

Market Study - Chemical drain Fitting, Pipe Abwasserleitungen

World Market with focus on Europe

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Examples Drain Pipe Study

2.4 Description of importante branches and applications

Chemical Process Industry

In the chemical process industry, it concerns mainly the carrier of corrosive media as well as acids and lyes in liquid solutions also with abrasive components. Beside it manifold uses in the water processing and the auxiliary circulation for piping systems.

Beside the divers distribution pipes the process field in the chemistry has a big importance for plastic piping components. The important subsegments are Chemical distribution and Chemical production. Important applications are: Air cleaning, Batching, fitting stations, tanks, flue gas desulphurisation, dilutions, dosing, neutraliations, water injections, water treatment

The targeted modification of the properties of materials and substances by chemical processes, in order to obtain pre-defined functions. This includes neutralization, water treatment, filling stations, etc. Tanks, sewage treatment dosage, air and flue gas cleaning, neutralization, dilution, water injections and utility systems for piping systems. Chemical trade, chemicals distribution, surface treatment, power plants, chemical production

-> Sewage and water treatment

Besides the various supply lines of the process in the field of chemistry is of great importance for plastic - components.

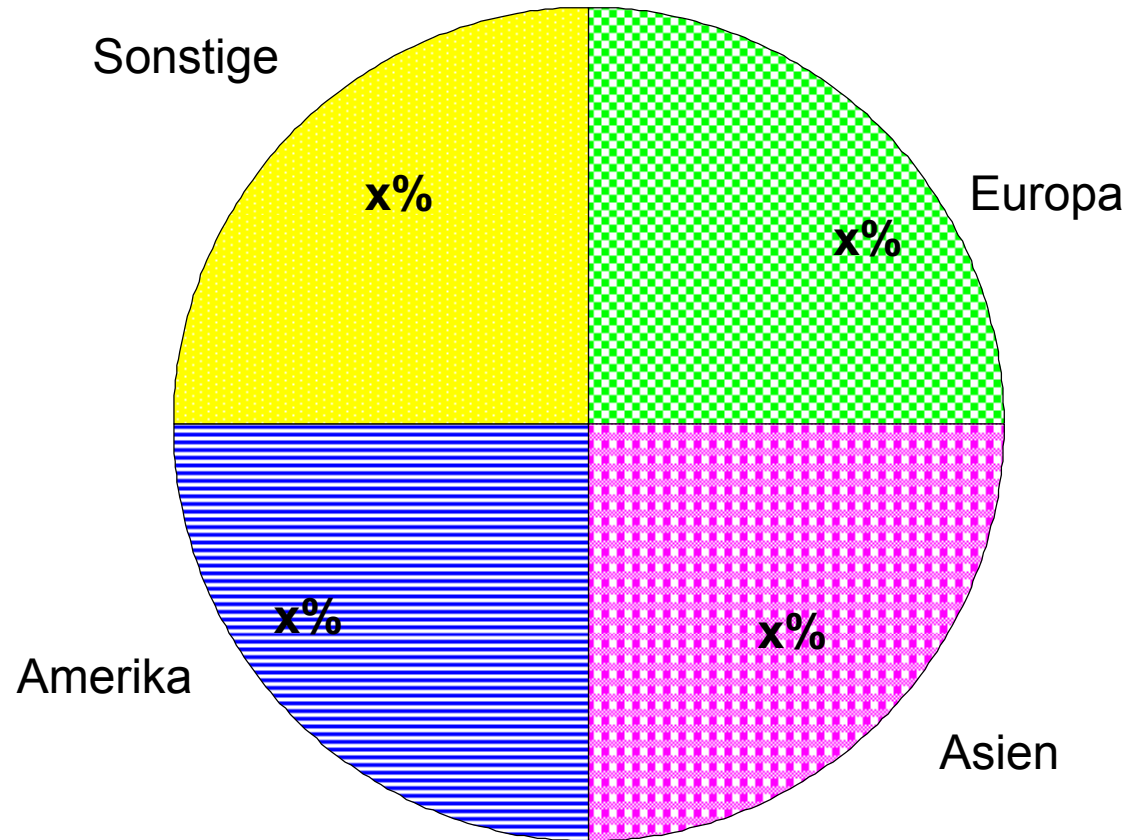
Chances and Challenges for the European Chemical Industry (After CHEManager)

