

Market Study: Plastic Pipes



Europe Report (6th edition)

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

The Market Study in Brief

Profiting from climate change and the energy crisis? Pipe manufacturers are certainly not short of tasks: Whether cities are preparing their infrastructure for more frequent heavy rainfall, new wind farms or heat pumps are being connected, networks for district heating and cooling are being built - many current construction projects require the installation or expansion of pipelines. Ceresana has analyzed the European market for the sixth time and estimates the demand volume for the year 2021 at approx. 5.01 million tonnes.

Challenges for the construction industry

Plastics are increasingly replacing more traditional materials such as steel and concrete for pipes in the construction industry. The comparatively inexpensive but robust pipes made of PVC are mainly used for wastewater and cable protection. Increasingly, other types of plastic are also gaining market share: In drinking water supply, pipes based on PP and PE are competing with PVC pipes. PP and PE pipes are already widely used in industrial applications and gas supply. However, the construction industry is now facing a difficult year in 2023: the rapidly rising cost of construction materials is hampering development. .

Pipes for broadband cables and irrigation

Products for agriculture are among the areas of application for plastic pipes that are currently developing most dynamically. Droughts and long dry spells are becoming more frequent. Efficient irrigation systems with sensor technology and easy-to-maintain plastic pipes can at least reduce losses for agriculture and horticulture. Ceresana forecasts that the increase in extreme weather phenomena will increase demand for plastic pipes for irrigat-

ing agricultural land by around 1.2% per year. However, the fastest-growing area of application is cable protection: digitization and the expansion of fiber optic networks make it necessary for expensive broadband cables to be shielded against harmful environmental influences with plastic pipe casings.

Overview of the study:

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 application.

Chapter 2 provides specific market data for 24 countries: Revenue, import and export, production as well as demand are given. The data on production and demand are broken down into PE, PP, PVC and other plastics. In addition, demand is presented for each country, broken down into the various applications:

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

Chapter 3 provides company profiles of manufacturers, clearly arranged according to contact details, revenues, profits, product range, production sites and brief profile. Detailed profiles are provided by the 71 most important producers, such as Aalberts, Aliaxis, Fränkische Rohrwerke, Geberit, Georg Fischer, Pipelife, Polyplastic, REHAU, Tessengerlo, Uponor, and Wavin.

Table of Contents (1/3)

1 Market Data: Europe

1.1 Demand

1.2 Revenues

1.2 Production

1.4 Demand per Application

1.1.3.1 Sewage

1.1.3.2 Potable Water

1.1.3.3 Cable Protection

1.1.3.4 Gas

1.1.3.5 Agriculture

1.1.3.6 Industry

1.1.3.7 Other Applications

1.5 Demand per Product

1.5.1 Polyethylene Pipes

1.5.2 Polypropylene Pipes

1.5.3 PVC Pipes

1.5.4 Pipes made from other Plastics

1.6 Production per Product

1.6.1 Polyethylene Pipes

1.6.2 Polypropylene Pipes

1.6.3 PVC Pipes

1.6.4 Pipes made from other Plastics

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	2021-2031
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	2021-2031
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	2021-2031
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	2021-2031
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	2021-2031
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

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

24 Countries, 71 Producers, 260 Pages, 51 Graphs, 124 Tables; 01/2023

Table of Contents (2/3)

