Market Study: Plastic Pipes

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This brochure provides further information on the study “Plastic Pipes – Europe (8th edition)”

Executive Summary

Will the economic upturn finally come in 2026? There is hope, at least for manufacturers of plastic pipes. For some time, the European market for these products stagnated at around 5 million tonnes per year. However, Ceresana market researchers are now expecting a slight recovery in demand: EU directives on drinking water (DWD) and urban waste water treatment (UWWTD) are gradually coming into force and driving the expansion of water pipe networks. Adapting to climate change and extreme weather events requires investment in new pipes. In addition, there is a growing need for empty conduits to protect power and telecommunication lines: For cable protection, often made of polyethylene, Ceresana expects growth of 1.7% per year.

Plastic Pipes for Indoor and Outdoor Use

The latest edition of Ceresana’s European plastic pipe market report distinguishes for the first time between in-building installations and external utility networks when it comes to the key figures for the two application areas “potable water” and “sewage”. The trend continues towards lightweight, durable plastics: Old metal pipes are replaced with new pipes made of polypropylene random copolymer (PP-R pipes) or cross-linked polyethylene (PE-X pipes), particularly during renovations. Glass fiber reinforced plastics (GRP) are used in particular for large pipes where rigidity and corrosion resistance are required. The market share of these pipes is still low. However, Ceresana’s industry analysis expects high growth of around 3% per year for GRP pipes, although the prospects for this depend on a few major projects. Ceresana is forecasting growth of 1.4% for polyethylene pipes, which are used in particular for potable water, irrigation, and parts of gas networks. One of the reasons for the increasing demand for plastic pipes is the trend towards trenchless construction methods, among other things.

Opportunities and Risks for Plastic Pipes

The European construction industry could recover from 2026 onwards. However, many construction projects are held up by bureaucratic approval procedures, a shortage of skilled workers, and rising construction and financing costs. Municipal projects are particularly affected by budget cuts; on the other hand, there are large government investment programs for infrastructure. With a “European Grid Package” and new “energy highways”, the European Union wants to expand the trans-European energy networks, especially the cross-border electricity, gas, and hydrogen pipelines. In addition to market data and forecasts, the new study also contains background information on the regulatory framework in the EU as well as the general economic situation and the situation in the construction industry in various European countries (including important companies, construction activities, investments, planned construction projects).

Market Study “Plastic Pipes – Europe”:

Chapter 1 analyzes the entire European market for plastic pipes and provides forecasts up to the year 2034. Key figures are provided on revenues (split by 7 applications) as well as demand (split by 7 applications, 5 plastic types, and 4 construction segments) and production volumes (split by 4 plastic types).

Chapter 2 provides specific market data for 23 European countries: Revenues, imports and exports, production and demand volumes.

Chapter 3 provides company profiles of the 59 largest plastic pipe manufacturers in Europe, for example of Aalberts, Aliaxis, Geberit, Georg Fischer, Pipelife, POLYPLASTIC, Rehau, Tessenderlo, Viega, and Wavin.

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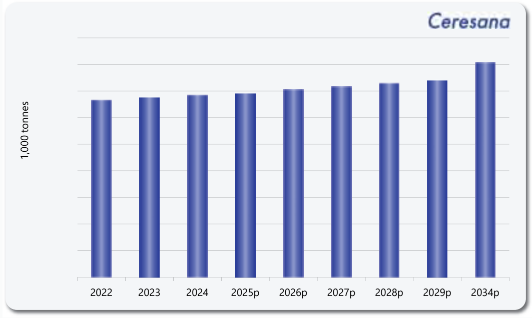
2.12 Poland

2.12.1 Demand and Revenues

The total demand for plastic pipes in Poland amounted to approx. X tonnes in 2024. We forecast demand to increase by X% p.a. to approx. X tonnes in 2034.
The Polish market volume regarding revenues amounted to approx. EUR X million in 2024. We expect a value of around EUR X billion for 2034.



Graph1: Demand in Poland from 2022 to 2034

Revenues	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
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.

Table1: Revenues generated in Poland from 2022 to 2034, in million USD and million EUR

Million EUR	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Sewage	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**
In-Building Installations	X	X	X	X	X	X	X	X	X	X% p.a.
External Utility Networks	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.**
In-Building Installations	X	X	X	X	X	X	X	X	X	X% p.a.
External Utility Networks	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: Revenues generated in Poland from 2022 to 2034 – split by application

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
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.
GRP	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 Poland from 2022 to 2034 – split by product

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in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Sewage	X	X	X	X	X	X	X	X	X	X% p.a.
In-Building Installations	X	X	X	X	X	X	X	X	X	X% p.a.
External Utility Networks	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.
In-Building Installations	X	X	X	X	X	X	X	X	X	X% p.a.
External Utility Networks	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 Poland from 2022 to 2034 – split by application

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
New Construction	X	X	X	X	X	X	X	X	X	X% p.a.
Renovation	X	X	X	X	X	X	X	X	X	X% p.a.
Residential	X	X	X	X	X	X	X	X	X	X% p.a.
Non-Residential	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 Poland from 2022 to 2034 – split by construction segment