Decreasing Market Share

In a demonstration of its inherent resilience, the European chemicals sector registered a solid recovery in 2010 after the 2009 economic crisis. Chemicals sales of the EU-27 countries in 2010 reached €491 billion after €420 billion in 2009, according to Cefic, the European Chemical Industry Council (Fig. 1). The rest of Europe (Switzerland, Norway and other Central & Eastern Europe countries) added another €87 billion in 2010. For 2011, no official sales numbers are available yet, but given the confirmed production growth of 1.1 % and price increases for most chemicals, it is likely that EU chemicals sales have jumped over the €500 billion mark again.

3. Market volume Chem. Drain Pipe. main regions World

Market Volume 2011 - x Mio €



3.1 World market Building Technology Waste water 2011 in Mio € **Model**

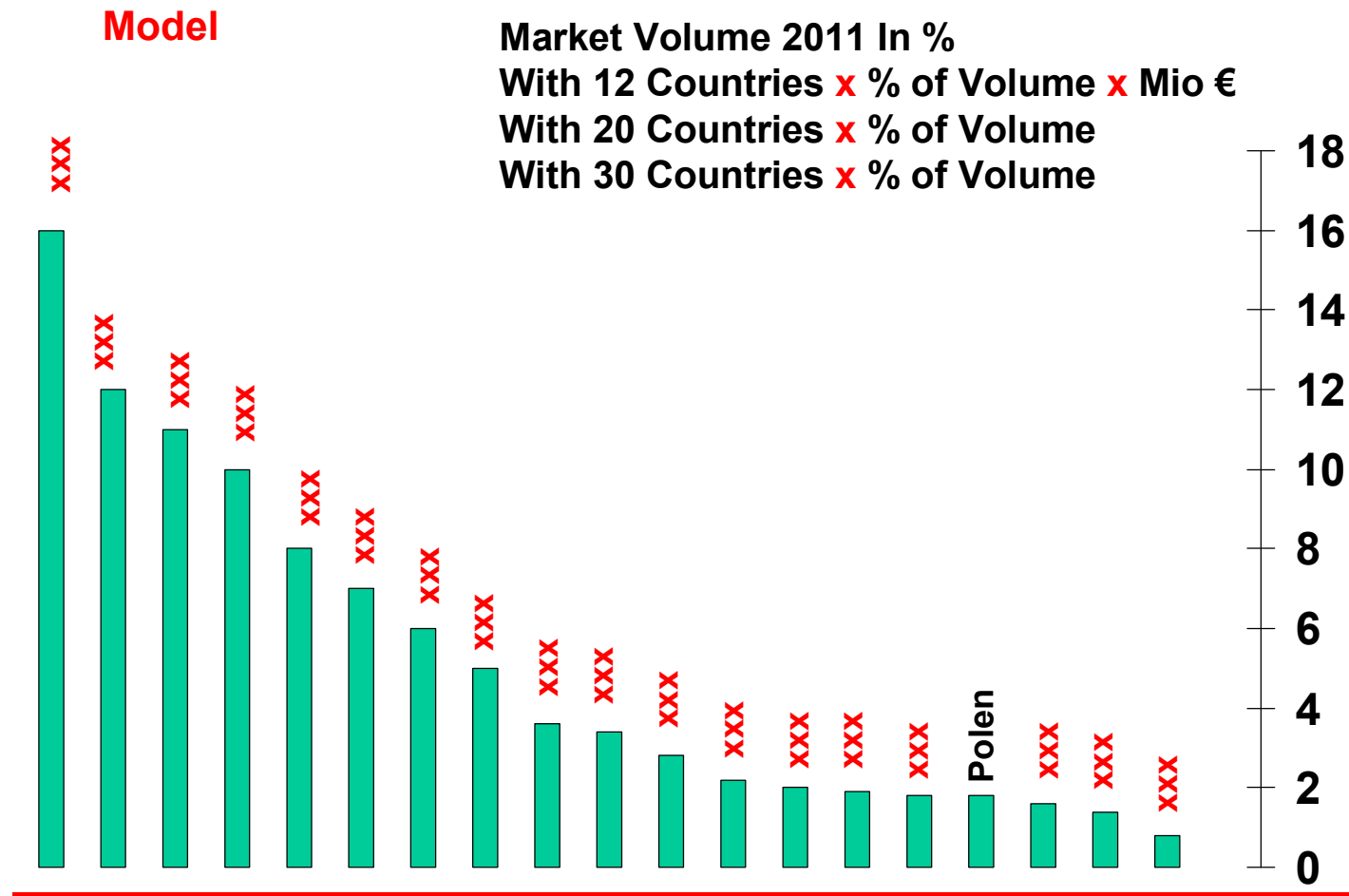
Regions	D	Europe	America	Asia	Others	World
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Population						
in Mio	82	740	940	4220	1100	7000
in %	1,2	10,6	13,4	60,3	15,7	100,0