2 Market Data: Countries

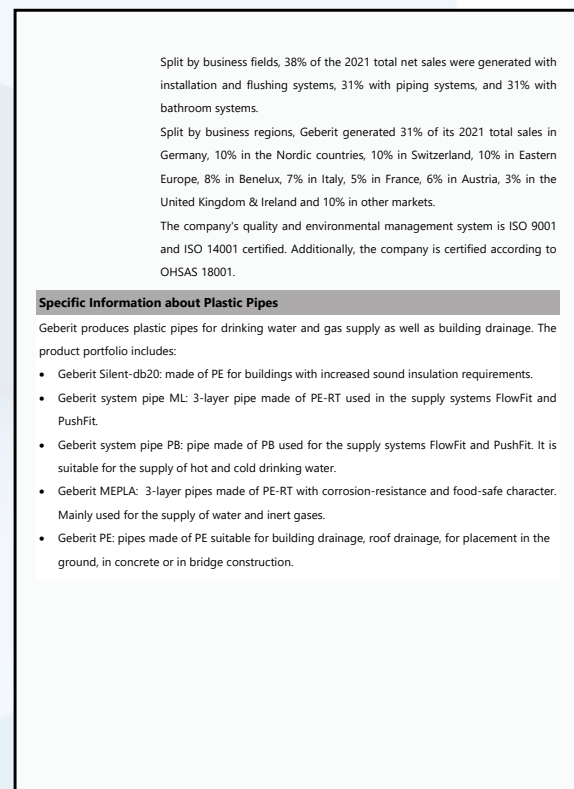
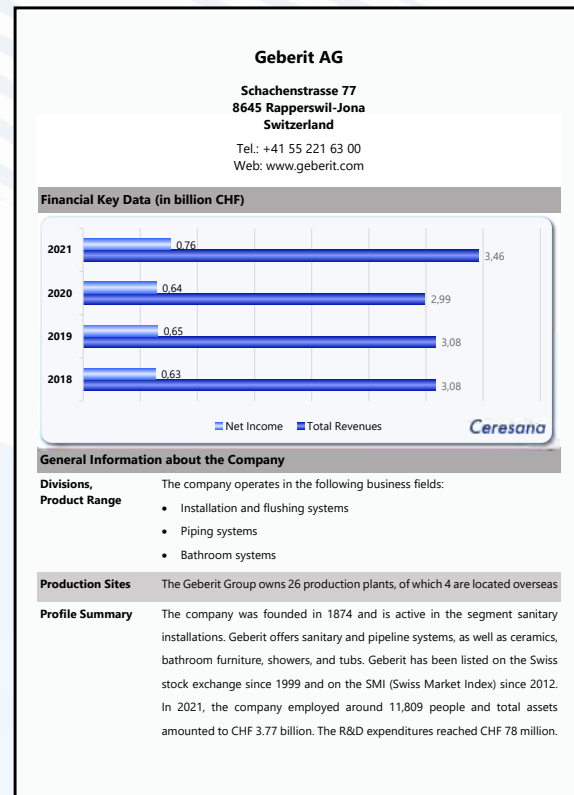
(For each country: revenues, import & export as well as demand and production per product. Additionally for the largest 8 countries demand per application.)

- 2.1 Austria
- 2.2 Belgium
- 2.3 Czechia
- 2.4 Denmark
- 2.5 Finland
- 2.6 France
- 2.7 Germany
- 2.8 Greece
- 2.9 Hungary
- 2.10 Italy
- 2.11 Norway
- 2.12 Poland
- 2.13 Portugal
- 2.14 Romania
- 2.15 Russia
- 2.16 Serbia
- 2.17 Slovakia
- 2.18 Spain
- 2.19 Sweden
- 2.20 Switzerland
- 2.21 The Netherlands
- 2.22 Turkey
- 2.23 United Kingdom
- 2.24 Other Countries

Table of Contents (3/3)

3 Company Profiles*

Austria (6 Producers)
Belgium (4)
Denmark (1)
Finland (1)
Germany (18)
Italy (9)
Norway (1)
Romania (1)
Russia (2)
Serbia (1)
Spain (3)
Sweden (1)
Switzerland (8)
The Netherlands (4)
Turkey (6)
United Kingdom (5)

