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Our Plastics Information Service has been following the market for heating and plumbing systems in domestic installations very closely for more than 40 years. Of course, there were big changes in the markets for metal pipes as well as in the markets for PEX and Multilayer pipes.

KWD Market+Charts „Heating&Plumbing Europe 2009”

In our latest update we analyze the market development of metal, plastic and multilayer pipes from 2006 to 2012. We show the changes in pipe materials for 28 countries in detailed charts. Our commentary can be found in “Documentation and Marketing”. Over 4.190 companies, including addresses and web information, are listed in Volume II.

Volume I. Marketing

Long Term Charts 2006 – 2012

- in “Million Metres” 87 pages
- in “Million Euros” 87 pages
- in “Tons” 87 pages
- in “Million Fittings” 87 pages

Year 2009 32 pages

Pipe Materials in Europe 2006 – 2012 9 pages

European Overview 2008 - 2010 3 pages

Certification and Market Information 91 pages

Volume II. Companies

4.190 Companies, alphabetical 58 pages

Companies by Product Groups 79 pages

Companies and Products by Countries 458 pages



The new **Premium Version** contains all figures in **Excel** and **PowerPoint** format:

FH + RA + SA - Total Denmark										
in Million Metres										
Year	Metal Pipes			Plastic Pipes				Multilayer Pipes		
	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	PEVAL	PERT/A
2005	4,30	2,58	0,60	0,00	7,10	4,40	0,00	0,00	2,00	4,0
2006	4,90	2,08	0,65	0,00	6,40	4,30	0,00	0,00	2,20	5,8
2007	4,80	1,87	0,70	0,00	5,00	3,20	0,00	0,00	1,90	7,3
2008	4,40	1,57	0,60	0,00	3,60	2,50	0,00	0,00	1,80	6,4
2009	4,30	1,36	0,60	0,00	3,30	2,65	0,00	0,00	1,20	7,0
2010	4,20	1,36	0,90	0,00	3,00	2,90	0,00	0,00	1,10	8,3
2011	4,10	1,17	1,00	0,00	2,70	3,10	0,00	0,00	0,70	9,5

% Market Share										
2005	17,21	10,33	2,40	0,00	28,42	17,61	0,00	0,00	8,01	16,0
2006	18,75	7,96	2,49	0,00	24,49	16,46	0,00	0,00	8,42	21,4
2007	18,72	7,61	2,85	0,00	20,35	13,02	0,00	0,00	7,73	29,6
2008	21,18	7,56	3,85	0,00	17,33	15,04	0,00	0,00	7,20	20,8
2009	20,86	6,60	3,88	0,00	15,00	15,00	0,00	0,00	7,20	20,8
2010	19,30	6,25	4,14	0,00	15,00	15,00	0,00	0,00	7,20	20,8
2011	18,58	5,30	4,53	0,00	15,00	15,00	0,00	0,00	7,20	20,8

+/- % Change on Previous Years										
2005	...	...	...	...	...	...	...	...	...	...
2006	13,95%	-19,38%	8,33%	...	...	...	...	...	...	...
2007	-6,12%	-10,10%	7,69%	...	...	...	...	...	...	...
2008	-4,35%	-16,04%	14,29%	...	...	...	...	...	...	...
2009	-2,27%	-13,38%	0,00%	...	...	...	...	...	...	...
2010	-2,33%	0,00%	12,50%	...	...	...	...	...	...	...
2011	-2,38%	-13,97%	11,11%	...	...	...	...	...	...	...

DK - The most important pipe materials / FH

Price and Information

Again we offer the **Premium Version** with all figures in **Excel** format and the more obvious trends in 28 European countries in **PowerPoint** format

KWD Market+Charts “Heating&Plumbing Europe 2009”	Price in Euros	only for Subscribers
Standard Version, 28 Countries, 4.190 Companies, CD + Print	920,- €	680,- €
Premium Version, incl. Excel-Spreadsheet + PowerPoint Slides	1.220,- €	980,- €

Please find on the following pages samples of each chapter of the market study as well as the order-form at the end of this document. If you have any further questions, please contact: hix@kwd-online.de

Preface

Our Plastics Information Service has been following the market for heating and plumbing systems in domestic installations very closely for more than 40 years.