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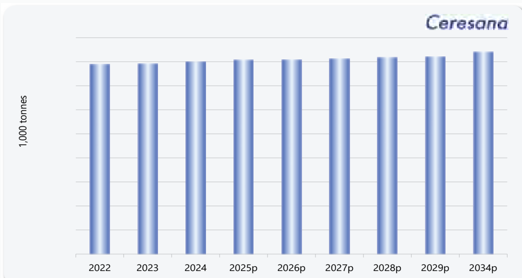
2.12.2 Production and Trade

Around X tonnes of plastic pipes were produced in 2024. We forecast production volume to amount to approx. X tonnes in 2034. Compared to 2024, this constitutes an average increase of X% per year.

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
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 Poland from 2022 to 2034



Graph: Production in Poland from 2022 to 2034

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
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: Production in Poland from 2022 to 2034 – split by product

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3 Company Profiles*

REHAU Industries SE & Co. KG

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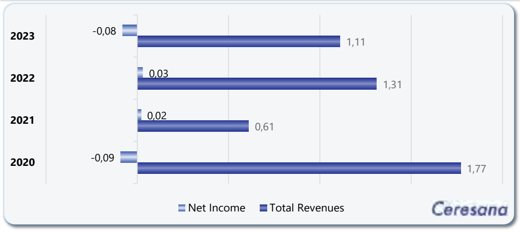
Web: www.rehau.com

Financial Key Data (in Billion EUR)



*Financial data before 2021 refers to REHAU AG + Co. 2021 is the short financial year of REHAU Industries SE & Co. KG.

General Information about the Company

Divisions, Product Range	The company operates in the following business divisions: • Building and Infrastructure Solutions • Window Solutions • Interior Solutions • Industrial Solutions • REHAU Services and Solutions
Production Sites	REHAU Industries SE & Co. KG operates numerous production sites worldwide.
Profile Summary	**General information:** REHAU Industries SE & Co. KG was founded in 1948 under the name REHAU AG + Co and is part of the REHAU Group. The group employs over 20,000 people at 170 locations in 54 countries. REHAU manufactures different products, including polymer-based solutions and systems for the sectors

automotive, construction, and furniture. In November, 2021, REHAU AG + Co was transferred to the newly founded REHAU Industries SE & Co. KG.

REHAU Industries SE & Co. KG employed around 5,000 people in 2023.

Financial information:

In the same year, total assets amounted to EUR 452 million.

Divided by business segment, 19.1% of the 2023 revenues were generated with Window Solutions, 22.8% with Interior Solutions, 32.1% with Building and Infrastructure Solutions, 19.3% with Industrial Solutions, and 6.7% with REHAU Services and Solutions.

Split by region, 47.05% of revenues in 2023 were generated in Germany, 46.95% in the rest of Europe, 2% in North America, 0.5% in Australia, 1% in South America, 2% in Asia, and 0.5% in Africa.

ISO certifications:

The company is certified according to ISO 9001 and ISO 14001.

Specific Information about Plastic Pipes

In the building solutions segment, REHAU produces industrial pipe systems made of plastics. They include:

- RAUTITAN (RAUTITAN stabil/flex/RX+/PX): universal plumbing pipe system made of cross-linked polyethylene, without O-rings, matching fittings and compression sleeves and using compression-sleeve joints for hygienic potable water and heating distribution. REHAU also offers RAUTITAN flex green pipes made from renewable, bio-based raw materials.
- RAUTITAN Gas: PE-X/Al/PE multilayer gas pipe with compression-sleeve fittings, flexible and kink resistant thanks to highly malleable aluminum layer coupled with thicker PE-Xa inliner, suitable for natural gas/LPG and water applications in houses and commercial buildings.
- RAUPEX O2 barrier pipe: PE-Xa pipe paired with an extra layer of co-extruded EVOH oxygen diffusion barrier, suitable for potable hot/cold water, residential/commercial plumbing.
- RAUPEX UV shield pipe: PE-Xa pipe and EVERLOC+ fittings. Applications: wet residential sprinkler systems (stand-alone or multipurpose).
- RAUGEO (geoexchange/geothermal): PE-Xa probes/collectors/piles for ground-source heat pumps (incl. RAUGEO PE-Xa green probes). Applications: ground loops for heating/cooling, often paired with radiant systems.
- RAUTHERMEX & RAUVITHERM (pre-insulated): flexible pre-insulated PE-Xa carrier pipes. Applications: buried heat distribution (heating/cooling).