Segments						
Construction market 2009 in %	x	x	x	x	x	x
Sanitary 2009 in %	x	x	x	x	x	x
Industry, utility 2010 in %	x	x	x	x	x	x
Waste water systems in buildings in %	x	x	x	x	x	x
Chemical drain fittings, pipes in buildings 2011 in Mio €	x	x	x	x	x	x

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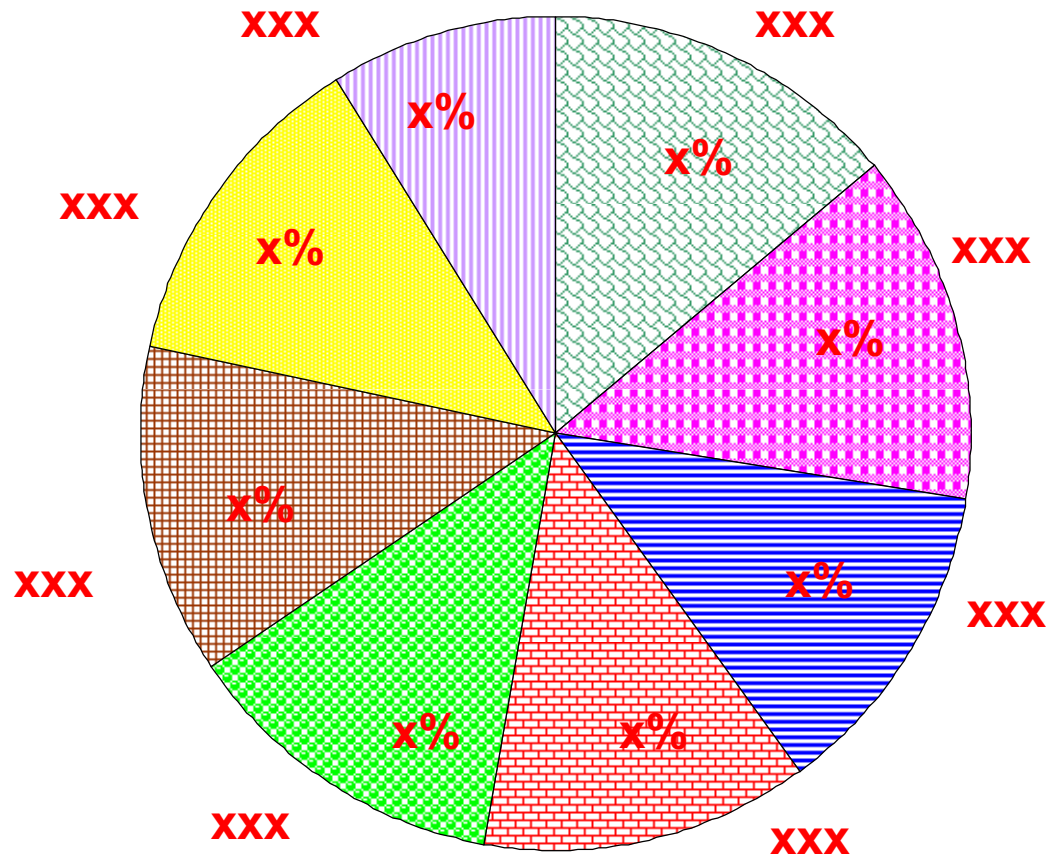
3.2 Market volume Chem. Drain pipes World country- ranking