When we started our KWD newsletter back in 1974, welded, soldered or bolted steel and copper pipes were dominating the market. We started our reporting about the development of the then nascent markets for PP-R, PB, CPVC and PE-X pipes and - some time later - for multilayer pipes in German. In 2001, we added KWD-globalpipe in English and thus our readership became more and more international. Today, we closely follow and comprehensively report about the pipe and fittings business around the world.

Of course, there were big changes in the markets for metal pipes as well, leading to – among others - today's thin-walled and flexible copper-PE pipes, and the coupling technology has changed beyond any belief as well. Crimp fittings are still on the rise, and it is by far not yet certain that push-fit fittings will eventually conquer any significant market share – even though a lot of companies now offer those. The unprecedented rise of metal prices over the past few years has certainly played a significant role in changing these markets although prices for plastic raw materials have also increased. By the end of 2008, prices for polymers started to drop, but it is not easy to win back lost territory. Among plastic pipes, PE-RT is getting more accepted and PP-R – mainly used in Eastern Europe – due to its lower price.

An equally dramatic sea change as the displacement of metal through plastic pipes is happening right now heavily induced by the way people think about how to use energy more efficiently now and in the future. The use of renewable energy delivered by heat pumps, solar panels or wind turbines and others combined with ever more efficient building insulation is changing the way we distribute energy inside our buildings. This may even lead to a reduction of the large market share of under-floor heating and a replacement by some other system.

In this new edition of KWD Charts and Market Surveys we have tried to illustrate these trends and developments as precisely as possible with no reliable statistics available.

Again, we have included a Premium Version with all figures and data in Excel format which can easily be integrated into your own databases. Also, a Power Point presentation is included in the Premium Version that gives an overview of the more general trends in European countries. This is especially aimed at marketing managers who are increasingly lacking time and staff and who can thus get an overview of certain markets and trends very quickly.

Schwelm, September 2009

Dipl.-Ing. Jutta Hix (née Hamich), Michaela Hamich-Helbrecht and Ralf Hamich

KWD Market + Charts "Heating & Plumbing Europe 2008"

Update 2009-09

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FH + RA + SA = Total per Country

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KWD Market + Charts "Heating & Plumbing 2009"
 Long Term Charts 2006 - 2012: Pipes in "Million Metres"

DK DENMARK

FH

Million Metres

FH DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006		0,08			4,80	3,80			2,20	10,88
2007		0,07			4,65	3,30			2,50	10,52
2008		0,07			4,50	3,00			2,10	9,67
2009		0,06			4,30	2,80			1,60	8,76
2010		0,06			4,20	2,60			1,60	8,46
2011		0,07			4,30	2,70			1,70	8,77
2012		0,08			4,35	2,75			1,80	8,98

% Market Share

FH DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006		0,74			44,12	34,93			20,22	100,00
2007		0,67			44,20	31,37			23,76	100,00
2008		0,72			46,54	31,02			21,72	100,00
2009		0,68			49,09	31,96			18,26	100,00
2010		0,71			49,65	30,73			18,91	100,00
2011		0,80			49,03	30,79			19,38	100,00
2012		0,89			48,44	30,62			20,04	100,00

+/- % Change on Previous Year

FH DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
2007	0,00	-12,50	0,00	0,00	-3,12	-13,16	0,00	0,00	13,64	-3,31
2008	0,00	0,00	0,00	0,00	-3,23	-9,09	0,00	0,00	-16,00	-8,08
2009	0,00	-14,29	0,00	0,00	-4,44	-6,67	0,00	0,00	-23,81	-9,41
2010	0,00	0,00	0,00	0,00	-2,33	-7,14	0,00	0,00	0,00	-3,42
2011	0,00	16,67	0,00	0,00	2,38	3,85	0,00	0,00	6,25	3,66
2012	0,00	14,29	0,00	0,00	1,16	1,85	0,00	0,00	5,88	2,39

RA

Million Metres

RA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	2,60	0,90			1,00	0,30			3,10	7,90
2007	2,50	0,80			0,80	0,20			3,00	7,30
2008	2,40	0,70			0,60	0,20			2,60	6,50
2009	2,10	0,50			0,50	0,15			2,20	5,45
2010	1,90	0,50			0,40	0,10			2,35	5,25
2011	1,90	0,60			0,40	0,10			2,30	5,30
2012	1,85	0,60			0,40	0,10			2,25	5,20

KWD Market + Charts "Heating & Plumbing 2009"
 Long Term Charts 2006 - 2012: Pipes in "Million Metres"

