

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Underground pipes are used for a variety of end uses, and demand is therefore a factor of the investment decisions or economic performance of these end-use markets. Influences on end-use markets are varied and not always dependent on the growth of the wider economy, so market fluctuations rarely follow economic activity." - Terry Leggett, Senior Analyst

This report looks at the following areas:

- Is the market for underground pipes mature, and therefore a commodity market?
- Has the plastic substitution trend changed the industry structure?
- Why has plastic penetrated the market so strongly?

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

Figure 1: Development of the UK market for underground pipes, 2010-14 actual and 2015-19 forecast

- Figure 2: Segmentation of the UK market for underground pipes, by material, 2010-14
- Figure 3: Segmentation of the UK market for underground pipes, by end use sector, 2014

Market factors

Figure 4: New construction activity, 2009-14 actual and 2015-19 forecast

Figure 5: Civil engineering activity, 2009-14 actual and 2015-19 forecast

Figure 6: UK capital expenditure on water and sewerage services, 2009/10-2014/15

Figure 7: Total gas distribution capital expenditure, 2009/10-2013/14

Figure 8: Road construction activity, 2010-14 actual and 2015-19 forecast

Companies

Figure 9: Changes in the structure of the plastic plates, sheets, tubes and profiles industry, 2011-15

What we think

Key Issues

Is the market for underground pipes mature, and therefore a commodity market?

Has the plastic substitution trend changed the industry structure?

Why has plastic penetrated the market so strongly?

Introduction

Definitions

Methodology

Abbreviations

Market positioning

Market factors

UK Economy

Overview

Figure 10: UK GDP quarterly development, 2003-15

Figure 11: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

Consumer spending

Manufacturing

Figure 12: UK output by industry, 2008-15

Business investment

Figure 13: UK GFCF 2003-15

BUY THIS REPORT NOW



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Imports

Exports

Market Size and Trends

Key analysis

Market size

Figure 14: UK market for underground pipes, 2010-14

Market segmentation

Overview

Figure 15: Segmentation of the UK market for underground pipes, by material, 2010-14

Figure 16: Segmentation of the UK market for underground pipes, by end use application, 2010-14

Plastic

Figure 17: UK market for plastic tubes and pipes, 2010-14

Figure 18: UK market of plastic tubes and pipes, by type, 2010-14

Figure 19: UK market for underground plastic pipes, by end use, 2010-14

Ductile Iron

Figure 20: UK market for iron tubes and pipes, 2010-14

Clay

Figure 21: UK market for clay tubes and pipes, 2010-14

Concrete

Figure 22: UK market for concrete tubes and pipes, 2010-14

Regional analysis

Figure 23: Regional value of total new construction output, 2010-14

Figure 24: Analysis of civil engineering output, by region, 2010-14

Figure 25: Analysis of water related capital expenditure, by water and sewerage companies in England and Wales, 2008/09-2013/14

Figure 26: Analysis of sewerage-related capital expenditure in England and Wales, by company, 2008/09-2013/14

Figure 27: Analysis of Scottish Water capital expenditure on water and sewerage services, 2009/10-2013/14

Figure 28: Progress of Scottish Water to date in the five year investment programme 2010/15

Figure 29: Analysis of Northern Ireland Water capital expenditure on water and sewerage services, 2009/10-2013/14

Market trends

Supply Sources

Key analysis

Production

Overview

Figure 30: UK production of pipes in materials used for underground applications, 2010-14

Segmentation

Figure 31: Segmentation of the UK production of pipes in materials used for underground applications, by material, 2010-14

Plastic

Figure 32: UK production of plastic tubes and pipes, by type, 2010-14

Ductile Iron

BUY THIS REPORT NOW



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 33: UK production of iron tubes and pipes, 2010-14

Clay

Figure 34: UK production of clay tubes and pipes, 2010-14

Concrete

Figure 35: UK production of concrete tubes and pipes, 2010-14

Imports

Overview

Figure 36: UK imports of pipes in materials used for underground applications, 2010-14

Segmentation

Figure 37: Segmentation of the UK imports of pipes in materials used for underground applications, by material, 2010-14

