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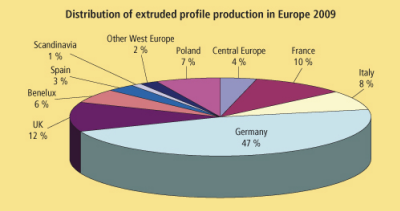
New market reports on profile extrusion and on plastic tubes and hoses

Applied Market Information Ltd. (AMI) has recently published two new market studies. The first report, titled “AMI’s guide to the profile extrusion industry in Europe”, details the plant locations and activities of Europe’s thermoplastic profile extruders. This sector accounts for around 5 % of total polymer demand in Europe involving nearly 900 companies. The report covers producers of both rigid and flexible profiles.



The profile extrusion sector covered in the report primarily relates to the manufacture of rigid profiles for the production of window, door and conservatory frames. However, there are also a variety of other products that can be manufactured by this process including shutters, cladding, furniture and automotive components, ducting, curtain tracks and a variety of other miscellaneous consumer, industrial and building products. As such it is primarily a sub-market of the PVC industry and AMI estimates that over 90 % of production is in PVC. The remainder of the market is mainly accounted for by PE materials with some small volumes of PP, PS, TPEs and engineering plastics.

The report covers producers of both rigid and flexible profiles. Rigid profiles: mainly based on unplasticised PVC are primarily used in building applications and include window frames, door frames, sills, barge boards, cladding, shutters and blinds, skirting boards and cable trays. Flexible profiles: mainly based on plasticised PVC, polyolefins or thermoplastic elastomers, are offered for a wide range of small trim and sealing applications mostly to specifications determined by the end user in automotive, domestic appliance and other related end use markets.

The largest share of the market is accounted for by the manufacture of window and building profiles. Around 65 % of production is for these type of products. The AMI database includes the details of the European production sites for the leading building profile producing groups such as **Profine, Veka, Rehau, Alphacan, Deceuninck** and the **Tessenderlo Group.**

Germany is by far the most important market for the production of profiles. It accounts for nearly half of the market in polymer demand terms. Italy has the next largest number of profile extruding companies, although the production of profiles in Italy is relatively unusual in that it is applications other than window frames which represent the largest share of polymer consumption, mainly in the form of profiles for blinds, doors and shutters.

The second new AMI market report, **"Unravelling the plastic tube and hose market in Europe",** provides information on more than 670 companies in a sector of the plastics processing industry estimated to account for approximately 700 kt/y of polymer material.

Hoses and tubes are designed to help convey a gas or liquid without it mixing with the external environment. Most plastic hoses are designed to be flexible to a greater of lesser extent, while tubing can be either flexible or rigid, depending on the applications. Hoses and tubes may be made via simple extrusion or co-extrusion or by the incorporation of reinforcement. Reinforcement may take the form of a spirally wound filament (metal or textile) or by co-extrusion or lamination onto a textile or metal substrate.

Thermoplastic hose and tube extrusion covers a diverse range of products ranging from standard garden hoses through to speciality medical and automotive tubing systems. AMI's guide breaks down the key end use sectors for each supplier of hose and tube into five main groups: automotive, medical, horticulture/agriculture, food & drink and electrical conduit.

According to the report, automotive is the most widely served end use sector with 27 % of hose and tube manufacturers listed in the guide engaged in the supply of fuel tank and other automotive tubing applications. Medical and horticulture/agriculture with 25 % and 22 %, respectively, are the next largest markets. The food & drink sector is supplied by 15 % of hose and tube manufactures surveyed, with 11 % supplying electrical conduit. Food & drink tubing includes drinking straws, tubes for food packaging and drink dispensing tubes. Blow moulded cream and toothpaste tubes are not included in the definition. The electrical conduit sector includes tube that could be rigid or flexible and can be corrugated to protect other pipes or cables, mainly used inside walls, but does not include underground cable ducting pipes and cable trunking profiles.

Other key markets identified include tubes and hoses for domestic electrical appliances, lighting, chemical industry, building industry, verandas, industrial ducting, mining, aquariums, bird cages and curtain rails.

PVC, because of its comparatively low cost, good performance and processing properties, dominates the market for hose and tube

extrusion accounting for 55 % of processed polymer volumes in 2009. AMI's research found that over 90 % of hose and tube manufacturers are using either rigid or flexible PVC. PVC has a wide range of applications. Most of the hoses produced for use in horticulture and agriculture are made from PVC. Other applications include flexible and rigid indoor cable protection conduit, tubing for washing machines and other domestic appliances, and medical tubing for delivery of blood and other fluids. Polyolefins is the other main material used in this sector accounting for around 40 % of polymer volumes used. Other materials used include polyamide and thermoplastic elastomers.

Like most sectors of the plastics processing industry tube and hose extruders have seen their business shrink during the recession. European plastic hose and tube extrusion demand was severely affected by the downturn in demand and production for key end use sectors during the recession, particularly, automotive, building and construction, industrial machinery and domestic electrical appliances. The supply side of the sector was also unfavourable, with energy, transport, labour and raw material cost increases threatening European flexible tube producers.

A modest upturn in demand is expected to occur during 2010 as the European economy moves out of recession. Plastic hose and tube demand growth is forecast to revert back to its trend growth rate of between 2 – 3 % per annum over the next five years.

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