



# Strategic Growth Opportunities in Plastic Pipe Market

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DATE

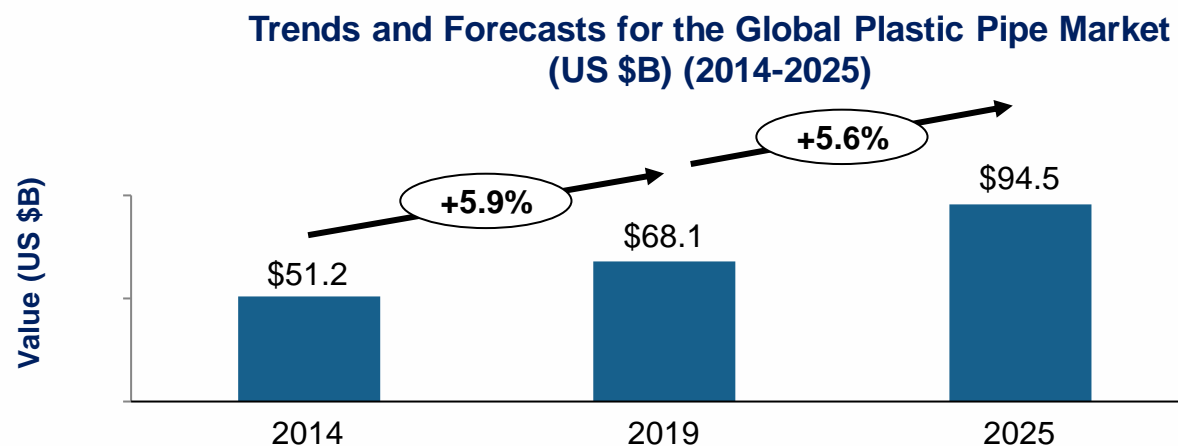
June, 2020

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Market Intelligence + Growth Consulting + Opportunity Screening + M&A Due Diligence + Benchmarking = **Your Company's Growth.**

[www.lucintel.com](http://www.lucintel.com)

## Future of Plastic Pipe Market Looks Promising. Global Market to reach \$94.5 Billion by 2025 with a CAGR of 5.6% from 2019-25



Source: Lucintel

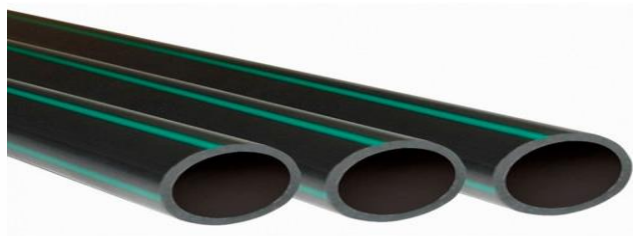
### Top Companies in Plastic Pipe Market

- Orbia
- China Lesso
- Advanced Drainage System
- Sekisui Chemical
- Solvay

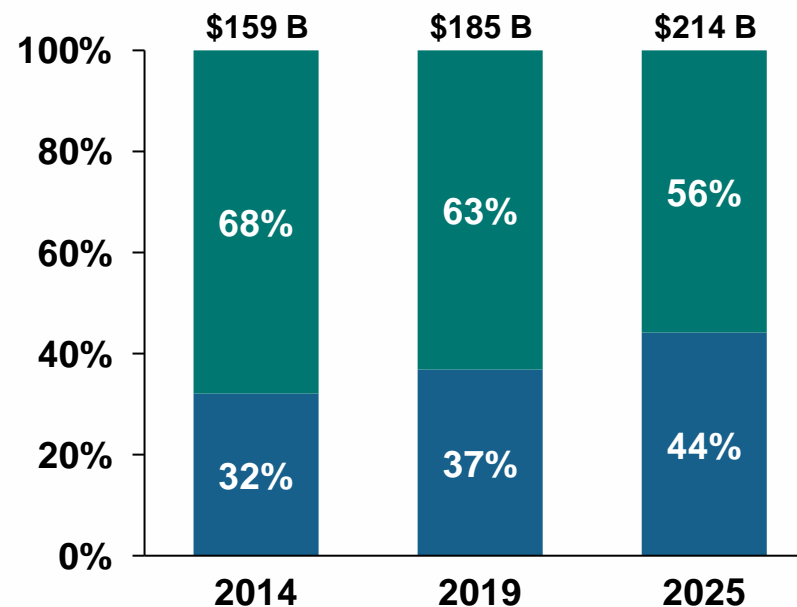
### Opportunities for Plastic Pipe by Various Material, Application, Diameter, Product Type, and End Use