3.3 Market volume Chem. Waste water pipes Europe - countries

Market Volume Europe 2011 x Mio €

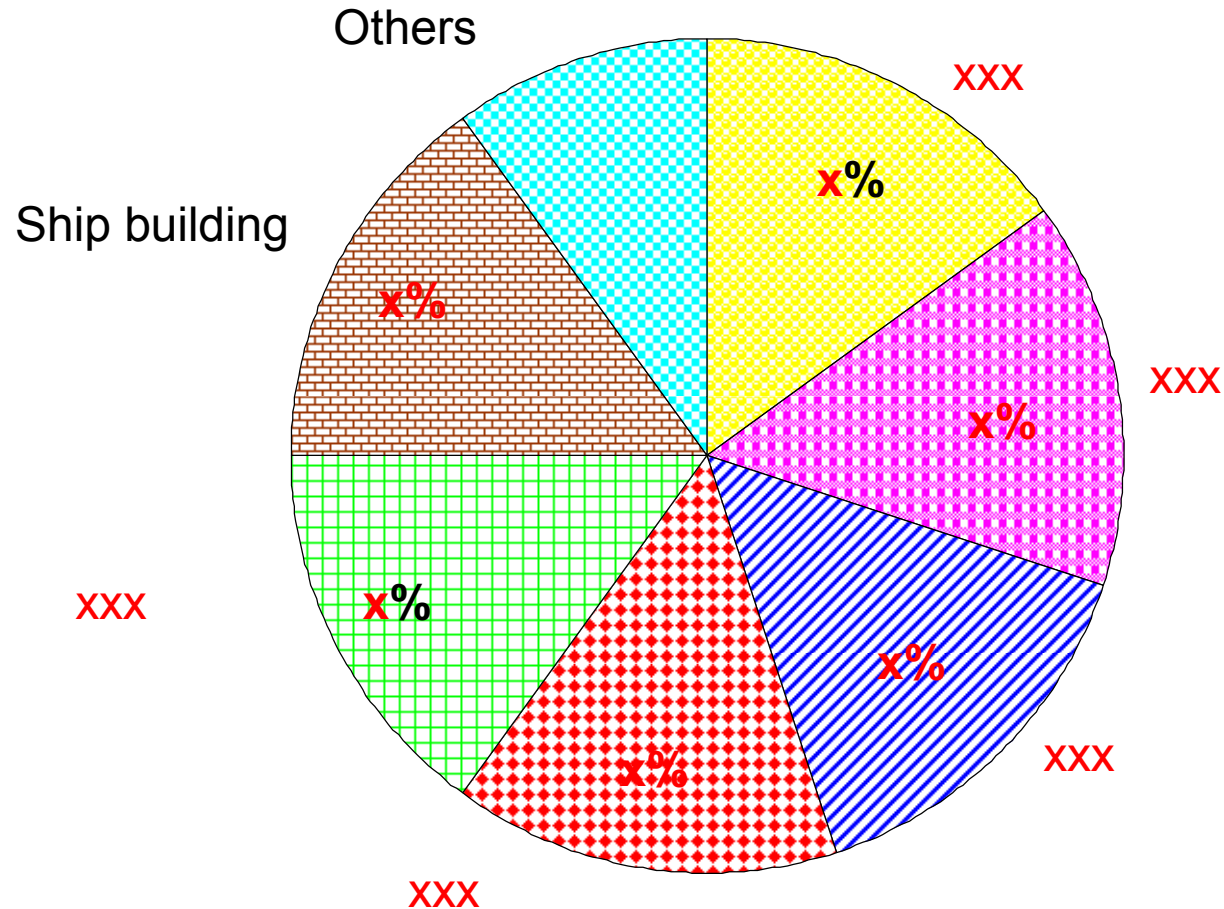
Model



3.4 Market volume Chem. Drain fitting, pipe World after importante branches

Model

Market Volume World 2011 = **x** Mio €

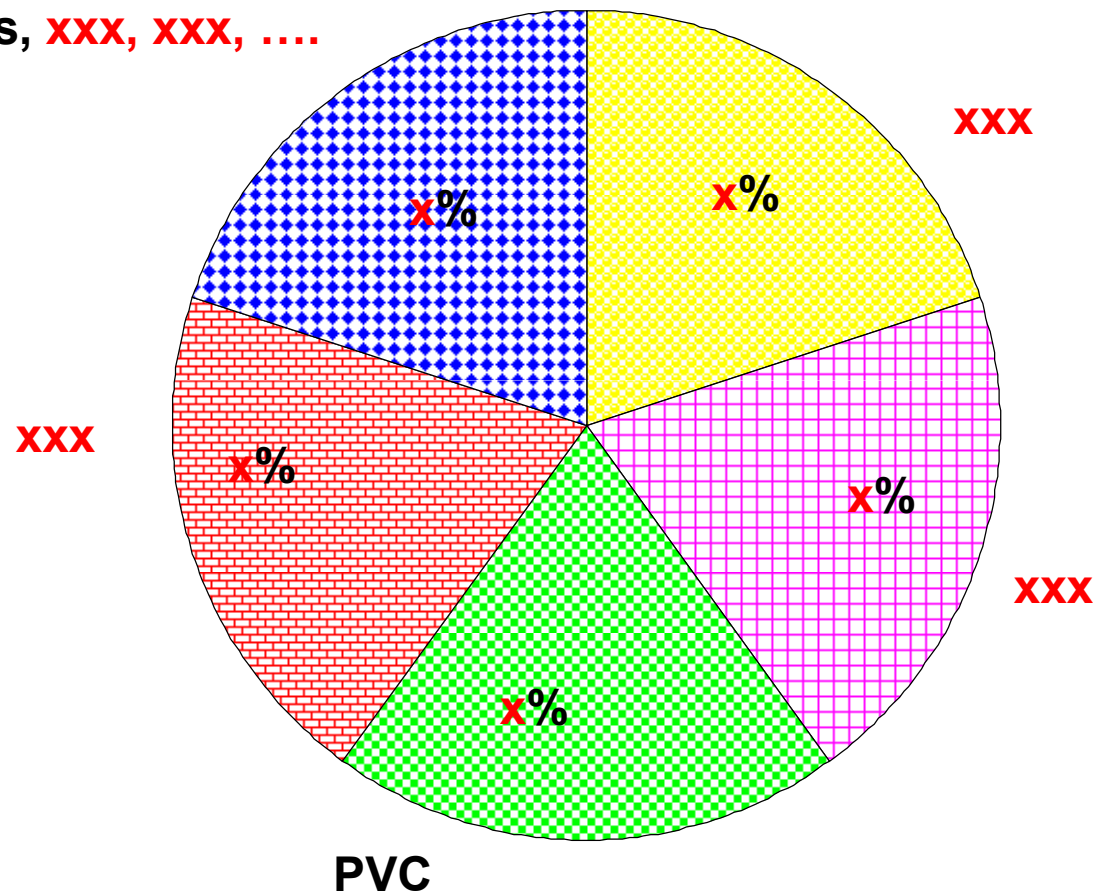


3.7 Market volume Chemical Drain Fitting, Pipe Europe after material groups

Model

Market Volume Europe 2011 = **x** Mio €

Others, **xxx**, **xxx**,



4. Using sectors, examples of applications, references

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Applications Durapipe

Vulcathene specialist chemical drainage pipework has been installed in a leading clinic on London's Harley Street.



