World Plastic Pipe

Industry Study with Forecasts for 2017 & 2022

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT
General ............................................ 4
World Economic Overview .................. 5
Recent Historical Trends .................... 5
Macroeconomic Outlook .................... 7
World Demographic Overview ............ 11
Population .................................. 11
Urbanization Patterns ..................... 13
Households .................................. 14
World Fixed Investment Outlook ........ 16
World Construction Outlook ............. 18
World Energy Overview ................. 20
Energy Supply ................................ 21
Energy Consumption ..................... 23
World Water Utilization Trends ........ 25
Nonagricultural Water Use ............... 25
Agricultural Water Use .................... 27
Competitive Materials .................... 29
Aluminum .................................. 29
Concrete ................................... 30
Copper .................................... 31
Ductile/Cast Iron ....................... 31
Steel ....................................... 31
Vitrified Clay .............................. 32
Environmental & Regulatory Considerations 32
Building Codes .......................... 33
Environmental, Health, & Performance Considerations 34
Pipe Recycling ............................ 36

OVERVIEW
General ........................................ 38
Plastic Pipe Demand by Region .......... 40
Demand by Weight ......................... 41
Demand by Length ......................... 44
Plastic Construction Pipe
Demand by Region ....................... 46
Other Plastic Pipe Demand by Region ... 48
Plastic Pipe Production by Region ...... 49
World Plastic Pipe Trade Flows ......... 51
Plastic Pipe Demand by Resin .......... 52

NORTH AMERICA
General ........................................ 57
Plastic Pipe Markets ..................... 59
Plastic Pipe Products & Producers ...... 61
United States .................................. 64
Canada ....................................... 70
Mexico ...................................... 76

WESTERN EUROPE
General ...................................... 83
Plastic Pipe Markets .................... 85
Plastic Pipe Products & Producers ...... 87
France ...................................... 90
Germany ................................... 96
Italy ......................................... 103
Netherlands ................................ 109
Spain ........................................ 115
United Kingdom ......................... 121
Other Western Europe .................. 127

ASIA/PACIFIC
General ..................................... 139
Plastic Pipe Markets .................... 141
Plastic Pipe Products & Producers ...... 143
Australia .................................. 146
China ....................................... 152
India ........................................ 159
Indonesia .................................. 166
Japan ....................................... 172
South Korea .............................. 178
Taiwan ...................................... 184
Thailand .................................... 190
Other Asia/Pacific ...................... 196

OTHER REGIONS
Central & South America ............... 206
Plastic Pipe Markets .................... 208
Plastic Pipe Products & Producers ...... 210
Argentina .................................. 213
Brazil ....................................... 219
Other Central & South America ....... 225
Eastern Europe .......................... 233
Plastic Pipe Markets .................... 235
Plastic Pipe Products & Producers ...... 237
Poland ..................................... 240
Russia ...................................... 246
Other Eastern Europe .................. 253
Africa/Mideast ........................... 263
Plastic Pipe Markets .................... 266
Plastic Pipe Products & Producers ...... 267
Iran ......................................... 270
Saudi Arabia .............................. 276
Turkey ...................................... 282
Other Africa/Mideast ................... 288

INDUSTRY STRUCTURE
General ...................................... 297
Industry Composition .................... 298
Market Share ................................ 301
Manufacturing & Product Development .... 304
Marketing & Distribution ............... 305
Acquisitions & Divestitures ............ 307
Cooperative Agreements ................ 312

COMPANY PROFILES
Advanced Drainage Systems ............ 317
Aliaxis SA .................................. 321
Arkema SA .................................. 328
Axiall Corporation ......................... 329
Chevron Phillips Chemical ................ 331
China Liansu Group ...................... 333
Dura-Line Holdings ....................... 335
egeplast Werner Strumann .............. 337
Finolex Industries ......................... 339
Fischer (Georg) Limited ................... 340
Formosa Plastics ......................... 346
Future Pipe Industries ................... 348
Ginde Plastic Pipe ......................... 350
HOBAS Engineering ....................... 351
J-M Manufacturing ......................... 354
Kabelwerke Brugg ......................... 356
KEM ONE SAS ................................ 358
Kubota Corporation ....................... 359
KWH Group .................................. 361
Mexichem SAB ............................. 365
Mitsubishi Chemical ....................... 371
Mitsubishi Corporation .................... 373
National Oilwell Varco .................... 375
National Pipe & Plastics ................. 379
REHAU AG & Company ................... 381
Saint-Gobain ................................ 384
Saudi Arabian Amiantit ................. 387
Sekisui Chemical ......................... 391
Solvay SA .................................. 394
Tessenderlo Group ......................... 395
Tigre SA Tubos e Conexoes ............... 397
Toagosei Company ......................... 399
Uponor Corporation ....................... 400
Uralita SA .................................. 402
Vinindex Pty ................................ 403
Westlake Chemical ......................... 405
Wienerberger Baustoffindustrie ........ 407
Other Companies Mentioned in the Study .... 410