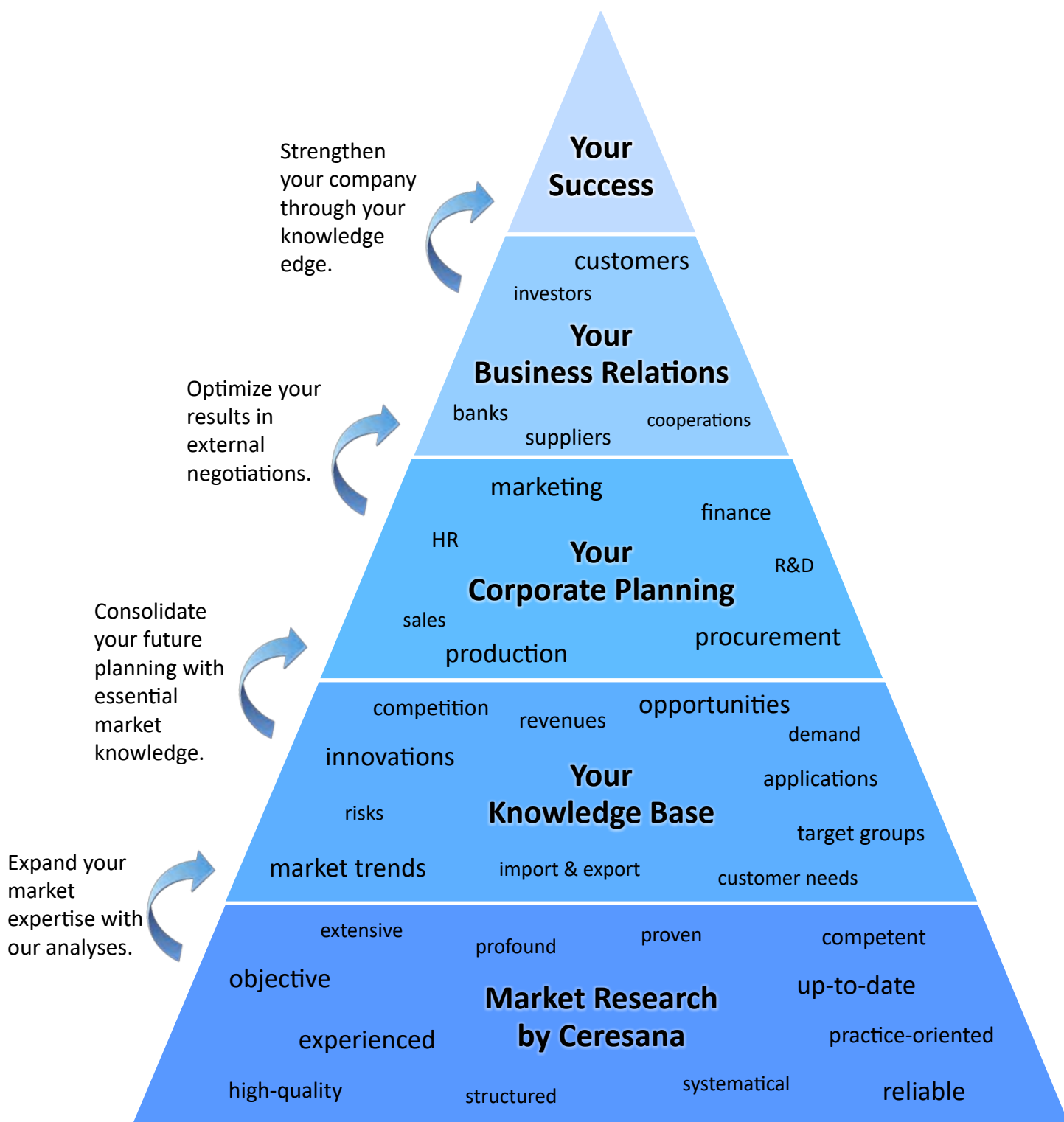


*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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- Executive boards, finance, business development, strategic planning, market research, marketing, sales, distribution, R&D, and procurement



**Thank you
for your trust!**



**If you have any questions, please
do not hesitate to contact us.**



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