

Market Study: Plastic Pipes - World (2nd ed.)



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- Associations and institutes
- Executive board, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement

In this brochure you will find the following information:

- An introduction on page 3
- A summary of the table of contents on page 4
- Following this, there are example pages from the study
- Please use the form on the last page to easily order your copy or a free reading sample!

Due to periods of extreme drought and old pipes that are in a poor condition, big cities, such as Sao Paulo, were confronted with severe water scarcity at many times. Problems of this sort can be mitigated with the help of modern, efficient pipe systems. In view of the climatic changes that are to be expected in the upcoming years, investments have to be much higher than they were in the past. However, the application area potable water supply is only a subsection of the market for plastic pipes. Ceresana expects demand for plastic pipes to increase to over 37 million tonnes until 2023.

The Right Choice of Material

Demand for pipes in a country is to a large extent dependent on the development of the particular activities in civil engineering and building construction: Applications like sewage disposal, potable water supply, or cable protection are directly connected to the situation of the construction industry. The degree of importance various application areas have for the different types of pipes varies considerably. For example, pipes made of polyvinyl chloride (PVC) are relatively cheap and are thus used extensively in the sewage, potable water, and cable protection sectors. Yet, pipes based on polypropylene (PP) and polyethylene (PE) increasingly compete with PVC pipes in the segment potable water - and they already play a major role in the application areas "gas supply" and "industrial products". The market for plastic pipes is split in this study by

the resin types PE, PP, PVC, and "other plastics", both in regard to production volume as well as to demand volume.

Development in the Construction Industry Is Decisive

The underlying trend to replace pipes made of steel, stoneware, and other material with plastic pipes is overlaid by current circumstances of the national construction economies. Decreasing public expenditure or missing private investments can have similarly drastic effects on the construction industry and the pipe market as political uncertainties or targeted support for single construction segments. The intensity of the promotion of investments in the segment irrigation or the expansion of the fiber optic network can also vary from country to country. Chapters 2.1.1 to 2.5.5 examine the influential factors of this market for each country.

New Applications & Products

New and improved systems for protection against exhaust emission are constantly developed in the segment industrial pipes, e.g. new techniques for the construction of multiple-layer pipe systems and the leakage monitoring. The oil and gas industry has applied increasing numbers of polyamide PA 12 instead of steel pipes for several years: This material only absorbs small amounts of water, has a high impact strength, and can be used in a broad temperature range. Possible application areas are, among others, gas pressure pipes or liners. The most important innovations

in the segment plant drainage are sound insulation and noise protection systems.

The Study in Brief:

Chapter 1 provides a presentation and analysis of the market – including forecasts up to 2023: Revenues (in USD & EUR) generated with plastic pipes and production of and demand (in tonnages) for plastic pipes are given for each region. Chapter 2 examines the 16 largest countries of the market in more detail: Revenues, import, and export are indicated here. Production and demand volume is split by the plastic types PE, PP, PVC and other plastics. Additionally, demand in the individual application areas is analyzed in detail.

Chapter 3 deals with the application areas of plastic pipes within the individual regions and countries: Data on demand development, split by the seven regions Western & Eastern Europe, North & South America, Asia-Pacific, the Middle East, and Africa are given. The division of the application areas is as follows: Sewage, Potable Water, Cable Protection, Gas Supply, Agriculture, and Industrial Products.

Chapter 4 provides an overview of the demand for individual types of pipes split by national and regional markets. The following types are treated: PE Pipes, PP Pipes, PVC Pipes, Pipes made from other plastics. Chapter 5 provides profiles of the largest 76 manufacturers of plastic pipes – clearly arranged according to contact details, turnover, profit, product range, production sites, and profile summary.

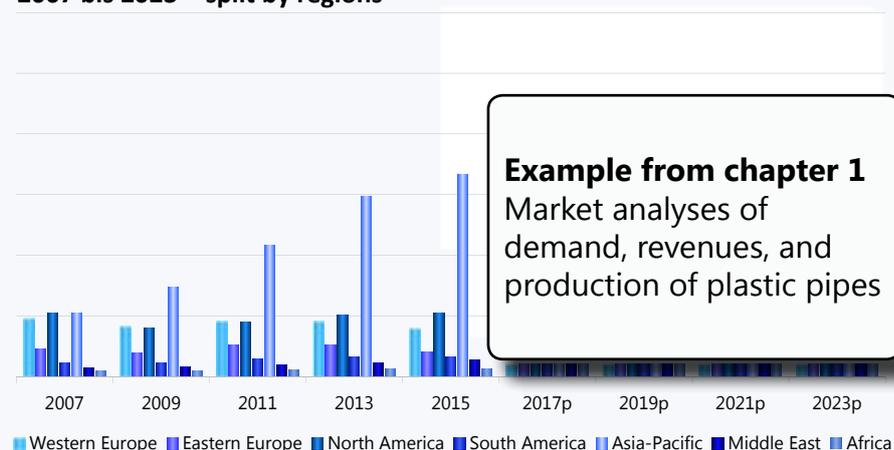
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Worldwide revenue with plastic pipes in billion USD from 2007 bis 2023 - split by regions Ceresana