| Material  | Application  | Diameter   | Product Type   | End Use  |
|---|--|--|--|--|
| <ul style="list-style-type: none"> <li>PVC Pipes</li> <li>PE Pipes</li> <li>PP Pipes</li> <li>Others</li> </ul> | <ul style="list-style-type: none"> <li>Wastewater</li> <li>Portable Water</li> <li>Chemical</li> <li>Electrical and Telecommunication</li> <li>Agriculture</li> <li>Oil and Gas</li> </ul> | <ul style="list-style-type: none"> <li>Large Diameter Pipes</li> <li>Small Diameter Pipes</li> </ul> | <ul style="list-style-type: none"> <li>Pipe</li> <li>Fittings and Accessories</li> </ul> | <ul style="list-style-type: none"> <li>Residential</li> <li>Commercial</li> <li>Industrial and Others</li> </ul> |

## In terms of Overall Opportunity, PVC Window represents ~37% in the Global Window Market



**Global Pipe Market: 2014-2025**



**CAGR (2019-2025)**

- Other Pipe Market ~0.4%
- Plastic Pipe Market ~5.6%

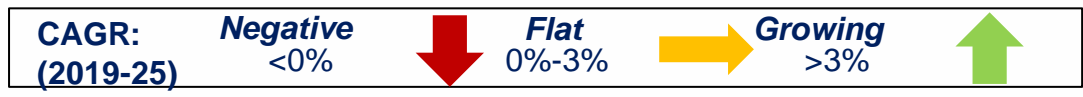
Source: Lucintel

# In This Market, Wastewater is the Largest Application of Plastic Pipe, Whereas PVC Pipes is Largest in Material Type

## Plastic Pipe Market by Application

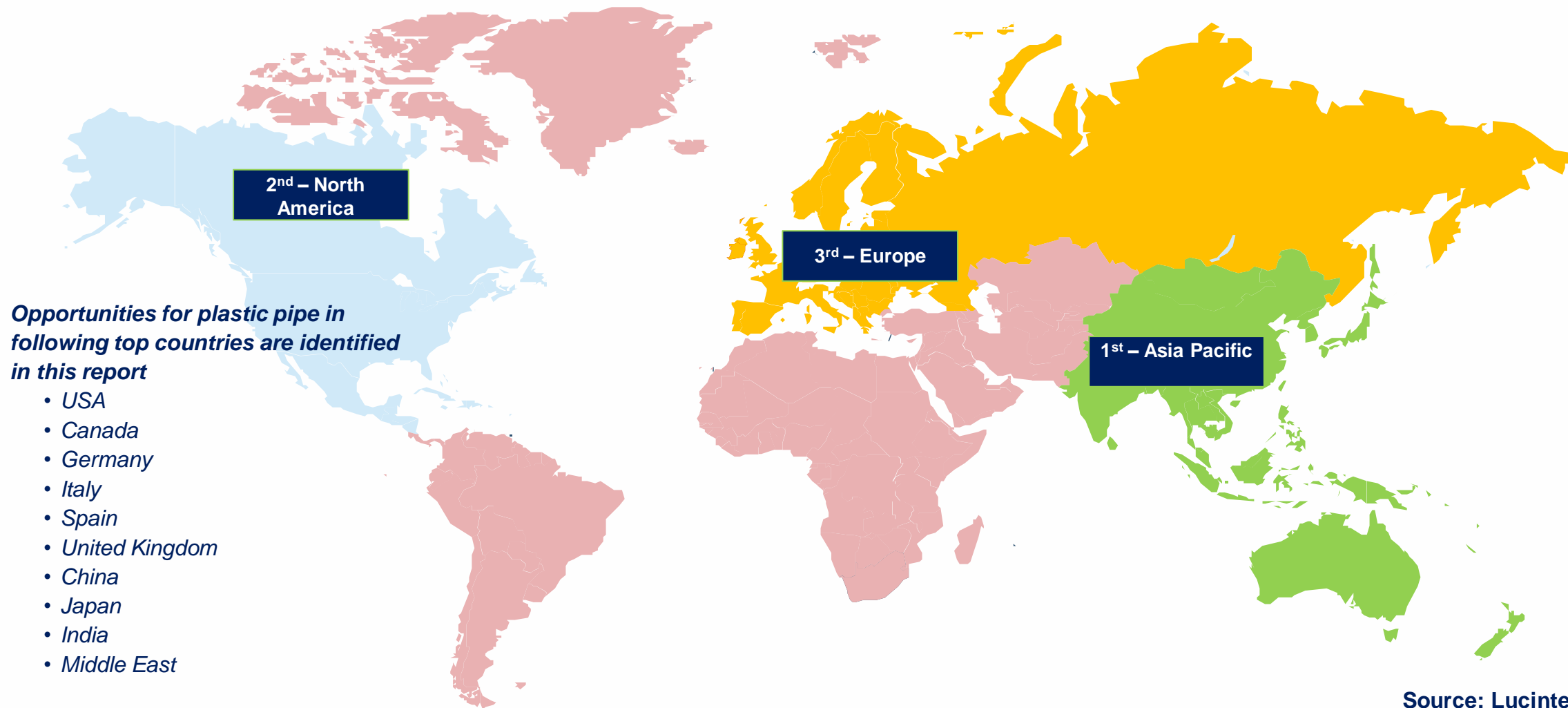


## Plastic Pipe Market by Material



Source: Lucintel

## In Terms of Regions, APAC Provides the Largest Opportunity for Plastic Pipe Followed by North America and Europe



Source: Lucintel

# Ecosystem of the Plastic Pipe Market is Composed of Diverse Group of Companies

## Raw Material Suppliers (PVC resin, colorants, additives, plasticizers, etc.)

DOW INEOS SOLVAY BASF We create chemistry