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List of Tables

EXECUTIVE SUMMARY
1 Summary Table ..................................3

MARKET ENVIRONMENT
1 World Gross Domestic Product by Region ....................10
2 World Population by Region ............................12
3 World Urban Population by Region ..........................14
4 World Households by Region ..............................16
5 World Fixed Investment by Region .........................18
6 World Construction Expenditures by Region ...............20
7 World Energy Production by Type .........................23
8 World Energy Consumption by Region ........................25
9 World Nonagricultural Water Use by Region ............27
10 World Land Under Irrigation .............................29

OVERVIEW
1 World Pipe Demand ..................................39
2 World Plastic Pipe Volume
   Demand by Region ..................................43
3 World Plastic Pipe Length
   Demand by Region ..................................45
4 World Plastic Construction Pipe
   Demand by Region ..................................48
5 World Other Plastic Pipe
   Demand by Region ..................................49
6 World Plastic Pipe Shipments by Region ..................50
7 World Plastic Pipe Net Exports ............................52
8 World Plastic Pipe Demand by Resin .....................55

NORTH AMERICA
1 North America: Macroeconomic Indicators & Total Pipe Demand ...59
2 North America: Plastic Pipe
   Demand by Market ..................................61
3 North America: Plastic Pipe
   Demand by Resin ..................................63
4 United States: Macroeconomic Indicators & Total Pipe Demand ...66
5 United States: Plastic Pipe
   Demand by Market ..................................68
6 United States: Plastic Pipe
   Demand by Resin ..................................70
7 Canada: Macroeconomic Indicators & Total Pipe Demand ........72
8 Canada: Plastic Pipe
   Demand by Market ..................................74
9 Canada: Plastic Pipe
   Demand by Resin ..................................76
10 Mexico: Macroeconomic Indicators & Total Pipe Demand .......78
11 Mexico: Plastic Pipe
   Demand by Market ..................................80
12 Mexico: Plastic Pipe
   Demand by Resin ..................................82

WESTERN EUROPE
1 Western Europe: Macroeconomic Indicators & Total Pipe Demand ...85
2 Western Europe: Plastic Pipe
   Demand by Market ..................................87
3 Western Europe: Plastic Pipe
   Demand by Resin ..................................89
4 France: Macroeconomic Indicators & Total Pipe Demand ........92
5 France: Plastic Pipe
   Demand by Market ..................................94
6 France: Plastic Pipe
   Demand by Resin ..................................96
7 Germany: Macroeconomic Indicators & Total Pipe Demand .......98
8 Germany: Plastic Pipe
   Demand by Market ..................................100
9 Germany: Plastic Pipe
   Demand by Resin ..................................102
10 Italy: Macroeconomic Indicators & Total Pipe Demand ..........105
11 Italy: Plastic Pipe
   Demand by Market ..................................107
12 Italy: Plastic Pipe Demand by Resin 109
13 Netherlands: Macroeconomic Indicators & Total Pipe Demand ...111
14 Netherlands: Plastic Pipe
   Demand by Market ..................................113
15 Netherlands: Plastic Pipe
   Demand by Resin ..................................115
16 Spain: Macroeconomic Indicators & Total Pipe Demand ..........117
17 Spain: Plastic Pipe
   Demand by Market ..................................119
18 Spain: Plastic Pipe
   Demand by Resin ..................................121
19 United Kingdom: Macroeconomic Indicators & Total Pipe Demand ...123
20 United Kingdom: Plastic Pipe
   Demand by Market ..................................125
21 United Kingdom: Plastic Pipe
   Demand by Resin ..................................127
22 Other Western Europe: Macroeconomic Indicators & Total Pipe Demand ...129
23 Other Western Europe: Plastic Pipe
   Demand by Market & Resin ..........................131
24 Other Western Europe: Plastic Pipe
   Demand by Country ..................................133