Example from chapter 1
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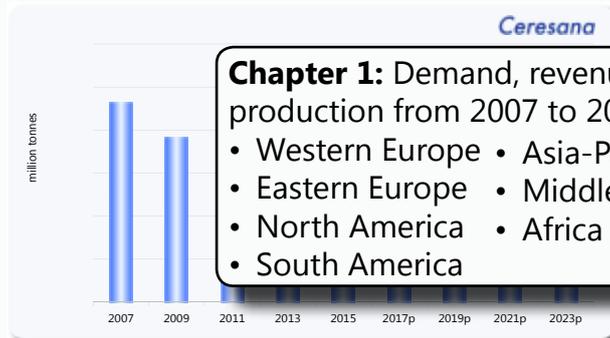
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1.4.3 North America - Production

About X million tonnes were produced throughout North America in 2015. We expect output to increase to X million tonnes between 2015 and 2023; despite low growth rates, the USA will continue to dominate the North American market accounting for about X% of regional production.



Chapter 1: Demand, revenues & production from 2007 to 2023:

- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East
- Africa

Graph: Production of plastic pipes in North America from 2007 to 2023

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
Canada	X	X	X	X	X	X	X	X	X	X% p.a.
Mexico	X	X	X	X	X	X	X	X	X	X% p.a.
USA	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

Table 1: Production of plastic pipes in North America from 2007 to 2023 – split by major countries

2.5.2.1 India - Demand and Revenues

Private and public sewage disposal is still only rudimentarily developed in large parts of the country. On the one hand, hygiene awareness of the population is oftentimes relatively low and, on the other hand, material infrastructure would not be able to grant regulated sewage disposal. Besides modern, efficient treatment plants, there is also a need for high investments especially in the segment piping systems. The twelfth five-year plan (2012 to 2017) already deals explicitly with this topic. The fact that only approx. X% of the towns have a sewage disposal system and a sewage treatment plan shows how important an intensive discussion of this topic will be in the upcoming years. Only X% of incidental sewage is disposed of and treated in a controlled manner: A mammoth task for the future; and at the same time an immense potential for manufacturers of plastic pipes. We expect a constant significant growth despite the current crisis of the construction industry.

Almost X% do not have any access to treated drinking water yet. The infrastructure in large parts of the country is still insufficient. Often enough, potable water supply in the cities is also fragile and malfunction of important pipes occurs again and again. Modernization of the existing system is a declared aim. But also the connection of the peripheral urban areas which are oftentimes informally built is a target of the five-year plans. Moreover, X% of the development of the rural areas is supposed to be achieved by 2022. These factors will provide significant impulses for the demand for plastic pipes.

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
Sewage	X	X	X	X	X	X	X	X	X	X% p.a.
Potable Water	X	X	X	X	X	X	X	X	X	X% p.a.
Cable Protection	X	X	X	X	X	X	X	X	X	X% p.a.
Gas	X	X	X	X	X	X	X	X	X	X% p.a.
Agriculture	X	X	X	X	X	X	X	X	X	X% p.a.
Industrial Products	X	X	X	X	X	X	X	X	X	X% p.a.
Other	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

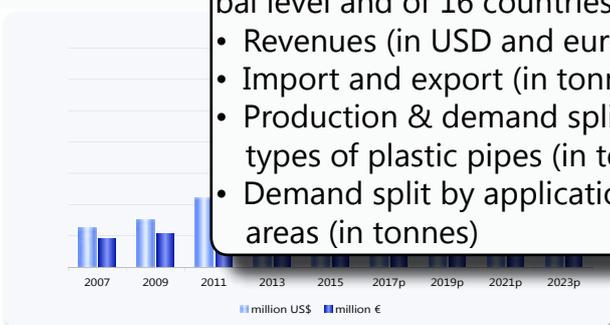
Table: Demand for plastic pipes in India from 2007 to 2023 – split by applications

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
PE Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
PP Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
PVC Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
Other Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

Table: Demand for plastic pipes in India from 2007 to 2023 – split by types of plastics

Revenues

About USD X billion were generated with the sale of plastic pipes in India in 2015. We forecast a market value of approx. X billion USD and X billion EUR by 2023.