The hospital which is situated within London's famous medical community in Marylebone, features an extensive Vulcathene pipework system, which carries pathology waste – the by-product of laboratory and surgical procedures – from its research laboratories.

Mansell, the installers of the pipework, were working with Vulcathene products for the first time. Peter Needham, Project Manager, Mansell, said: "Vulcathene was far easier to install than we expected - it was much lighter than the steel pipes we are used to working with and the jointing procedure was also quick and simple. The technical assistance we had from Durapipe UK was also excellent, I would not hesitate in specifying the Vulcathene system for our future projects."

Vulcathene has excellent corrosion resistant properties and is specially designed for the safe conveyance of chemicals. It meets the highest international standards and has been installed in laboratories across the world for over 50 years. Vulcathene pipework has two different jointing methods, allowing it to be jointed mechanically for

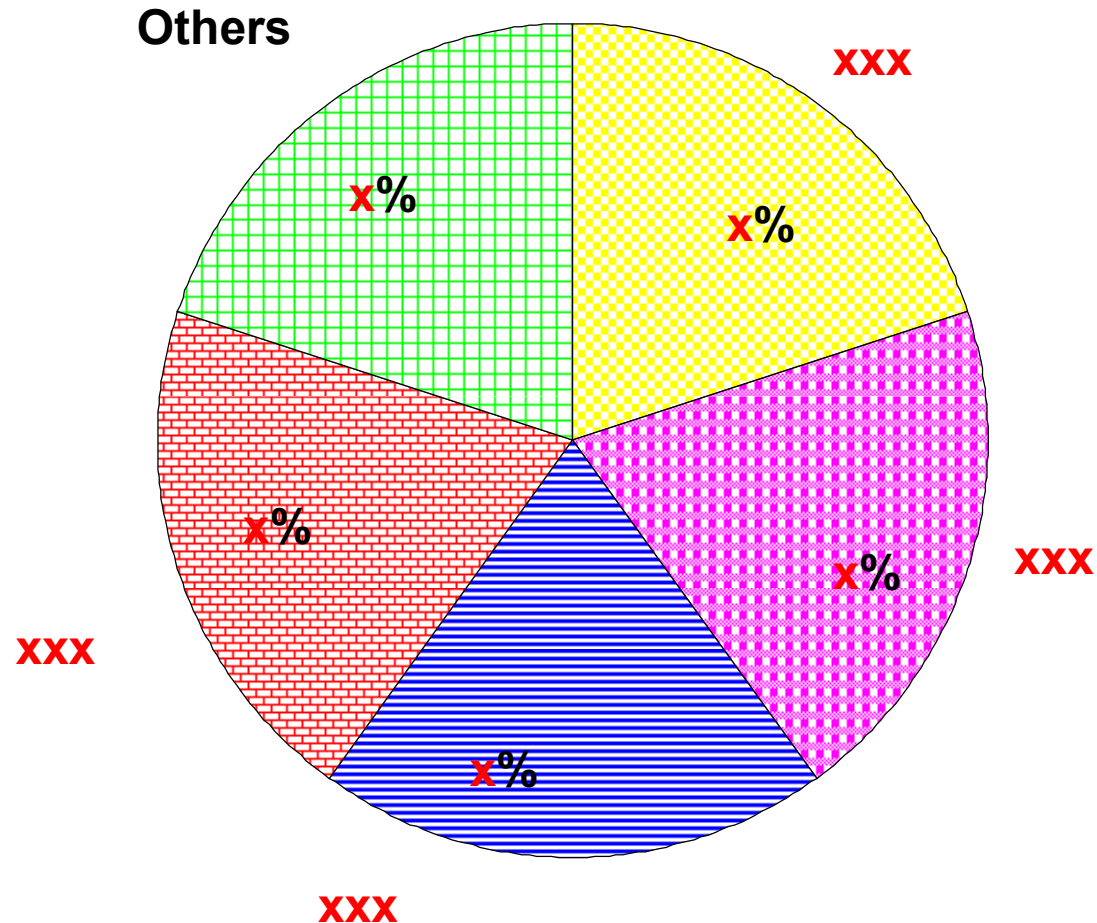
5. Competitors Drain Pipes, Fittings, Materials, employees, Turnover G Total 2011, A Drain in Mio €