% Market Share

RA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	32,91	11,39			12,66	3,80			39,24	100,00
2007	34,25	10,96			10,96	2,74			41,10	100,00
2008	36,92	10,77			9,23	3,08			40,00	100,00
2009	38,53	9,17			9,17	2,75			40,37	100,00
2010	36,19	9,52			7,62	1,90			44,76	100,00
2011	35,85	11,32			7,55	1,89			43,40	100,00
2012	35,58	11,54			7,69	1,92			43,27	100,00

+/- % Change on Previous Year

RA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
2007	-3,85	-11,11	0,00	0,00	-20,00	-33,33	0,00	0,00	-3,23	-7,59
2008	-4,00	-12,50	0,00	0,00	-25,00	0,00	0,00	0,00	-13,33	-10,96
2009	-12,50	-28,57	0,00	0,00	-16,67	-25,00	0,00	0,00	-15,38	-16,15
2010	-9,52	0,00	0,00	0,00	-20,00	-33,33	0,00	0,00	6,82	-3,67
2011	0,00	20,00	0,00	0,00	0,00	0,00	0,00	0,00	-2,13	0,95
2012	-2,63	0,00	0,00	0,00	0,00	0,00	0,00	0,00	-2,17	-1,89

SA

Million Metres

SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	2,30	1,10	0,65		0,60	0,40			2,50	7,55
2007	2,10	1,00	0,70		0,50	0,50			3,00	7,80
2008	2,00	0,80	0,80		0,40	0,45			2,50	6,95
2009	1,80	0,70	0,70		0,30	0,40			2,30	6,20
2010	1,80	0,70	0,75		0,23	0,35			2,30	6,13
2011	1,80	0,60	0,80		0,30	0,40			2,50	6,40
2012	1,80	0,70	0,80		0,30	0,45			2,70	6,75

% Market Share

SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	30,46	14,57	8,61		7,95	5,30			33,11	100,00
2007	26,92	12,82	8,97		6,41	6,41			38,46	100,00
2008	28,78	11,51	11,51		5,76	6,47			35,97	100,00
2009	29,03	11,29	11,29		4,84	6,45			37,10	100,00
2010	29,36	11,42	12,23		3,75	5,71			37,52	100,00
2011	28,12	9,38	12,50		4,69	6,25			39,06	100,00
2012	26,67	10,37	11,85		4,44	6,67			40,00	100,00

KWD Market + Charts "Heating & Plumbing 2009"
 Long Term Charts 2006 - 2012: Pipes in "Million Metres"

+/- % Change on Previous Year

SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
2007	-8,70	-9,09	7,69	0,00	-16,67	25,00	0,00	0,00	20,00	3,31
2008	-4,76	-20,00	14,29	0,00	-20,00	-10,00	0,00	0,00	-16,67	-10,90
2009	-10,00	-12,50	-12,50	0,00	-25,00	-11,11	0,00	0,00	-8,00	-10,79
2010	0,00	0,00	7,14	0,00	-23,33	-12,50	0,00	0,00	0,00	-1,13
2011	0,00	-14,29	6,67	0,00	30,43	14,29	0,00	0,00	8,70	4,40
2012	0,00	16,67	0,00	0,00	0,00	12,50	0,00	0,00	8,00	5,47

FH+RA+SA

Million Metres

FH+RA+SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	4,90	2,08	0,65		6,40	4,50			7,80	26,33
2007	4,60	1,87	0,70		5,95	4,00			8,50	25,62
2008	4,40	1,57	0,80		5,50	3,65			7,20	23,12
2009	3,90	1,26	0,70		5,10	3,35			6,10	20,41
2010	3,70	1,26	0,75		4,83	3,05			6,25	19,84
2011	3,70	1,27	0,80		5,00	3,20			6,50	20,47
2012	3,65	1,38	0,80		5,05	3,30			6,75	20,93

% Market Share

FH+RA+SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	18,61	7,90	2,47		24,31	17,09			29,62	100,00
2007	17,95	7,30	2,73		23,22	15,61			33,18	100,00
2008	19,03	6,79	3,46		23,79	15,79			31,14	100,00
2009	19,11	6,17	3,43		24,99	16,41			29,89	100,00
2010	18,65	6,35	3,78		24,34	15,37			31,50	100,00
2011	18,08	6,20	3,91		24,43	15,63			31,75	100,00
2012	17,44	6,59	3,82		24,13	15,77			32,25	100,00