Chapter 2: Market data at a global level and of 16 countries:

- Revenues (in USD and euros)
- Import and export (in tonnes)
- Production & demand split by types of plastic pipes (in tonnes)
- Demand split by application areas (in tonnes)

Graph1: Revenues generated with plastic pipes in India from 2007 to 2023 in million USD and million EUR

2.5.2.2 Production and Trade

Production volume of plastic pipes rose to more than X million tonnes in 2015. PVC pipes had the largest share of production in 2015. Production volume amounted to about X million tonnes. PE- and PP-based pipes followed at a significant distance; output of pipes made of other plastics only amount to X tonnes. Production volume of PVC pipes will only develop averagely in the upcoming eight years but it will still be the most frequently used type of plastic pipes in 2023.

We forecast output to increase at above-average growth rates of X% p.a. in the upcoming eight years. Accordingly, production volume will rise to approx. X million tonnes in 2023. Important manufacturers in India are Finolex Industries Ltd. and Jain Irrigation Systems Ltd.

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
PE Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
PP Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
PVC Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
Other Pipes	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

Table: Production of plastic pipes in India from 2007 to 2023 – split by types of plastics

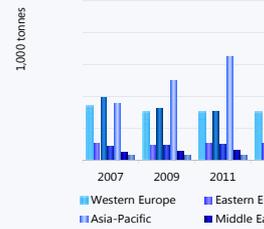
3.1.1 Sewage

Working sewage systems are contributing significantly to environmental protection. The pipes have to be leak-proof, need to possess a durable resistance to corrosion and be hydraulically efficient. Where the decline is insufficient for gravity pipes, the sedimentation risk is too high or natural reserves have to be passed safely, the installation of sewage-pressure pipes is common. Flexible plastic pipes that can adjust to ground motion reduce the risk of leaks. Smooth surfaces on the inside prevent deposits and reduce maintenance requirements; speed necessary for self-cleaning can be reached more quickly. Another advantage is their good abrasion resistance. Plastic pipes are suitable for highly different types of soil, are not infested by fungi, bacteria or insects and do not require protective casings. In the sewage sector, down and pressure pipes, sludge pipelines and vacuum systems are among the pipe products made of plastics. Another common application is the repair of pipes made of other materials. Ducts and the corresponding fittings are usually made of PVC-U, PP or glass fiber reinforced plastics. Welded piping systems utilize rods and coils based on PE. Shafts are usually produced from the raw materials PE, PP, PVC-U, or GRP. Small waste or overflow systems are also made of ABS. Rain gutters are also based on plastics. Domestic waste system piping for sewage applications within buildings are manufactured from PE, PP, and styrene copolymerizates (ABS/ASA/PVC).

In 2015, about X million tonnes of plastic pipes were used worldwide for the application sewage. Thus, demand for plastic pipes in this application area rose at an average rate of X% p.a. since 2007. Given an expected X% p.a. increase, global demand for plastic pipes used in the sewage segment will amount to approx. X million tonnes in 2023.

Chapter 3: Demand split by applications (in tonnes):

- Sewage
- Potable Water
- Cable Protection
- Gas Supply
- Agriculture
- Industrial Products
- Other Applications



Graph: Worldwide demand for plastic pipes in sewage from 2007 to 2023 – split by regions

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
Western Europe	X	X	X	X	X	X	X	X	X	X% p.a.
Eastern Europe	X	X	X	X	X	X	X	X	X	X% p.a.
North America	X	X	X	X	X	X	X	X	X	X% p.a.
South America	X	X	X	X	X	X	X	X	X	X% p.a.
Asia-Pacific	X	X	X	X	X	X	X	X	X	X% p.a.
Middle East	X	X	X	X	X	X	X	X	X	X% p.a.
Africa	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

Table: Worldwide demand for plastic pipes in sewage from 2007 to 2023 – split by regions

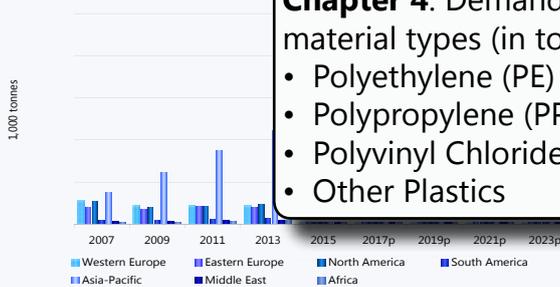
4.2 Polypropylene

4.2.1 World

In 2015, about X million tonnes of polypropylene pipes (PP pipes) were used worldwide. In the past eight years, demand rose thus at an average rate of X% per year. Around X% of global demand in 2015 originated in the region Asia-Pacific. North America ranked second, followed by Western Europe. Far behind, Eastern Europe, South America, the Middle East, and Africa revealed significantly lower market shares. The strongest relative increase during the next eight years is projected for the Middle East. Market volume in this region is likely to increase by an average of X% p.a. to approx. X tonnes in 2023. Eastern Europe and South America will develop more strongly than the more industrialized regions North America and Western Europe. The latter will incur the least dynamic development; until 2023, market volume will only rise by, on average, X% per year. Overall global demand for PP pipes will rise by about X% p.a. to approx. X million tonnes until the end of our forecasting horizon.