台塑關係企業 FORMOSA PLASTICS GROUP

## Plastic Pipe Manufacturers (PVC pipes, PE pipes, PP pipes, and others)

orbia SEKISUI LESSO SOLVAY JM Eagle DELIVERING GOOD WATER TO YOU

台塑關係企業 FORMOSA PLASTICS GROUP ADS Advanced Drainage Systems, Inc.

## Plastic Pipe Distributors (PVC pipes, PE pipes, PP pipes, and others)

HARRINGTON Industrial Plastics United Pipe & Steel Corp. The Industry Leader in Pipe Products Distribution

AQUA-FLO SUPPLY Landscape • Irrigation • Utilities EWING Irrigation & Landscape Supply

## End User (building construction, infrastructure, industrial, etc.)

REG 中国中铁 HOCHTIEF ExxonMobil Chemical

CCCC CHINA COMMUNICATIONS CONSTRUCTION COMPANY VINCI CONSTRUCTION

Source: Lucintel

## Growing Usage of Plastic Material over Competing Materials and Replacement of Aged Pipes are Major Drivers in This Market

### Key Drivers

**Increasing use of Plastic Material over Competing Materials :** The plastic pipe market is growing due to an increasing awareness of the properties, which include ease of install, corrosion free, and low price as compared to other traditional pipes

**Replacement of Aged Pipe :** The demand for replacement of metal pipes with plastic pipes is increasing due to corrosion, scaling, and other features of metal pipes; this is expected to drive the plastic pipe market

**Growth in Residential and Commercial Construction :** Increasing infrastructure development, and renovation in buildings escalate the demand for the overall construction industry, which will drive the demand for plastic pipe market