+/- % Change on Previous Year

FH+RA+SA DENMARK

Year	C-Steel	Copper	StSteel	CPVC	PEX	PE-RT	PP-R	PB	ML	Total
2006	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
2007	-6,12	-10,10	7,69	0,00	-7,03	-11,11	0,00	0,00	8,97	-2,70
2008	-4,35	-16,04	14,29	0,00	-7,56	-8,75	0,00	0,00	-15,29	-9,76
2009	-11,36	-19,75	-12,50	0,00	-7,27	-8,22	0,00	0,00	-15,28	-11,72
2010	-5,13	0,00	7,14	0,00	-5,29	-8,96	0,00	0,00	2,46	-2,79
2011	0,00	0,79	6,67	0,00	3,52	4,92	0,00	0,00	4,00	3,18
2012	-1,35	8,66	0,00	0,00	1,00	3,12	0,00	0,00	3,85	2,25

KWD Market + Charts "Heating & Plumbing 2009"
Year 2009: FH, RA and SA by Comparison

(Tons)

2009

RO ROMANIA

	RA	SA	Total
C-Steel		1216,00	1216,00
Copper	126,00	1344,00	1386,00
StSteel			
Total	126,00	2560,00	2602,00

	FH	RA	SA	Total
CPVC			10,00	10,00
PEX	42,50	25,50	51,00	119,00
PE-RT	212,50	8,50		221,00
PP-R	176,00	88,00	319,00	583,00
PB	9,90		11,00	20,90
ML	32,50	500,50	533,00	1066,00
Total	473,40	622,50	924,00	2019,90

	Total
FH	599,40
RA	3182,50
SA	3526,00
Total	7307,90

2009

S SWEDEN

	RA	SA	Total
C-Steel		1728,00	1728,00
Copper	12,60	1596,00	882,00
StSteel		448,00	448,00
Total	12,60	3324,00	1330,00

	FH	RA	SA	Total
CPVC			5,00	5,00
PEX	943,50	68,00	212,50	1224,00
PE-RT	214,20	8,50	17,00	239,70
PP-R			22,00	22,00
PB				
ML	19,50	312,00	468,00	799,50
Total	1177,20	388,50	724,50	2290,20

	Total
FH	1189,80
RA	3712,50
SA	2054,50
Total	6956,80

2009

SK SLOVAKIA

	RA	SA	Total
C-Steel	32,00	320,00	832,00
Copper		336,00	273,00
StSteel			
Total	32,00	656,00	1105,00

	FH	RA	SA	Total
CPVC				
PEX			59,50	59,50
PE-RT	127,50	12,75	4,25	144,50
PP-R			165,00	165,00
PB	11,00		11,00	22,00
ML	18,20	273,00	143,00	434,20
Total	156,70	285,75	382,75	825,20

	Total
FH	188,70
RA	941,75
SA	1487,75
Total	2618,20

2009

SLO SLOVENIA

	RA	SA	Total
C-Steel		160,00	352,00
Copper	16,80	121,80	247,80
StSteel			
Total	16,80	281,80	599,80

	FH	RA	SA	Total
CPVC				
PEX	46,75	28,90	23,80	99,45
PE-RT	17,00	12,75		29,75
PP-R	22,00	8,80	187,00	217,80
PB	22,00	16,50	16,50	55,00
ML	5,20	58,50	91,00	154,70
Total	112,95	125,45	318,30	556,70

	Total
FH	129,75
RA	407,25
SA	918,10
Total	1455,10

Europe

C-Steel

Million Metres

Year	FH	RA	SA	C-Steel Europe Total
2006	0,10	70,22	41,90	112,22
2007	0,10	66,82	39,65	106,57
2008	0,10	62,97	37,21	100,28
2009	0,05	57,56	33,06	90,67
2010		54,58	30,04	84,62
2011		52,87	28,30	81,17
2012		51,40	27,87	79,27

% Market Share

Year	FH	RA	SA	C-Steel Europe Total
2006	0,09	62,57	37,34	100,00
2007	0,09	62,70	37,21	100,00
2008	0,10	62,79	37,11	100,00
2009	0,06	63,48	36,46	100,00
2010		64,50	35,50	100,00
2011		65,13	34,87	100,00
2012		64,84	35,16	100,00

