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THE EUROPEAN PLASTIC PIPE MARKET 2003

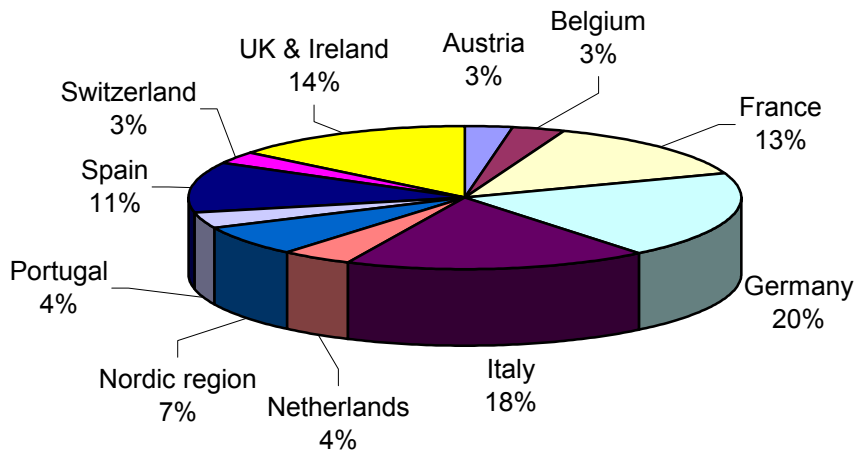
IAL Consultants is pleased to announce the publication of the fourth edition of its report, *The European Plastic Pipe Market*. Focusing only on Western Europe, the total market for plastic pipes in the 15 main countries in the region amounted to almost 2.5 million tonnes or € 2.1 billion in 2002.

The 15 Western European countries covered by the report are:

- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Ireland
- Italy
- Netherlands
- Norway
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

Germany and Italy are the two largest national markets, and taken together with the UK and Ireland, account for just over half of the market at 52%:

European Market for Plastic Pipes by Country (2002)



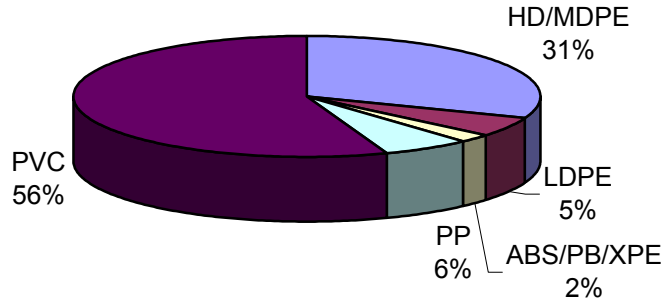
Source: IAL Consultants

The report covers pipes based on the following polymer resins:

- Polyethylene (PE): HDPE/MDPE, XPE, LDPE
- Polypropylene (PP)
- Polybutylene
- ABS
- PVC

PVC dominates the plastics used in Western European piping at some 56% with the main PE types accounting for another 36% of the market:

European Market for Plastic Pipes by Polymer Type (2002)



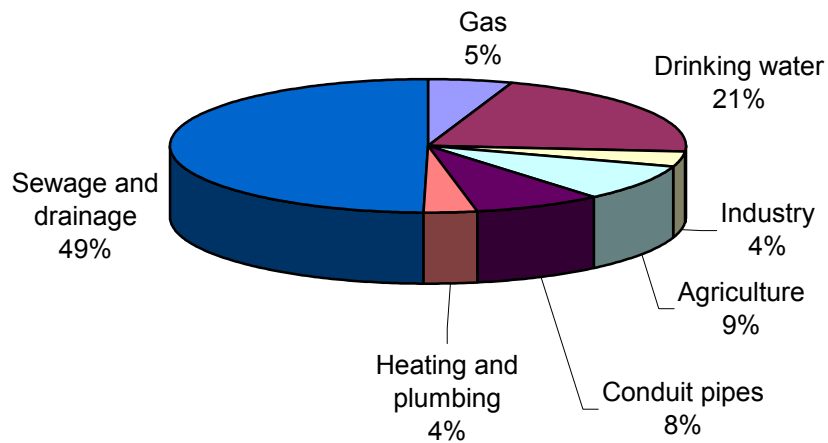
Source: IAL Consultants

Coverage according to end-use applications is as follows:

- Gas
- Drinking water
- Industry/agriculture
- Conduit
- Heating and plumbing
- Sewage, drainage and guttering

In application terms, almost half of the market – some 49% - is occupied by sewage and drainage applications with drinking water being the second largest sector at 21%:

European Market for Plastic Pipes by Application (2002)



Source: IAL Consultants

Selected findings from the report include:

- The market is fairly mature and likely to grow at between 1-3% pa over the next five years.
- Plastic pipes will continue to progress in terms of overall market share since their performance and corrosion-resistance is superior to that of concrete and steel. Cross-linked PE (XPE) pipes are making inroads into industrial applications, where they can compete with steel in terms of performance (eg temperature resistance) characteristics.
- Conduit pipes is an area of strong growth owing to the expansion of the telecommunications industry
- Recycling and environmental issues are gaining in importance with regard to the industry. Across Scandinavia, the Netherlands, Austria and Germany there are many initiatives in place and large amounts of plastic piping are being recycled.

The contents of the report are as follows:

1. Introduction
2. European Summary
3. Market Review by Country
4. Market Trends & Influences
5. Resin Suppliers & Pipe Manufacturers
6. Directory of Suppliers
7. Sources of Information

The European Plastic Pipe Market 2003 (115 pp and 58 tables) costs \$1,500 and may be bought in sections at our website www.ialconsultants.com

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