China Plastic Pipe Industry Report, 2014-2017

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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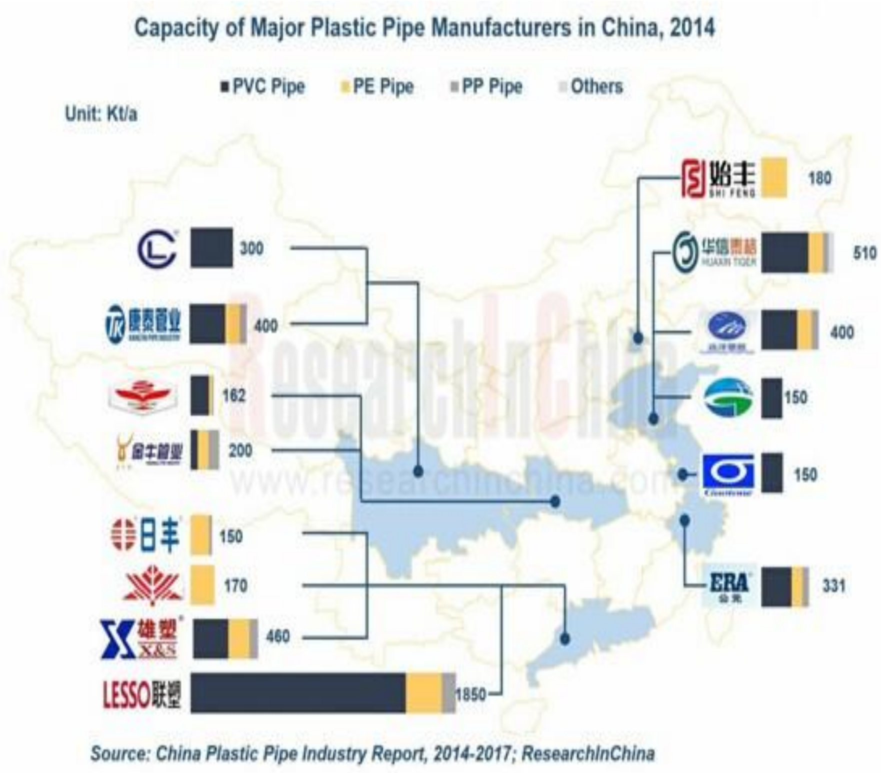
Abstract

China has become the world's largest producer and consumer of plastic pipes. In 2013, China’s plastic pipe output and demand reached 12.1 million tons and 11.117 million tons respectively, representing the respective year-on-year increase of 10.0% and 7.1%. The output of PVC pipes is higher than that of other plastic pipe varieties in China, followed by the output of PE pipes and PP pipes. In 2013, China’s PVC pipe output hit 6.59 million tons, accounting for 54.5% of China’s total plastic pipe output, while the output of PE pipes and PP pipes shared 40.5% together.

Municipal water supply and drainage, building water supply and drainage and other fields act as the downstream of China plastic pipe industry. In 2013, the downstream demand accounted for 69.8% of China's total demand for plastic pipes together. Propelled by the construction of Chinese municipal underground pipe network and drinking water facilities, the share of the downstream demand is expected to rise to 75.4% in 2017.

Currently, numerous Chinese plastic pipe enterprises are small-sized. 300 companies achieve the annual capacity of more than 10,000 tons each, while only about 15 enterprises have the annual capacity of 200,000 tons or more. To improve competitiveness and market share, China Lesso, Yonggao, Weixing New Building Materials, Cangzhou Mingzhu, Newchoice Pipe Technology, Goody Science & Technology and Shandong Huaxin Plastic Pipe have expanded capacity in a successive way.



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China Lesso is China's largest manufacturer of plastic pipes. By the end of 2013, the company had set up 18 production bases in Guangdong, Guizhou, Sichuan, Hubei and other places, with the annual capacity of 1.8 million tons. In 2014, the company established new production bases in Hainan, Yunnan and Shandong. The additional plastic pipe capacity of 50,000 tons is expected to be realized at the end of 2014.

Yonggao is one of major producers of plastic pipes in China. As of the end of 2013, the company had been able to produce 231,000 tons of plastic pipes each year. The company is building an 80,000 tons/a plastic pipe project in Huangyan and a 50,000 tons/a plastic pipe project in Tianjin, both of which are expected to go into operation at the end of 2014. In 2011-2013, the company acquired Anhui Guangde Jinpeng Science and Technology Development Co., Ltd., Guangde Jiahe New Materials Co., Ltd and other companies to constantly improve its industrial chain layout.

Newchoice Pipe Technology is one of key HDPE reinforced winding pipe and related fitting enterprises in China, with the main products DN600-DN1400 series. In June 2013, the company began a 4,800 tons/a HDPE reinforced winding pipe project in Jiangsu, which is expected to go into production before the end of 2014. Besides, the company will start building a 4,800 tons/a HDPE reinforced winding pipe project in Sichuan in the second half of 2014. Once these two projects are put into production, the company's annual capacity of HDPE reinforced winding pipes will hit 35,100 tons.

The report focuses on the followings:

- Supply & demand, import & export, product mix, regional structure, competitive landscape, price, etc of China plastic pipe industry;
- Supply & demand, import & export, competition pattern and development trends of Chinese plastic pipe market segments (PVC pipe, PE pipe and PP pipe);
- Development, demand for downstream plastic pipes and development trends of China plastic pipe downstream industries (municipal drains, water supply pipes and gas pipes, etc.);
- Operation, plastic pipe business (capacity, output, sales volume, projects under construction, etc.) and development prospects of 12 Chinese plastic pipe manufacturers;
- Forecast for China's plastic pipe trends in 2014-2017.

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