ASIA/PACIFIC
1 Asia/Pacific: Macroeconomic Indicators & Total Pipe Demand ...141
2 Asia/Pacific: Plastic Pipe
   Demand by Market ..................................143
3 Asia/Pacific: Plastic Pipe
   Demand by Resin ..................................145
4 Australia: Macroeconomic Indicators & Total Pipe Demand ......148
5 Australia: Plastic Pipe
   Demand by Market ..................................150
6 Australia: Plastic Pipe
   Demand by Resin ..................................152
7 China: Macroeconomic Indicators & Total Pipe Demand ..........155
8 China: Plastic Pipe
   Demand by Market ..................................157
9 China: Plastic Pipe
   Demand by Resin ..................................159
10 India: Macroeconomic Indicators & Total Pipe Demand ..........162
11 India: Plastic Pipe
   Demand by Market ..................................164
12 India: Plastic Pipe
   Demand by Resin ..................................166
13 Indonesia: Macroeconomic Indicators & Total Pipe Demand ......168
14 Indonesia: Plastic Pipe
   Demand by Market ..................................170
15 Indonesia: Plastic Pipe
   Demand by Resin ..................................172
16 Japan: Macroeconomic Indicators & Total Pipe Demand ..........174
17 Japan: Plastic Pipe
   Demand by Market ..................................176
18 Japan: Plastic Pipe
   Demand by Resin ..................................178
19 South Korea: Macroeconomic Indicators & Total Pipe Demand ...180

(continued on following page)
List of Tables

(continued from previous page)

20 South Korea: Plastic Pipe Demand by Market .......... 182
21 South Korea: Plastic Pipe Demand by Resin .......... 184
22 Taiwan: Macroeconomic Indicators & Total Pipe Demand .......... 186
23 Taiwan: Plastic Pipe Demand by Market .......... 188
24 Taiwan: Plastic Pipe Demand by Resin .......... 190
25 Thailand: Macroeconomic Indicators & Total Pipe Demand .......... 192
26 Thailand: Plastic Pipe Demand by Market .......... 194
27 Thailand: Plastic Pipe Demand by Resin .......... 196
28 Other Asia/Pacific: Macroeconomic Indicators & Total Pipe Demand .......... 198
29 Other Asia/Pacific: Plastic Pipe Demand by Market & Resin .......... 200
30 Other Asia/Pacific: Plastic Pipe Demand by Country .......... 201
31 Other Central & South America: Plastic Pipe Demand by Market & Resin .......... 209
32 Other Central & South America: Plastic Pipe Demand by Country .......... 210
33 Eastern Europe: Macroeconomic Indicators & Total Pipe Demand .......... 235
34 Eastern Europe: Plastic Pipe Demand by Market .......... 237
35 Eastern Europe: Plastic Pipe Demand by Resin .......... 239
36 Eastern Europe: Plastic Pipe Demand by Market & Resin .......... 242
37 Poland: Macroeconomic Indicators & Total Pipe Demand .......... 244
38 Poland: Plastic Pipe Demand by Market .......... 246
39 Poland: Plastic Pipe Demand by Resin .......... 249
40 Poland: Plastic Pipe Demand by Market & Resin .......... 251
41 Russia: Macroeconomic Indicators & Total Pipe Demand .......... 253
42 Russia: Plastic Pipe Demand by Market .......... 255
43 Russia: Plastic Pipe Demand by Resin .......... 257
44 Russia: Plastic Pipe Demand by Market & Resin .......... 259
45 Other Africa/Mideast: Macroeconomic Indicators & Total Pipe Demand .......... 261
46 Other Africa/Mideast: Plastic Pipe Demand by Country .......... 263
47 Other Africa/Mideast: Plastic Pipe Demand by Market .......... 265
48 Other Africa/Mideast: Plastic Pipe Demand by Resin .......... 267
49 Other Africa/Mideast: Plastic Pipe Demand by Market & Resin .......... 269
50 Iran: Macroeconomic Indicators & Total Pipe Demand .......... 272
51 Iran: Plastic Pipe Demand by Market .......... 274
52 Iran: Plastic Pipe Demand by Resin .......... 276
53 Iran: Plastic Pipe Demand by Market & Resin .......... 278
54 Saudi Arabia: Macroeconomic Indicators & Total Pipe Demand .......... 280
55 Saudi Arabia: Plastic Pipe Demand by Market .......... 282
56 Saudi Arabia: Plastic Pipe Demand by Resin .......... 284
57 Saudi Arabia: Plastic Pipe Demand by Market & Resin .......... 286
58 Turkey: Macroeconomic Indicators & Total Pipe Demand .......... 288
59 Turkey: Plastic Pipe Demand by Market .......... 290
60 Turkey: Plastic Pipe Demand by Resin .......... 292
61 Turkey: Plastic Pipe Demand by Market & Resin .......... 294
62 Other Africa/Mideast: Macroeconomic Indicators & Total Pipe Demand .......... 296