Chapter 4: Demand split by material types (in tonnes):

- Polyethylene (PE)
- Polypropylene (PP)
- Polyvinyl Chloride (PVC)
- Other Plastics



Graph2: Worldwide demand for PP pipes from 2007 to 2023 – split by regions

4.2.3 Eastern Europe

East European processors consumed X tonnes of PP pipes in 2015. Compared to 2007, this corresponds to a decline of X% per year. With a demand volume of X tonnes in 2015, major consumer in the region Eastern Europe was Russia, followed by Poland and Turkey. The highest growth rate of, on average, X% p.a. is anticipated for Poland. Total demand in this region will amount to approx. X tonnes in 2023. Compared to 2015, this corresponds to an annual increase of, on average, X%.

in 1,000 tonnes	2007	2009	2011	2013	2015	2017p	2019p	2021p	2023p	2015 - 2023
Poland	X	X	X	X	X	X	X	X	X	X% p.a.
Russia	X	X	X	X	X	X	X	X	X	X% p.a.
Turkey	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X% p.a.								

Table: Demand for PP pipes in Eastern Europe from 2007 to 2023 – split by major countries

Georg Fischer AG
 Amsler-Laffon-Strasse 9
 8201 Schaffhausen
 Switzerland
 Tel.: +41 52 631 11 11
 Web: www.georgfischer.com

Financial Key Data (in billion CHF)

Year	Net Profit	Revenues
2015	0,20	3,64
2014	0,20	3,80
2013	0,15	3,77
2012	0,13	3,74

General Information about the Company

2015 sales divided by business segments

Segment	Percentage
GF Piping Systems	39%
GF Automotive	25%
GF Machining Solutions	36%

2015 sales divided by regions

Region	Percentage
Germany	28%
Other Europe	23%
Rest of the World	22%
Asia	14%
North/South America	6%
Switzerland	4%
Switzerland	3%

Production Sites
 The Georg Fischer AG has production sites in 16 countries, including Germany, Switzerland, and South America.

Chapter 5: Data and facts on 76 producers, clearly arranged by:

- Financial key data
- Production sites & capacities
- Profile summary
- Product details

Profile Summary

The Georg Fischer AG (GF) was founded in 1802. The company is listed at the Swiss Stock Exchange and employs about 14,400 people (Dec 31st, 2015). In 2015, total assets were CHF 3.08 billion.

The company is divided into the divisions GF Piping Systems, GF Automotive, and GF Machining Solutions. GF Piping Systems develops, manufactures, and markets a broad range of piping systems made of different materials for the safe transport of water, gases, and aggressive substances. GF Automotive develops solutions for the automotive and the commercial vehicle industries while the third division GF Machining Solutions offers machines and automation solutions for the tools and mold making industries, as well as for manufacturers of precision parts and components, and service performance. All production sites are certified according to ISO 9001 (quality management), ISO 14001 (environmental management), and OHSAS 18001.

In 2016, the company's division GF Machining Solutions took over all shares of Microtution Inc., a US specialist for micro-machining with milling machines and laser technology. Furthermore, the division GF Piping Solutions acquired the Indonesian pipeline manufacturer PT Eurapipe Solutions Indonesia.

In 2015, GF established a joint venture with Linamar Corp. (Canada) which operates under the name GF Linamar LLC. Additionally, the company completed a cooperation agreement with EOS in the course of starting the industrial 3D printing business.

Specific Information About Plastic Pipes

GF's business segment GF Piping Systems offers various PE100 pipes with a length of 5 m and diameters of at least 10 mm to a maximum of 500 mm, which are suitable for all underground gas and water pipelines, building equipment, and industrial pipeline construction. Additionally, the company offers pre-insulated metric ABS plastic pipes for secondary cooling and freezing pipeline systems as well as different types of pipes for industrial and heating technologies, energy, shipbuilding, and other applications. The pipes are available in different forms and sizes.

Chapter 5: Detailed profiles of the most important manufacturers, such as Aliaxis, Fondital, Geberit, Georg Fischer, JM Eagle, Kazanorgsintez, REHAU, Sekisui Chemical, Tesslerlo, Tigre Tubos e Conexões, and Toagosei.

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