENT FOR WATER PIPE

Item	2002	2007	2012	2017	2022
Resident Population (mil)					92
GDP/capita					10
Gross Domestic Product (bil 2011\$)					10
Water Use (cubic km)					0
Gross Fixed Capital Formation (bil 2011\$)					10
Construction Expenditures (bil 2011\$)					0
Housing Stock (mil units)					0
New Housing Units (000 units)					60
Water Pipe Demand (mil meters)					2
% water					4
% fixed capital					7
% construction					7
Water Pipe Demand (mil meters)					10
% water					7
Total Pipe Demand (mil meters)					59

**SAMPLE
TABLE**

CHART VIII-1

WATER PIPE PRODUCT MARKET SHARE (\$65 billion, 2012)

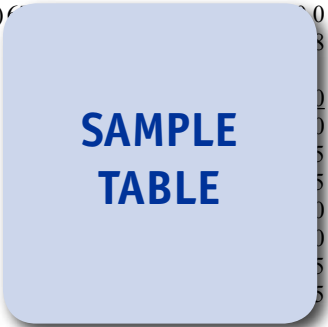


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-8
CHINA: WATER PIPE DEMAND BY MARKET
 (million meters)

Item	2002	2007	2012	2017	2022
Construction Expenditures (bil 2011\$) / meters/000\$ construction					
Water Pipe Demand					
Building:					
Distribution					
Drain, Waste, & Vent					
Heating					
Transmission & Service					
Sewer & Drainage					
Irrigation & Other					



COMPANY PROFILES

KEM ONE SAS
 210 avenue Jean Jaurès
 69007 Lyon
 France
 334-6967
 http://www

Sales: \$
 Employe
 Key Proc

SAMPLE PROFILE

KEM ONE SAS is a result of the acquisition of the former Vinyl Products segment of Arkema SA (France) by Klesch Group (Switzerland). The Company manufactures a range of vinyl products, including chlorine, caustic soda, polyvinyl chloride, vinyl compounds, and plastic pipes and profiles. In March 2013, KEM ONE filed for a state of insolvency and was put into receivership.

The Company is involved in the world water pipe industry through the Alphacan Company subsidiary (France), which manufactures pipes and profiles from polyvinyl chloride (PVC), polypropylene, and other materials. Pipe products from Alphacan include BIPEAU and PRIMUS PVC types, and OMNIPLAST polypropylene varieties. BIPEAU PVC pipe is available in diameters up to 710 millimeters (mm) for use in soil drainage, sewer, and wastewater systems. The company's PRIMUS PVC sewer pipe features high ring stiffness and resistance to chemicals. OMNIPLAST polypropylene pipe is designed to resist chemicals and abrasions in drainage and wastewater applications.

Alphacan manufactures pipe products at sites in Germany and the Netherlands. In Germany, the Alphacan Omniplast GmbH subsidiary

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“Demand for water pipe in China reached 1.7 billion meters in 2012, largest of any nation. China has been the fastest growing market for water pipe in recent years, with average annual sales increases of nearly 20 percent between 2002 and 2012. Advances have been stimulated by the nation’s rapid industrialization, resulting in a significant improvement in living standards, as well as large increases in construction activity.”
 --Section VI, pg. 171

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OTHER STUDIES

World Water Treatment Equipment

World demand for water treatment equipment is expected to grow 6.9 percent per year to \$53.4 billion in 2017. Developing areas will show strong growth based on improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems. This study analyzes the \$38.3 billion world water treatment equipment industry, with forecasts for 2017 and 2022 by product, market, world region and major country. The study also evaluates company market share and profiles industry players.

#3103December 2013 \$6100

Water Treatment Equipment

Demand for water treatment equipment in the US is forecast to grow 5.9 percent per year to \$13.0 billion in 2017. The resource extraction market will post the most rapid gains, followed by the recovering commercial and residential markets. Disinfection and membrane equipment will be the fastest growing product segments. This study analyzes the \$9.8 billion US market for water treatment equipment, with forecasts for 2017 and 2022 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3052 July 2013 \$5100

World Plastic Pipe

Global demand for plastic pipe is projected to rise 8.5 percent annually through 2017 to 11.2 billion meters. Construction related applications will drive growth in all global regions, with North America and the Asia/Pacific regions leading gains. HDPE pipe will take market share from dominant PVC pipe in a variety of construction uses. This study analyzes the 7.5 billion meter world plastic pipe industry, with forecasts for 2017 and 2022 by market, resin, world region, and for 24 major countries. The study also evaluates company market share and profiles industry competitors.

#3015April 2013 \$6300

World Water Disinfection Products

World demand for water disinfection products will rise 5.5 percent annually to \$7.7 billion in 2016. China and the Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. A shift in the product mix from elemental chlorine towards higher value chemicals and advanced technologies will continue. This study analyzes the \$5.9 billion world water disinfection product industry, with forecasts for 2016 and 2021 by product, market, world region and for 16 countries. The study also evaluates company market share and profiles industry participants.

#2992 March 2013 \$6100

World Pumps

Global pump demand will rise 6.4 percent yearly through 2016 to \$76.1 billion. Gains in developing areas such as China and India will result from investment in water infrastructure and electricity generation. In developed areas, growth will be driven by process manufacturing. Positive displacement and centrifugal pumps will lead gains. This study analyzes the \$55.8 billion world pump industry, with forecasts for 2016 and 2021 by product, market, world region and for 36 major countries. The study also evaluates company market share and profiles industry participants.

#2971January 2013 \$6400

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