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CBI
Ministry of Foreign Affairs of the Netherlands

Seamless pipes in Belgium

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in Belgium. It is the seventh largest market in the EU and it experienced a good demand growth between 2005 and 2009.

Market characteristics

- Belgium is a medium-sized market for seamless pipes in the EU. It is the seventh largest, behind the UK and the Netherlands, but ahead of Austria and Poland. Apparent demand in 2009 totalled €1.1 billion. Compound Annual Growth Rate (CAGR) in the period under review (2005-2009) was 18%. Refer to Table 1 for more information on the several types of seamless pipes used in Belgium. In general, the market is mature and mainly consists of replacements and the maintenance of existing equipment.

Table 1 Belgian demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**129**	**356**	**138**	**1.8%**
steel, hot finished	66	220	84	6.2%
steel, cold finished	17	19	22	7.5%
stainless steel	38	97	17	-17.7%
steel, other	8	20	14	16.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Belgian construction sector recovered from the crisis with a growth of 0.3% in 2010. Throughout the year, the activities of the residential sector (including new building and renovation markets) were stimulated by the government's tax advantages. Similarly, the infrastructure sector benefited from government investments in separated sewers and the extension of networks. In comparison, the non-residential segment was low as companies postponed investments. Outlook for 2011 is positive with an expected growth of around 1.8%, driven mostly by the new housing sector.
- Belgium is a medium-sized producer of seamless pipes in the EU. It is the tenth largest, behind Sweden and the Czech Republic, but ahead of Finland and Poland. Production in 2009 amounted to €804 million, after an annual growth of 24% between 2005 and 2009.
- As a result of a large drop in imports in 2009 (-45%), imports declined by 5.5% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €200 million in 2010. Imports from DCs totalled €14 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in the share (from 17 to 6.8%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.

- China accounted for 62% of all imports coming from DCs. China was followed by South Africa (23%), India (4.2%) and Ukraine (2.2%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€1.5/kg) are lower than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €1.1/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Belgium's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**251**	**361**	**200**	**43.2**	**96.0**	**13.6**	**-5.5%**	**-25.0%**	**6.8%**
alloy steel hot processed	29	38	24	0.0	4.6	4.8	-5.2%	2107.8%	20.1%
iron or non-alloy steel, hot processed	68	136	64	16.0	63.2	2.9	-1.8%	-34.8%	4.6%
line pipe for oil or gas	52	75	58	3.5	12.5	2.5	2.9%	-7.9%	4.3%
stainless steel cold processed	19	19	18	4.0	4.8	2.2	-0.8%	-14.0%	12.3%
stainless steel hot processed	39	4	4	13.2	0.5	0.5	-45.3%	-55.1%	15.3%
drill pipe for oil or gas	14	27	10	3.0	3.6	0.4	-7.9%	-38.5%	4.2%
construction pipes	8	32	10	1.1	0.1	0.2	6.6%	-32.3%	2.3%
precision tubes	8	14	7	0.2	3.2	0.1	-5.5%	-22.5%	1.2%
threaded gas pipe	4	2	2	1.1	0.0	0.0	-19.6%	-66.0%	0.8%
alloy steel cold processed	5	5	2	0.1	2.0	0.0	-24.0%	-88.2%	0.0%
iron or non-alloy steel, cold processed	4	10	3	1.0	1.5	0.0	-5.4%	-100.0%	0.0%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Belgium or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abc-d.be - type a keyword and search for companies.
- Aqua Belgica - http://www.aquabelgica.be - Belgian professional association in the water treatment industry. Click on 'ledenlijst' or 'liste de membres' (list of members).
- Aquarama - http://www.aquarama.be - annual trade fair and workshop on water technology, held yearly (November), in Nekkerhal Mechelen.
- EasyFair Factory & Process Automation - http://www.easyfairs.com - in the "Volgende beurzen in" drop-down box, choose "België". The first fair was held in Brussels in October 2010.
- Federation for the Technology Industry - http://www.agoria.be - Click on 'Find a company' and 'Advanced' to search Belgium-based companies by product names.
- Indumation - http://www.indumation.be - trade fair for factory, process and infrastructure automation, held every odd year (April), in Kortrij.
- Sub-contracting - http://www.subcontracting.be - metal and synthetic material industry trade fair, held biennially (October) in Antwerp.