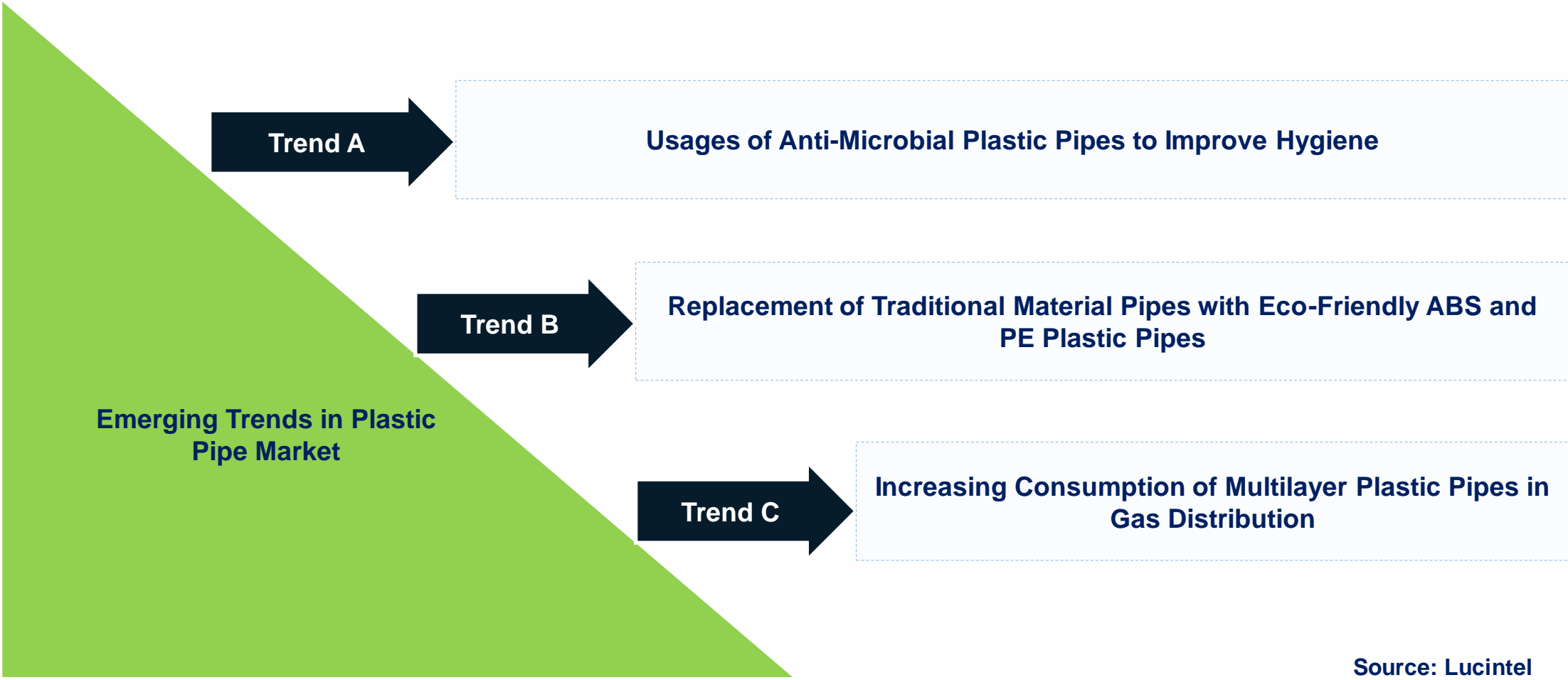
### Key Challenges

**Oil Price Volatility has Strong Impact on Plastic Pipe Market :** A rise in raw material prices increases the manufacturing cost of plastic pipes

**COVID-19 Impact:** Coronavirus (COVID-19) is having significant impact on businesses and the economy. Industry growth will witness negative impact in the year 2020 due to manufacturing lockdown, and labor shortage.

Source: Lucintel

# Usages of Anti-Microbial Plastic Pipes and Replacement of Traditional Material Pipes with Eco-friendly ABS and PE Plastic Pipes are Some of the Emerging Trends in the Plastic Pipe Market



Source: Lucintel



## Developing Capabilities in Multilayer Plastic Pipes and Anti-Microbial Plastic Pipes Provide Strategic Growth Paths

### Strategic Considerations in Plastic Pipe Market

#### Develop Capabilities

- Players of plastic pipe market can focus to increase their capabilities to fulfill multilayer plastic pipes requirements in gas distribution
- Increase in capabilities to match up with anti-microbial plastic pipes to improve hygiene
- Investments to increase competencies in advanced plastic pipes like eco-friendly PE and ABS pipes
- Research and development activities to develop low cost plastic pipes