+/- % Change on Previous Year

Year	FH	RA	SA	C-Steel Europe Total
2006	0,00	0,00	0,00	0,00
2007	0,00	-4,84	-5,37	-5,03
2008	0,00	-5,76	-6,15	-5,90
2009	-50,00	-8,59	-11,15	-9,58
2010	-100,00	-5,18	-9,13	-6,67
2011	0,00	-3,13	-5,79	-4,08
2012	0,00	-2,78	-1,52	-2,34



II. Companies

Update 2009-09

KWD Market + Charts:

“Heating & Plumbing Europe 2009”

Author: Dipl.-Ing. Jutta Hix

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- SUPERSAN CU-Sanit rrohre
- FRIGOTEC LWC K lte/Klima-Rohre
- EUROSAN ummanteltes Kupferrohr
- CARO Supersan Kupferrohr

Producer of: Copper pipes
 Company is: Branch, office
 Systems: Potable water systems/ Domestic hot water
 Systems: Radiator connection systems

Centra Regelungstechnik, Honeywell AG

B blinger Str. 17
 D- 71101 Sch naich
 Tel. +49-7031-637-01, Fax +49-7031-637-493
<http://www.honeywell.de/hga>

- Honeywell-Produkte
- Braukmann Armaturen

Producer of: Taps and valves / faucets
 Company is: Manufacturer
 Products: Taps+valves for heating+hot water installations
 Products: Control technology and equipment

CERTUSS Dampfautomaten GmbH&Co KG

Hfenstr. 65
 D- 47809 Krefeld
 Tel. +49-2151-578-0, Fax +49-2151-578-238
verkauf@certuss.de, <http://www.certuss.de>

- Dampfautomaten

Products: Heating boilers, water heaters

Cetetherm W rmetauschersysteme GmbH

Kolumbusstr. 14
 D- 22113 Hamburg
 Tel. +49-40-733 52-0, Fax +49-40-732 51-99

- Cetetherm Plattenw rmetauscher
- W rmetauscher
- Fernw rme-Kompaktstation

Products: Control technology and equipment

CH-TEC Produktions GmbH

D- 09120 Chemnitz
 Tel. +49-172-377 977,

- PE-RT Heizungsrohre
- SKZ A 425 Heizungsrohre aus PER-RT

Products: Insulation materials for pipes and valves
 Systems: DIY Do-it-yourself systems
 Systems: Hydronic floorheating
 Systems: Multilayer pipes/ Sandwich pipes

Ciba Spezialit tenchemie

Lampertheim GmbH
 Chemiestrasse
 D- 68623 Lampertheim
 Tel. +49-6206-15-0, Fax +49-6206-15-1368
klaus.kochendoerfer@cibasc.com,
<http://www.cibasc.com>

Company is: Producer of granulate, compounds, auxiliaries

CISAL Sanit r-Armaturen Vertriebs-GmbH

Gewerbestr. 8
 D- 91452 Wilhermsdorf
 Tel. 09102-93820, Fax 09102-938282
CISAL@nea-online.de, <http://www.CISAL.de>

- CISAL Armaturen

Producer of: Taps and valves / faucets

Climadesign - Energiesparsysteme

Bismarckstr. 39
 D- 15566 Sch neiche bei Berlin
 Tel. +49-30-6438 7373, Fax +49-30-6432 8347
info@climadesign.net, <http://www.climadesign.net>

- BeKa Fl chenheizung
- BeKa Kapillarrohmatte PPC
- BeKa K hldecke
- Selbstbausatz

Systems: Radiator connection systems
 Systems: Hydronic floorheating
 Systems: Static ceiling cooling systems
 Products: Wall heating systems, ceiling heating systems
 Systems: DIY Do-it-yourself systems

Clina Heiz- und K hlelemente

Produktion GmbH
 Taborstr. 14A
 D- 10997 Berlin
 Tel. +49-30-612 88747,

- PP-K hlmatte
- PP-R Kapillarrohre
- Clina-Kunststoffrohmatte
- Clina-System Raumklimatisierung
- Bioclima Kapillarrohrsystem

Systems: Hydronic floorheating
 Producer of: PP-R pipes (Polypropylene)
 Systems: Air conditioning
 Systems: Static ceiling cooling systems
 Company is: Manufacturer
 Products: Wall heating systems, ceiling heating systems

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CnpiecGermany@aol.com,

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