World Plastic Pipe

Industry Study with Forecasts for 2019 & 2024

Study #3272 | July 2015 | $6500 | 432 pages
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Growth will be driven by strong construction activity, particularly in the large markets of China and the US, and the increasing use of plastic over competing pipe materials such as concrete, copper, and steel.

World demand to rise 6.7% annually through 2019

World demand for plastic pipe is projected to rise 6.7% per annum through 2019 to 19.3 billion meters. Strong construction activity, particularly in the large markets of China and the US, will boost demand as plastic pipe sees intensive use in both building and nonbuilding construction applications. Plastic’s performance, cost, and installation advantages will also spur its increasing use over competing pipe materials such as concrete, copper, and steel.

China, United States to drive global demand

Construction applications account for the largest share of plastic pipe demand and will support growth through the forecast period as global construction expenditures continue to increase more than five percent yearly through 2019. Although construction spending will decelerate in China, the world’s largest plastic pipe market, demand for plastic pipe in the country will still rise over nine percent annually through 2019. In the US, the world’s second largest market, continuing recovery in construction spending and housing completions will support rapid advances for plastic pipe demand.

Developing countries to also show robust growth

Growth in plastic pipe demand will also be robust in the developing countries of Africa, Asia, and South America due to efforts to expand access to potable water and sewage systems. The market opportunity for water and sewer systems is large, as a considerable share of the population in these regions does not have reliable access to drinking water supply or improved sanitation. The comparatively low cost and ease of installation of plastic pipe gives it advantages over other pipe materials in these regions.

Advances in plastic pipe demand in the more developed regions of Eastern and Western Europe are expected to accelerate through 2019, supported by recovering construction spending. Demand in both regions contracted following the global economic recession, but began to recover in 2013.

Plastic pipe to penetrate nontraditional markets

The energy, agriculture, and industrial sectors tend to be less intensive users of plastic pipe than is construction. However, improvements in technology and plastic materials have helped plastic pipe increase its share in many of these markets. For example, in oil and gas applications, plastic accounts for only a small share of the total pipe market, but increasing use of some materials, such as fiberglass in oil pipelines and HDPE in natural gas distribution, will support plastic pipe demand going forward.
Western Europe

France: Plastic Pipe Products

In terms of weight, demand for plastic pipe in France is forecast to increase 2.6% annually through 2019 to 468,000 metric tons. Demand for all resins will accelerate from slow growth during the 2009-2014 period, as the country’s economic condition improves. PVC and HDPE account for the majority of plastic pipe demand in France, with a 55 and a 36 percent share of the total in 2014, respectively. Other plastic resins that find use in France are ABS, fiberglass, and PP.

Demand for PVC pipe in France is expected to rise 2.2 percent per year to 254,000 metric tons. Although PVC will maintain its leading position in the French plastic pipe market, it will increase at the lowest rate of any resin through 2019. This is due in part to the domestic construction industry. For example, construction spending will advance less than two percent per year, below the regional average. Additionally, PVC has faced increased competition from other plastic resins in recent years, notably HDPE. However, construction of new housing units will offer some opportunities for growth.

Demand for HDPE pipe in France is forecast to expand at a 3.2 percent annual rate through 2019 to 172,000 metric tons. Growth will be spurred by the turnaround in fixed investment spending. HDPE, which can be used in large diameter sewer and drainage projects, has begun to supplant traditional materials like concrete because of its installation ease, light weight, and performance advantages. Advances will also result from increasing manufacturing activity, as HDPE can be used to transport chemicals and other materials. PEX pipe demand will be stimulated by the rising number of new housing units, as PEX is commonly used to deliver hot and cold water within homes.

Demand for other plastic pipe in France will be led by fiberglass that will arise in manufacturing markets where...
**COMPANY Profiles**

egeplast Werner Strumann GmbH & Company KG
Robert-Bosch-Straße 7
48268 Greven
Germany
49-2575-9710-0
http://www.egeplast.de

Sales: $143 million (2014, as reported by company)
Employment: 300 (estimated)

Key Products: polyethylene and polypropylene pipe for drinking water, wastewater, gas, telecommunications, geothermal energy, irrigation, and industrial applications. The Company is privately held.

egeplast Werner Strumann is a privately held manufacturer of polyethylene and polypropylene pipe for drinking water, wastewater, gas, telecommunications, geothermal energy, irrigation, and industrial applications. The Company is privately held.

The Company’s pipe products are typically used in open-trench and trenchless installations for underground end uses. Pipes from egeplast Werner Strumann, which are sold under the EGEPLAST brand name, are intended to resist point loads, scratches and scores, diffusions, leaks, and other damage. Among the EGEPLAST products are 9010 RC PLUS, SLM 3.0, SLM DCT, SLM KKS, SLA, 3L leak control, EGEMDR spring catchment, and HEXELONE high-pressure polyethylene water supply pipe; EGEDUCT and SLM DCT polypropylene, and SL polyethylene pipe for sewage applications; EGE-COM MICRODUCT and EGE-COM MACRODUCT cable protection polyethylene pipe. In addition, egeplast Werner Strumann produces large diameter pipe under the EGEPLAST XXL brand name.

Production and sales activities are conducted by egeplast Werner Strumann at a 176,000-square-meter facility in Greven, Germany.

**TABLE VI-5**

<table>
<thead>
<tr>
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<th>2019</th>
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<td>Pipe Demand % plastic</td>
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<td>159</td>
<td>366</td>
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<td>888</td>
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<tr>
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<td>312</td>
<td>381</td>
<td>509</td>
<td>702</td>
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</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

**STUDY COVERAGE**

This Freedonia study, *World Plastic Pipe*, presents historical data (2004, 2009, 2014) and forecasts (2019, 2024) for supply and demand, plus demand by market, in 6 regions and 24 major countries. The study also details key market environment factors, examines the industry structure, analyzes company market share and profiles 31 competitors in the global pipe industry.
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