

Market Study: Plastic Pipes

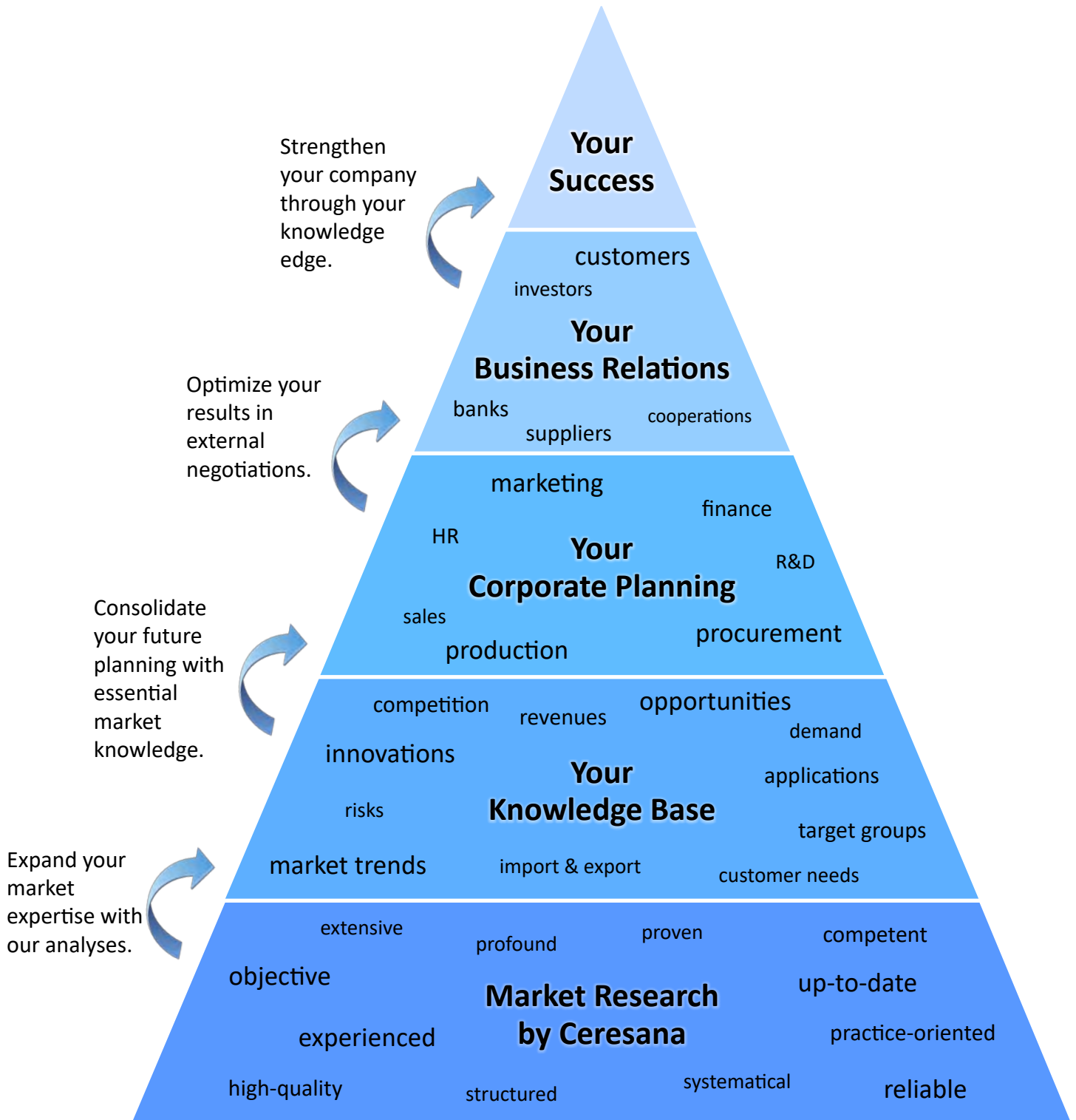


Europe Report (6th edition)

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This brochure provides further information on the study “Plastic Pipes - Europe (6th edition)”

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(For each country: Revenues, production and trade as well as demand per products and applications)

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- Finland (1)
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- Romania (1)
- Russia (2)
- Serbia (1)
- Spain (4)
- Sweden (1)
- Switzerland (8)
- The Netherlands (4)
- Turkey (7)
- United Kingdom (5)

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Financial Key Data (in billion CHF)

Year	Net Income	Total Revenues
2021	0.76	3.46
2020	0.64	2.99
2019	0.65	3.08
2018	0.63	3.08

General Information about the Company

Divisions, Product Range The company operates in the following business fields:

- Installation and flushing systems
- Piping systems
- Bathroom systems

Production Sites The Geberit Group owns 26 production plants, of which 4 are located overseas

Profile Summary The company was founded in 1874 and is active in the segment sanitary installations. Geberit offers sanitary and pipeline systems, as well as ceramics, bathroom furniture, showers, and tubs. Geberit has been listed on the Swiss stock exchange since 1999 and on the SMI (Swiss Market Index) since 2012. In 2021, the company employed around 11,809 people and total assets amounted to CHF 3.77 billion. The R&D expenditures reached CHF 78 million.

