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World Plastic Pipe

Industry Study with Forecasts for **2017 & 2022**

Study #3015 | April 2013 | $6300 | 421 pages

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World Plastic Pipe

Industry Study with Forecasts for ***2017 & 2022***

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OVERVIEW

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INDUSTRY STRUCTURE

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Advances will come mainly from increased construction spending worldwide, and from the on-going 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.

World Plastic Pipe Demand, 2017
(11.2 billion meters)

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.

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Sample Text, Table & Chart

TABLE VI-10

**INDIA:
MACROECONOMIC INDICATORS & TOTAL PIPE DEMAND**

Item	2002	2007	2012	2017	2022
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2011$)					
% of GDP					
Gross Fixed Investment (bil 2011$)					
Construction Expenditures (bil 2011$)					
meters/capita					
meters/000$ GDP					
meters/000$ GFI					
construct pipe meters/000$ construct					
Total Pipe Demand (million meters)					
Construction					
Other					

SAMPLE TABLE

ASIA/PACIFIC

India: Plastic Pipe Markets

In length terms, plastic pipe demand in India is expected
just ... million me
incr... mestic cons
spe... tion related
tion... dia has the
sec... n becomes
urba... ll become g
addition, India is also home to a large agriculture sector and
facturing and oil and gas industries, all of which will contrib
pipe demand.

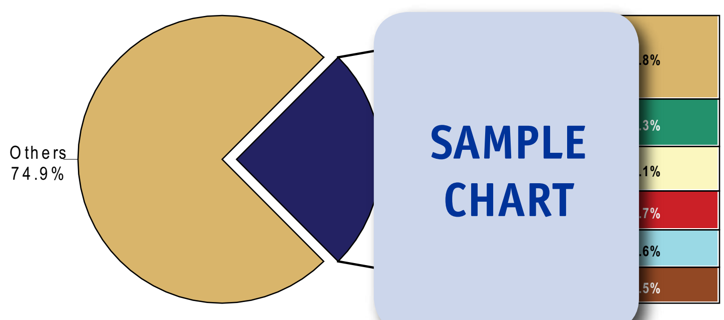
SAMPLE TEXT

Demand for plastic construction pipe in India will rise n
percent per annum to 418 million meters in 2017, advancing
rate than during the 2007-2012 period. Each segment of the
construction market will post double-digit annual gains throu
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 use
riculture sector and the oil and gas and process manufacturin
Increased oil and gas production levels will spur demand, si
pipe is used in both gathering and transmission applications.
India, which is the region's third largest producer of food an
products and the second largest manufacturer of chemicals, v

CHART VIII-1

**WORLD PLASTIC PIPE MARKET SHARE, 2012
($37.4 billion)**



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Sample Profile, Table & Forecast

TABLE VI-11

INDIA: PLASTIC PIPE DEMAND BY MARKET (million meters)

Item	2002	2007	2012	2017	2022
Total Pipe Demand					
% plastic					
Plastic Pipe Demand					
Construction:					
Residential					
Nonresidential					
Nonbuilding					
Other					

SAMPLE TABLE

COMPANY PROFILES

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

Annual Sales:
Employment:

Key Products: ethylene pipe

SAMPLE PROFILE

National inyl chloride (PVC) and high 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'

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"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 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.

#3103 .... December 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 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.

#3060 .... October 2013 .... $6100

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.

#3035 .... July 2013.................... $5300

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.

#3004 .... April 2013 .... $6100

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