Interesting players

Examples of interesting players are:

- Dylan - http://www.dylan.be - international distributor from the Netherlands.
- Eurasteel - http://www.eurasteel.be - trader of steel products, including seamless pipes.
- FBF - http://www.fbf.be - stockholding distributor of seamless and welded pipes.
- Flowell - http://www.flowell.be - producer of seamless steel pipes.
- Herregods-Franssen - http://www.herregods-franssen.be - steel tube trader.
- MCB België - http://www.mcb.be - distributor of seamless pipes.
- Sadel Stainless Steel - http://www.sadel.be - wholesale distributor of stainless steel pipes, bars and appliances.
- SSIMEX - http://www.ssimex.be - importer/exporter of seamless tubes.
- ThyssenKrupp Christon - http://www.tkchriston.be - German producer of stainless steel products, including seamless pipes; operating in Belgium.
- Van Leeuwen Buizen - http://www.vanleeuwenbuizen.be - distributor of pipes and fittings; part of Van Leeuwen Pipe and Tube Group (http://www.vanleeuwenbuizen.com).

Belgium hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Belgian Petroleum Federation (FPB-BPF) - http://www.petrolfed.be - news and information.
- Fluids Processing Benelux - http://www.fluidsprocessing.be - online trade magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Technique and Management - http://www.technique-et-management.be (French) or http://www.technisch-management.be (Dutch) - trade magazine for process equipment.

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Seamless pipes in Bulgaria

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in Bulgaria. It ranks as the seventeenth largest market in the EU. Despite the market decline between 2005 and 2009, the market has some potential as the Bulgarian industrial sector is expected to gradually upgrade their processes to match Western European standards. This will consequently stimulate market demand for seamless pipes.

Market characteristics

- Bulgaria is a small market for seamless pipes in the EU. It is the seventeenth largest, behind Ireland and Hungary, but ahead of Denmark and Portugal. Apparent demand in 2009 totalled €24 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -11%.
  Refer to Table 1 for more information on the several types of seamless pipes used in Bulgaria.

Table 1 Bulgarian demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**38**	**54**	**24**	**-11.1%**
steel, hot finished	19	25	11	-13.4%
steel, cold finished	15	22	9	-12.1%
stainless steel	3	5	3	-4.5%
steel, other	1	3	1	16.0%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Bulgarian construction sector continued to contract in the first half of 2011, which has significantly impacted the demand for seamless pipes. Due mostly to the suspension of real estate construction in 2009-2010, the sector has declined by 25-30%, which is much higher than in most other EU countries. The sector is expected to see a moderately positive growth in 2011 and 2012; movement will come from infrastructure construction, such as the planned railway infrastructure project. In general, the uncertain economic environment and financial problems continue to limit construction activities.
- Bulgaria's industrial sector has grown slowly, but steadily, since the communist era in 2000. Many end-user industries of seamless pipes in Bulgaria are still immature or developing, and a significant share of the seamless pipe market is expected to emerge from new installations.
- Like many Central and Eastern European countries, industrial users of seamless pipes will need to upgrade their processes to match Western European standards in order to be competitive. In the water industry, for example, investments are expected in water

collection and distribution, sewer networks and waste water treament, so as to comply with the EU Water Directives by 2015.