	Name Firm (Group) Name Firma (Konzern)	Count Land	Material pipes Rohre	Werkstoff	Material Fittings Werkstoff Fittinge	Employees Mitarbeiter	Turnover Umsatz G Mio€	Umsatz A Mio €	WWW
1	xxx		ES,GE		ES	3800	620	110	www.xxx.xxx
2	Advanced Dranage Syst.	USA	PE, PP		PE, PP	xxx	xxx		www.xxx.xxx
3	xxx		PE,PP		PE,PP	250	100		
4	xxx		PE,PP,PVC		PE,PP,PVC	100	20		
5	Aliaxis	B	PE,PP,PVC,ABS,CPVC,SD		PE,PP,PVC,ABS,CPVC	14558	2235	827	www.xxx.xxx
6	xxx	D, FR	PVC, PP		PVC, PP	183	45		www.xxx.xxx
7	xxx	xx	GFUP		RV	240	39		www.xxx.xxx
8	xxx	India	PVC		PVC				www.xxx.xxx
9	xxx	xx	PP		PP	400	60		
10	Arkema	FR	PP,PVC		PVC,RV	xxx	xxx		www.xxx.xxx
11	xxx	Ukr	PVC						
12	xxx	xx			PE,PVC	100	20		
13	xxx	xx	ES		ES				
14	xxx	D	PE,PP		PE	70	12		www.xxx.xxx
15	xxx	D	PVC		PVC	300	50		
16	xxx		PB,		PB				
17	xxx	xx	PE,PP,PVC,GFUP,ES,SD		PE,PP,PVC,RV,ES				
18	xxx	xx	GFUP		GFUP				
19	xxx	USA	PE						www.xxx.xxx
20	Blücher	D	ES,GE		ES	xxx	xxx		www.xxx.xxx
21	xxx	xx	PP, PVC		PVC	47	11		www.xxx.xxx
22	xxx	Pol	PVC						
23	xxx	D	GE			500	200		www.xxx.xxx
24	xxx	xx	ES		ES				www.xxx.xxx
25	xxx	xx	PVC						
26	xxx				Nylon				
27	xxx	USA	GE, PVC, ABS, CPVC		GE, PVC, ABS, CPVC	1500	170		www.xxx.xxx
28	xxx	xx	PP		PP,PVC				www.xxx.xxx
29	xxx	I	PP		PP	150	30		www.xxx.xxx

5.1 Competitors drain pipes buildings in UK

Market Volume **x** Mio €

Model



6.1 Cost proportions Buildings - Drain/Sanitary/Heating - Praxis examples

	Gebäudeart	Sanitary - cold- and warm water	Waste water drain	Heating	Total
	1 Family house	xx-xx %	xx-xx %	xx-xx %	100%
	3 Families house	xx-xx %	xx-xx %	xx-xx %	100%
	4 Families house	xx-xx %	xx-xx %	xx-xx %	100%
	Hochhaus 3 floors (10WE)	xx-xx %	xx-xx %	xx-xx %	100%
	Hochhaus 4 floors (16WE)	xx-xx %	xx-xx %	xx-xx %	100%
	Hochhaus 6 floors (20WE)	xx-xx %	xx-xx %	xx-xx %	100%
	Hospital 400-500 beds	xx-xx %	xx-xx %	xx-xx %	100%