#### Alliances / In-Organics Expansions

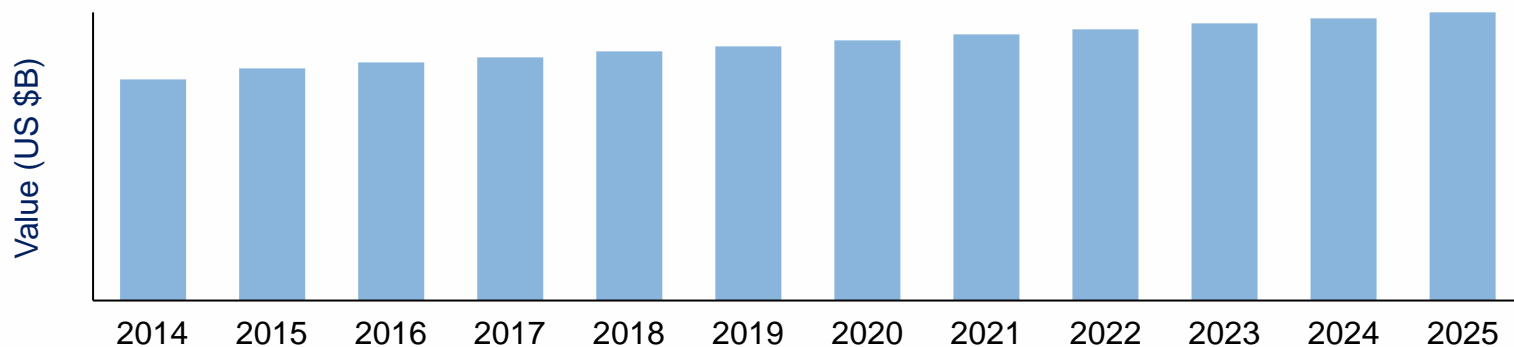
- Strategic collaborations / acquisitions to increase geographical presence in growing countries like China and India
- Develop alliance to penetrate in new applications
- Collaborative activities to develop advanced plastic pipe technologies

Source: Lucintel

# These Insights are Based on Below Market Report from Lucintel. It can help you Identify New Opportunities by Various Segments and Regions

[Click for detail: https://www.lucintel.com/cp/plastic-pipe-market-2020.aspx](https://www.lucintel.com/cp/plastic-pipe-market-2020.aspx)

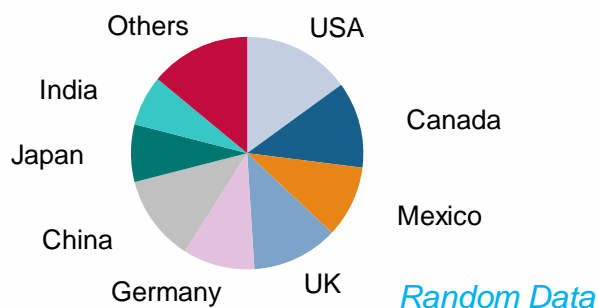
### Market Opportunity



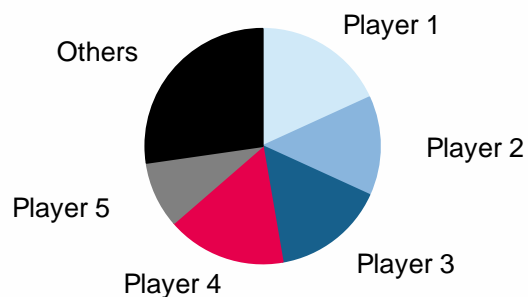
### Market Segment Analysis



### Regional Opportunity



### Market Share Analysis



### Other Coverage in Report

- *New Product Development*
- *Company Expansion*
- *Merger Acquisitions & JV*
- *Company Profiling*

**Note:** These insights are based on recently launched Lucintel's Report on plastic pipe Market, which has 150+ Page and over 100+ charts and tables. Lucintel also offers 10% free customization on above report based on your needs.

## Lucintel has an Extensive Toolkit to Address Strategic Questions



### Key Questions

- Is market space / opportunity of current product offerings sufficiently robust?
- Market is focus for many: how can my company profitably differentiate?
- Based on our core skills, where should we focus?
- Should we build or buy? Is build even an option?
- What game changer actions exist and/or is a more incremental approach best?
- What is the order sequence of market entry segments / products?

## Lucintel - At a Glance

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- Management comprised of PhDs, MBAs, and subject matter experts. Head quarter in Dallas, USA.

Conducted 500+ consulting projects across industries for 3M, Audi, Dupont, Carlyle, GE, etc.

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### Why Lucintel

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**Clients we serve:** Over 1000 clients from 70 countries – Fortune 500 companies

**Strategic advice:** Over 20 years of proven global strategic management consulting experience

### Industries Served



## Contact Us



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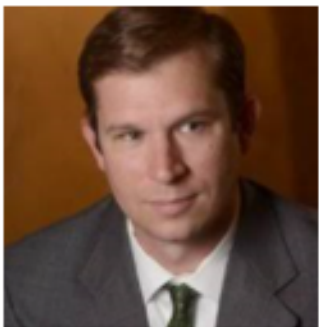
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