- Bulgaria is a small producer of seamless pipes in the EU. It is the seventeenth largest, behind Ireland and Hungary, but ahead of Finland and Estonia. Production in 2009 amounted to €2.7 million, after an annual growth of 12% between 2005 and 2009. Inter Pipe is the largest Bulgarian producer.
- As a result of a large drop in imports in 2009 (-56%), imports declined by 16% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €26 million in 2010. Imports from DCs totalled €4.8 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in the share (from 40 to 19%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.
- Ukraine was the leading DC supplier, accounting for 51% of all imports coming from DCs, followed by Turkey (23%), China (18%), Belarus (5.0%) and Croatia (2.6%). Of the main DC suppliers, only China and Turkey experienced growth (+73% and +12% per year respectively).
- The prices of imports (€1.3/kg) are lower than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €0.8/kg in 2010 (€1.3/kg in the EU). Price remains very important in this country, as in other Central and Eastern European countries. A first selection is often based on price.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Bulgaria's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**52**	**61**	**26**	**20.5**	**21.2**	**4.8**	**-15.9%**	**-30.3%**	**18.7%**
iron or non-alloy steel, hot processed	22	19	8	13.4	10.5	3.5	-21.2%	-28.7%	41.0%
iron or non-alloy steel, cold processed	4	8	3	2.4	4.6	0.9	-8.2%	-22.6%	27.3%
precision tubes	11	14	7	0.6	2.3	0.3	-10.0%	-15.9%	4.1%
line pipe for oil or gas	1	6	3	0.0	0.4	0.1	28.3%	22.9%	2.5%
stainless steel cold processed	2	3	0	0.9	1.9	0.1	-34.3%	-48.5%	14.4%
construction pipes	4	5	1	0.1	0.2	0.0	-29.6%	-6.2%	5.4%
alloy steel cold processed	3	0	0	2.2	0.2	0.0	-36.1%	-64.1%	8.5%
alloy steel hot processed	1	2	1	0.1	0.5	0.0	12.5%	-32.8%	1.2%
threaded gas pipe	0	2	0	0.0	0.1	0.0	-20.5%	40.6%	2.4%
stainless steel hot processed	1	1	0	0.3	0.0	0.0	-41.7%	-81.5%	0.2%
drill pipe for oil or gas	2	2	1	0.6	0.5	0.0	-22.3%	-85.6%	0.0%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Bulgaria or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Aquatech - http://www.fair.bg - annual water management fair in Plovdiv in September.

- BG Catalog - http://www.bgcatalog.com - business portal, search by product name.
- Bulgaria online - http://www.online.bg - Bulgarian portal with a lot of useful business links.
- Bulgarian Association of the Metallurgical Industry - http://www.bcm-bg.com - comprises around 40 members whose names are shown on the website; click “Members”.
- Bulgarian chamber of commerce and industry trade directory - http://www.bcci.bg/services/directory.htm - log in as a guest and search for companies.
- Bulgarian Industrial Capital Association - http://www.bica-bg.org - comprises more than 40,000 enterprises in all industrial sectors in Bulgaria. Click on ‘Members’ and register.
- Catalog - http://catalog.bg - Bulgarian online trade directory.
- Foodtech - http://www.fair.bg - food processing equipment fair, annually (May) in Plovdiv.
- Invest Bulgaria - http://www.investbulgaria.com - Bulgarian business directory, including end customer industries, such as waste management.
- Need.bg - http://www.need.bg - search by keyword, such as ‘pipes’.
- The Agriculture and Everything for it - http://www.dobrich-fair.com - trade fair for food processing equipment, held annually in Dobrich around August and September.

Interesting players

Examples of interesting players are:

- AGC - http://www.agc-bg.com - importer and distributor of pipes, rotary valves and fittings.
- Anri-CB - http://www.anrisv.bg - steel trader.
- Betta Contech - http://betta.bg/en - distributor of seamless pipes, valves and fittings.
- Intercom Group - http://www.intercomgroup.bg - producer of metal products.
- Klöckner Metalsnab - http://www.metalsnab.com - imports and distributes metal products, including seamless pipes.
- Maiak-M - http://www.maiak-m.bg - importer and distributor of metal pipes.
- MTM - http://www.mtm.bg - distributor of materials for construction and industry, including seamless pipes.
- Steel Distribution - http://www.steeldistribution.bg - distributor of hot rolled seamless steel pipes.

Bulgaria hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Engineering - http://www.tllmedia.bg - several industrial magazines.
- Foodtech - http://www.fair.bg - food processing equipment fair, annually (May) in Plovdiv.
- Journal of Materials Science and Technology - http://jmst.ims.bas.bg - four times a year.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

Seamless pipes in France

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in France. France represents the EU's largest market for seamless pipes and experienced a positive growth in apparent demand during 2005-2009. Despite the currently low share of imports from DCs in the total import of seamless pipes, they recorded a positive growth during 2006-2010.

Market characteristics

- France is the largest market for seamless pipes in the EU, ahead of Germany and Italy. Apparent demand in 2009 totalled €885 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 10%. Refer to Table 1 for more information.