List of Charts

OVERVIEW

1 World Pipe Demand by Region, 2012 .......... 40
2 World Plastic Pipe Volume Demand by Region, 2012 .......... 44
3 World Plastic Pipe Length Demand by Region, 2012 .......... 46
4 World Plastic Pipe Demand by Resin, 2012 .......... 56

NORTH AMERICA

1 North America: Plastic Pipe Demand by Resin, 2012 .......... 64

WESTERN EUROPE

1 Western Europe: Plastic Pipe Demand by Resin, 2012 .......... 90

ASIA/PACIFIC

1 Asia/Pacific: Plastic Pipe Demand by Resin, 2012 .......... 146

OTHER REGIONS

1 Central & South America: Plastic Pipe Demand by Resin, 2012 .......... 213
2 Eastern Europe: Plastic Pipe Demand by Resin, 2012 .......... 240
3 Africa/Mideast: Plastic Pipe Demand by Resin, 2012 .......... 270

INDUSTRY STRUCTURE

1 World Plastic Pipe Market Share, 2012 .......... 301
Advances will come mainly from increased construction spending worldwide, and from the ongoing trend of plastic pipe replacing other materials, such as copper, concrete, and steel.

World demand to rise 8.5% annually through 2017

Global demand for plastic pipe is projected to rise 8.5 percent annually through 2017 to 11.2 billion meters, improving significantly from growth posted between 2007 and 2012. Advances will come in large part from increased construction spending in all global regions, given that plastic pipe is most heavily utilized in construction applications. In addition, a rebound in the key US market will spur growth. Plastic pipe will also gain market share as it continues to replace other materials, such as copper, concrete, and steel, due to its low cost, installation ease, and performance advantages.

Construction to be fastest growing market

Construction related applications will provide the most impetus for growth in plastic pipe demand in all global regions. For example, recovery in the US construction industry will result in double-digit gains in pipe demand. The US is home to the world's second largest construction market and recovery from its recent housing crisis will provide strong opportunities for plastic pipe. China, which maintains the world's largest construction market, will also contribute greatly to growth. As China's population continues to urbanize, the need for plastic pipe utilized in residential, nonresidential, and nonbuilding construction will increase.

While plastic pipe use is not as widespread in the oil and gas and process manufacturing markets, improvements in resin formulations have enabled plastic to increase its market share in recent years. For instance, HDPE and fiberglass are being more widely used in the oil and gas industry. In process manufacturing applications, HDPE's greater flexibility has resulted in its increased use. In addition, fiberglass finds use in process manufacturing applications when particularly hazardous materials are present. Going forward, demand for HDPE and fiberglass is expected to benefit from gains in manufacturing output and growth in crude oil and natural gas production and consumption -- including increases in exploratory drilling, well drilling, and pipeline construction activity.

HDPE pipe to take market share from dominant PVC

PVC is by far the most widely used pipe resin, accounting for over 55 percent of global plastic pipe demand in 2012. Going forward, however, HDPE is expected to take market share from PVC in a variety of construction applications. For instance, as PEX becomes more common in many regional markets, the material will supplant PVC potable water distribution pipe. Additionally, fiberglass is beginning to be utilized in a wider array of water and wastewater settings because of its performance advantages.
ASIA/PACIFIC

India: Plastic Pipe Markets

In length terms, plastic pipe demand in India is expected to increase by over 11 percent per year through 2017 to 625 million meters, a slight increase over 2007-2012 growth. Advances in domestic construction spending and population growth related to urbanization will spur plastic pipe demand. India has the second largest housing stock in the world and urbanization will become greater. In addition, India is also home to a large agriculture sector and manufacturing and oil and gas industries, all of which will contribute to plastic pipe demand.