*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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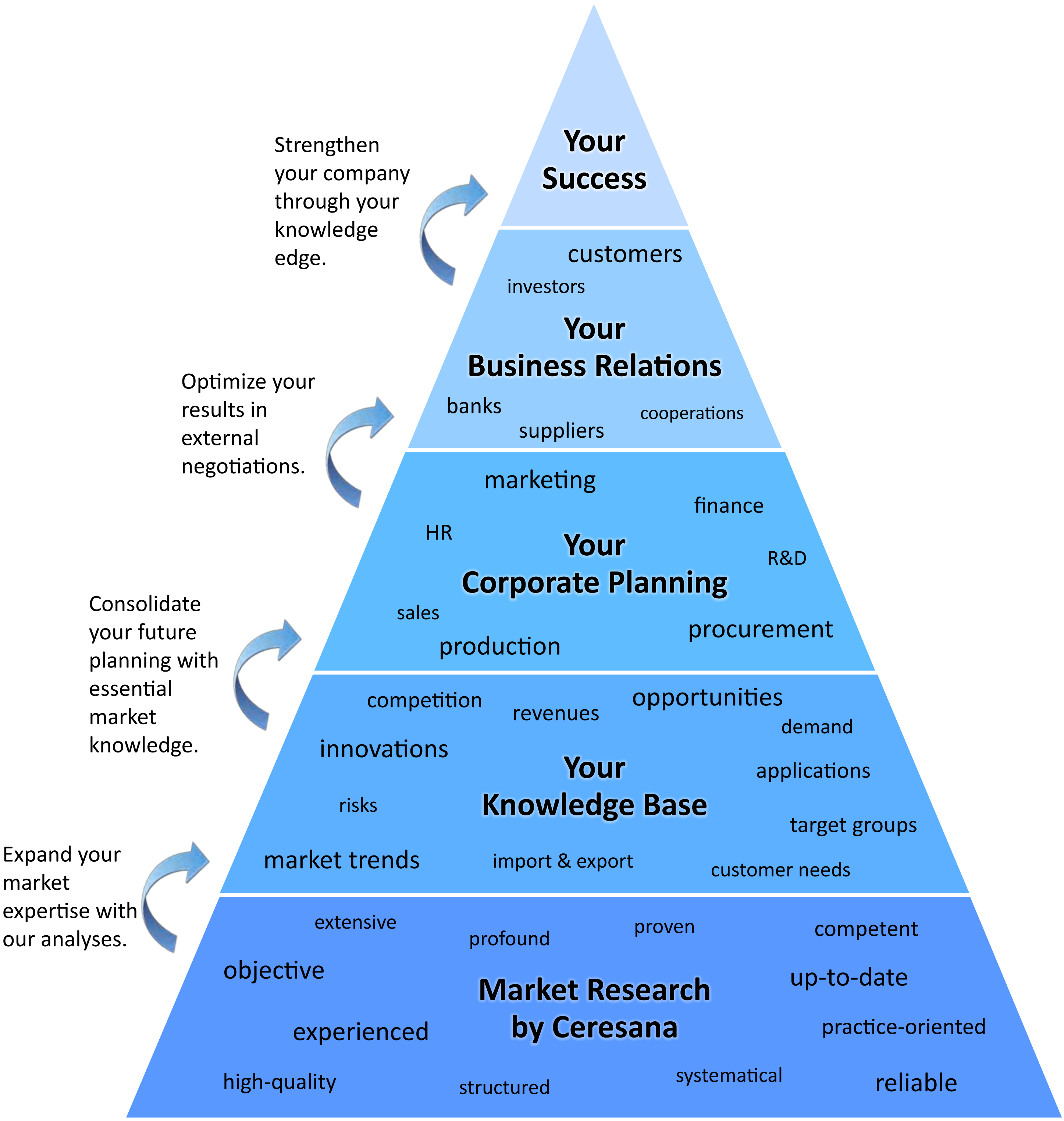

Our market studies provide you with the knowledge to...

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... forecast supply and demand

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Please do not hesitate to contact us if you have any questions.

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- Bioplastic Packaging – World
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Industry

- Adhesives – Europe / – World
- Insulation Material – Europe / – World
- Paints & Coatings – Europe / – World
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- Plastic Pipes – Europe / – World
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Chemicals

- Carbon Black – World
- Fillers – Europe / – World
- Flame Retardants – World
- Pigments – World
- Plastic Additives – World
- Plasticizers – World
- Solvents – World
- Stabilizers – World
- Surfactants – World
- Titanium Dioxide – World

Plastics

- Composites (CFRP & GFRP) – World
- Engineering Plastics – World
- Expandable Polystyrene – World
- Masterbatches – World
- Plastics – Europe / – World
- Polyethylene (LDPE) – World
- Polyethylene (LLDPE) – World
- Polypropylene – World
- Polyvinyl Chloride – World
- Silicones – World
- Synthetic Rubber – World
- Thermoplastic Elastomers – World

Packaging

- Bags, Sacks & Pouches – Europe / – World
- Corrugated Board & Solid Board – Europe
- Flexible Packaging – Europe
- Food Packaging – Europe
- Labels – Europe
- Plastic Caps & Closures – Europe / – World
- Plastic Films – Europe / – World

Mobility

- Automotive Coatings – World
- Automotive Plastics – Europe / – World
- Hybrid & Electric Cars – Europe