Plastic

Figure 38: UK imports of plastic tubes and pipes, by type, 2010-14

Ductile Iron

Figure 39: UK imports of ductile iron tubes and pipes, by type, 2010-14

Clay

Figure 40: UK imports of clay tubes and pipes, 2010-14

Concrete

Figure 41: UK imports of concrete tubes and pipes, by type, 2010-14

Exports

Overview

Figure 42: UK exports of pipes in materials used for underground applications, 2010-14

Segmentation

Figure 43: Segmentation of the UK exports of pipes in materials used for underground applications, by material, 2010-14

Plastic

Figure 44: UK exports of plastic tubes and pipes, by type, 2010-14

Ductile Iron

Figure 45: UK exports of iron tubes and pipes, by type, 2010-14

Clay

Figure 46: UK exports of clay tubes and pipes, 2010-14

Concrete

Figure 47: UK exports of concrete tubes and pipes, 2010-14

Industry Structure

Key analysis

Industry development

Figure 48: Analysis of the changes in the structure of the plastic plates, sheets, tubes and profiles industry, 2011-15

Structure by employment

Figure 49: Analysis of the employment structure of the plastic plates, sheets, tubes and profiles industry, 2014-15

Structure by turnover

Figure 50: Analysis of the financial structure of the plastic plates, sheets, tubes and profiles industry, 2014-15

BUY THIS REPORT NOW



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company profiles

Naylor Drainage

Figure 51: Financial analysis of Naylor Drainage, 2011-15

Company strategy

Polypipe

Figure 52: Financial analysis of Polypipe, 2010-14

Company strategy

Saint Gobain PAM UK

Figure 53: Financial analysis of Saint-Gobain PAM UK, 2010-14

Company strategy

Radius Systems/Polymerteplo Group

Figure 54: Financial analysis of Radius Systems, 2009-14

Company strategy

Wavin

Figure 55: Financial analysis of Wavin, 2010-14

Company strategy

Demand Structure

Key analysis

Construction

Figure 56: Construction output in Great Britain, by type, 201014 Figure 57: Forecast construction output in Great Britain, 2015-19 Figure 58: Forecast construction output in Great Britain, 2015-19

Civil engineering

Figure 59: Civil engineering construction output in Great Britain, by sector, 2010-14

Figure 60: Forecast civil engineering construction output in Great Britain, 2015-19

Water supply

Figure 61: Total capital expenditure by water and sewerage companies in England & Wales, 2005-10 and 2010-15

- Figure 62: Total capital expenditure by water-only companies in England & Wales, 2005-2010 and 2010-2015
- Figure 63: Actual UK capital expenditure on water and sewerage services, 2009/10-2014/15
- Figure 64: UK capital expenditure on water and sewerage services, 2009/10-2014/15
- Figure 65: Sewers renovated and replaced in England and Wales, by company, 2009/10-2013/14

Water civil engineering construction output

Figure 66: Civil engineering construction output for the potable water industry in Great Britain, 2010-14

Sewerage civil engineering construction output

Figure 67: Civil engineering construction output for the sewerage industry in Great Britain, 2010-14

The gas sector

Figure 68: Total gas transmission and distribution capital expenditure, 2009/10-2013/14

BUY THIS REPORT NOW



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 69: Total gas transmission capital expenditure, 2009/10-13/14

Figure 70: Total gas distribution capital expenditure, 2009/10-2013/14

Replacement expenditure

Figure 71: Length of gas mains replaced, by distribution network operator, 2009-13

Civil engineering construction output

Figure 72: Civil Engineering Construction Output for the Gas Industry in Great Britain, 2010-14

Forecast

Key analysis

Market size

Figure 73: Forecast UK market for underground pipes, 2015-19

Market segmentation

Figure 74: Forecast segmentation of the UK market for underground pipes, by material, 2015-19

Figure 75: Forecast segmentation of the UK market for underground pipes, by end use application, 2015-19

Production

Imports

Industry

Further Sources and Contacts

Trade associations Association of Drainage Authorities British Plastics Federation Clay Pipe Development Association Concrete Pipeline Systems Association International Society for Trenchless Technology Plastic Pipe Manufacturers' Society Trade magazines Cast Metal & Diecasting Times(Quarterly) Construction News (Weekly)

New Civil Engineer (Weekly)

Tube & Pipe Technology (Alt Months)

Trade exhibitions

INTERBUILD

Plastic Design & Moulding

BUY THIS REPORT NOW