Demand for plastic construction pipe in India will rise nearly 12 percent per annum to 418 million meters in 2017, advancing at a faster rate than during the 2007-2012 period. Each segment of the plastic construction market will post double-digit annual gains through the forecast period, driven by the robust growth in construction spending. Advances in residential plastic pipe demand will be driven by the rapid growth in new housing units. Nonresidential plastic pipe demand will benefit from increased construction of industrial, office, and retail establishments. Sewer and drainage applications will account for the bulk of plastic pipe growth in the nonbuilding sector.

Demand for plastic pipe utilized in other markets is projected to grow 9.9 percent annually through 2017 to 207 million meters, above 2007-2012 market gains. In India, plastic pipe is heavily used in agriculture sector and the oil and gas and process manufacturing industries. Increased oil and gas production levels will spur demand, since plastic pipe is used in both gathering and transmission applications. India, which is the region’s third largest producer of food and chemical products and the second largest manufacturer of chemicals, will contribute to plastic pipe demand.

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National Pipe & Plastics Incorporated
3421 Old Vestal Road
Vestal, NY 13850
607-729-9381
http://www.nationalpipe.com

Annual Sales: $140 million (estimated)
Employment: over 300 (estimated)

Key Products: National Pipe & Plastics is a manufacturer of polyvinyl chloride (PVC) and high density polyethylene (HDPE) pipe for the water and sewer, plumbing, electrical, industrial, and telecommunications markets. The Company is privately held.

The Company competes in the world plastic pipe industry through the manufacture of PVC pipe for water and sewer, plumbing, electrical, industrial, and telecommunications applications. National Pipe & Plastics’ main products for the water and sewer market encompass DURA-BLUE, SDR, and EVER-GREEN PVC pipes. These products are marketed as replacements for deteriorating metal pipe. Among these products, DURA-BLUE pipe products are PVC municipal water distribution pipes that can be made in purple and green colors for reclaimed water and sanitary sewer applications, respectively. SDR products are PVC pressure water pipes for potable water end uses, while EVER-GREEN products are PVC gravity sewer pipes.

For plumbing end uses, the Company makes PLUMB-RITE Schedule 40 and Schedule 80 pressure pipes. These pipes can also be used for drain, waste and vent applications. National Pipe & Plastics’

TABLE VI-11
INDIA: PLASTIC PIPE DEMAND BY MARKET
(million meters)

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“Sample Profile, Table & Forecast

In terms of weight, demand for plastic pipe in India is forecast to increase at an 8.4 percent yearly rate to 1.2 million metric tons in 2017. A number of factors will contribute to PVC and HDPE pipe growth. These include construction spending, manufacturing output, and oil and gas production and consumption. Other plastic resins, which include ABS, fiberglass, and PP, will continue to be used primarily in higher-end construction and oil and gas pipe applications.”

---Section VI, pg. 164
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Other Studies

World Water Treatment Equipment
World demand for water treatment equipment is expected to grow 8.9 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.

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.

World Oil & Gas Pipe
World oil and gas pipe demand will rise 5.3 percent annually to 51.8 million metric tons in 2017 as high oil prices and growing energy demand spur new development. Gas pipe will grow at nearly four times the rate of oil pipe demand. Central and South America and the Asia/Pacific region will grow the fastest. This study analyzes the 40.1 million metric ton world oil and gas pipe industry, with forecasts for 2017 and 2022 by material, diameter, world region, and for 23 countries. The study also evaluates company market share and profiles industry participants.

Construction Outlook in China
Construction expenditures in China are expected to rise 8.5 percent per annum in real terms through 2017. Nonbuilding construction of transportation infrastructure and utility projects will see the fastest growth. The Central-East region will remain the largest market while the Northwest region will grow the fastest. This study analyzes the $13.3 trillion yuan construction industry in China, with forecasts for 2017 and 2022 by market, application, and geographic region. The study also evaluates company market share and profiles industry participants.

World Water Pipe
Global demand for water pipe is forecast to increase 7.5 percent per year through 2017 to 10.9 billion meters. China alone will account for one-third of the increase, with other industrializing countries in Asia -- such as India and Indonesia -- and in the Africa/Mideast regions also driving demand. Plastic pipe will be the fastest growing type. This study analyzes the 7.6 billion meter world water pipe industry, with forecasts for 2017 and 2022 by market, product, world region, and for 22 major countries. The study also evaluates company market share and profiles industry participants.

About The Freedonia Group

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