Split by business fields, 38% of the 2021 total net sales were generated with installation and flushing systems, 31% with piping systems, and 31% with bathroom systems.

Split by business regions, Geberit generated 31% of its 2021 total sales in Germany, 10% in the Nordic countries, 10% in Switzerland, 10% in Eastern Europe, 8% in Benelux, 7% in Italy, 5% in France, 6% in Austria, 3% in the United Kingdom & Ireland and 10% in other markets.

The company's quality and environmental management system is ISO 9001 and ISO 14001 certified. Additionally, the company is certified according to OHSAS 18001.

Specific Information about Plastic Pipes

Geberit produces plastic pipes for drinking water and gas supply as well as building drainage. The product portfolio includes:

- Geberit Silent-db20: made of PE for buildings with increased sound insulation requirements.
- Geberit system pipe ML: 3-layer pipe made of PE-RT used in the supply systems FlowFit and PushFit.
- Geberit system pipe PB: pipe made of PB used for the supply systems FlowFit and PushFit. It is suitable for the supply of hot and cold drinking water.
- Geberit MEPLA: 3-layer pipes made of PE-RT with corrosion-resistance and food-safe character. Mainly used for the supply of water and inert gases.
- Geberit PE: pipes made of PE suitable for building drainage, roof drainage, for placement in the ground, in concrete or in bridge construction.

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

Market Study: “Plastic Pipes - Europe (6th edition)”

24 Countries, 73 Producers, 260 Pages, 51 Graphs, 128 Tables, 01/2023

Summary

Chapter 1 provides an in-depth analysis of the European market for plastic pipes – including forecasts up to 2031. Key figures are given for **revenues** (in USD and EUR) and **demand** (in tonnes), both broken down by type of plastic (PE, PP, PVC, other plastics) and area of application.

Chapter 2 provides specific market data on plastic pipes for 24 European countries: Revenue, **import** and **export**, production as well as demand volumes are given.

The data on **production** and **demand** are broken down into the **plastic types**:

- Polyethylene (PE)
- Polypropylene (PP)
- Polyvinyl chloride (PVC)
- Other plastics.

In addition, **demand** is presented for each country, broken down into the various **application areas**:

- Sewage
- Potable water
- Cable protection
- Gas
- Agriculture
- Industry
- Other applications.

Chapter 3 provides **company profiles** of the most important plastic pipe manufacturers in Europe, clearly arranged according to contact details, revenues, profits, product range, production sites and brief profile.

Detailed profiles are provided by the 73 most important producers, such as Aalberts, Aliaxis, Fränkische Rohrwerke, Geberit, Georg Fischer, Pipelife, Polyplastic, REHAU, Tessenderlo, Uponor, and Wavin.

2.18 Spain

2.18.1 Demand and Revenues

In 2021, the demand for plastic pipes reached a volume of X tonnes. According to our forecast, this will result in average growth of X% per year over the next ten years. In Spain, plastic pipes generated revenues of approximately EUR X billion in 2021. For the next ten years, we expect the market volume to increase by approximately X% per year.

Revenues	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031p
million USD	X	X	X	X	X	X	X	X	X	X % p.a.
million EUR	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Revenues generated in Spain from 2019 to 2031, in million USD and million EUR

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031p
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.
Industry	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	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Spain from 2019 to 2031 – split by applications

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031p
Polyethylene	X	X	X	X	X	X	X	X	X	X % p.a.
Polypropylene	X	X	X	X	X	X	X	X	X	X % p.a.
PVC	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	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Spain from 2019 to 2031 – split by products

2.18.2 Production and Trade

The production volume of plastic pipes amounted to X tonnes in 2021. For the next ten years, we forecast slight positive development overall: the volume of plastic pipes produced in Spain is expected to amount to approximately X tonnes in 2031.

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031p
Production	X	X	X	X	X	X	X	X	X	X % p.a.
Import	X	X	X	X	X	X	X	X	X	X % p.a.
Export	X	X	X	X	X	X	X	X	X	X % p.a.
Demand	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Production, import, export, and demand in Spain from 2019 to 2031

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031p
Polyethylen	X	X	X	X	X	X	X	X	X	X % p.a.
Polypropylen	X	X	X	X	X	X	X	X	X	X % p.a.
PVC	X	X	X	X	X	X	X	X	X	X % p.a.
Sonstige	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Production in Spain from 2019 to 2031 – split by products

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