Table 1 French demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**596**	**1,131**	**885**	**10.4%**
stainless steel	34	262	513	96.7%
steel, cold finished	190	263	191	0.1%
steel, hot finished	338	548	130	-21.3%
steel, other	33	59	51	11.3%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- French industrial production output improved in 2010 continuing at the beginning of 2011 after a steep decline in 2009. The year-on-year output of the manufacturing sector rose by around 4-5% in May 2011.
- The market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by continuously high investments in the power generation network.
- The troubled French construction sector (-4.2% in 2010) is expected to finally show a positive (but modest) growth in 2011 and beyond. A large share of this growth will be attributed to the infrastructure sector, due to a number of planned pipeline projects. The residential and non-residential construction industry is expected to stagnate. A number of indicators support the upward trend of the sector, including a planned investment of €32 billion on the transport network in and around Paris between 2010 and 2025, and the 106 kilometer canal project to connect the river Seine with Germany's Rhine-Scheldt waterway network.
- France is a large producer of seamless pipes in the EU. It is the second largest, behind Germany, but ahead of the UK and Italy. Production in 2009 amounted to €1.2 billion, after an annual decline of 3.0% between 2005 and 2009. Vallourec is a globally renowned French pipe producer, specialised in hot rolled seamless pipes, and in the energy and industrial markets.

- As a result of a large drop in imports in 2009 (-35%), imports declined by 7.7% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €397 million in 2010. Imports from DCs totalled €19 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in the share (from 2.5 to 4.7%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.
- China accounted for 40% of all imports coming from DCs. China was followed by Turkey (36%), Ukraine (9.9%), India (9.3%) and Brazil (2.3%). Of the main DC suppliers, Turkey experienced the highest growth (+16% per year), followed by China (15%) and India (13%).
- The prices of imports (€1.4/kg) are lower than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €3.1/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 France's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**547**	**560**	**397**	**13.7**	**22.9**	**18.5**	**-7.7%**	**7.9%**	**4.7%**
construction pipes	23	33	26	5.0	7.4	6.1	2.8%	5.0%	23.7%
stainless steel cold processed	44	47	32	3.4	3.9	6.0	-7.7%	15.3%	18.7%
precision tubes	59	71	41	0.1	4.4	2.2	-8.5%	115.5%	5.4%
drill pipe for oil or gas	115	88	57	2.5	1.6	1.2	-16.1%	-16.8%	2.1%
iron or non-alloy steel, hot processed	85	104	62	0.6	2.2	0.9	-7.5%	11.2%	1.5%
iron or non-alloy steel, cold processed	47	39	44	0.2	0.4	0.5	-1.5%	31.9%	1.2%
stainless steel hot processed	30	9	4	0.3	0.5	0.5	-37.6%	7.7%	10.1%
alloy steel hot processed	61	64	51	0.0	1.5	0.4	-4.7%	93.4%	0.8%
alloy steel cold processed	27	36	32	0.1	0.2	0.3	3.7%	41.8%	1.0%
line pipe for oil or gas	48	60	39	1.3	0.5	0.3	-4.8%	-30.3%	0.8%
threaded gas pipe	7	10	8	0.1	0.3	0.0	1.0%	-25.2%	0.4%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in France or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- French Gas Association - http://www.afgaz.fr/uk/index.php - click on 'AFG', 'Presentation' and then on 'Members'.
- ABC Direct - http://www.abc-d.fr - type a keyword and search for companies.
- CFIA - http://www.cfiaexpo.com - food processing technology fair, annually in Rennes (March) and biennially in Metz (October).
- ESOPE (Chaudronnerie) - http://www.chaudronnerie-expo.com - pressure equipment fair, triennially (September/October), in Paris. The next event will be in 2013.
- Industrie Paris - http://www.industrie-expo.com - industrial design and production fair, annually (March), even years in Paris, odd years in Lyon.

- Midest - http://www.midest.com - annual industrial subcontracting fair (November), Paris.
- Pollutec - http://www.pollutec.com - environmental technology, annually in November, in Lyon (even year) and Paris (odd year).
- Provrac - http://www.provrac.com - online directory of French providers of equipment. Click on 'Pneumatic conveying', then 'pipes' for an overview of pipe suppliers.

Interesting players

Examples of interesting players are:

- Almet - http://www.almet-metal.com - pipe producer.
- Benteler Distribution - http://www.benteler-distribution.fr - distributes pipes and fittings.
- I.D. Tube - http://www.idtube.fr - distributes precision welded and seamless steel pipes.
- PLS France - http://www.pls-france.com - distributor of pipes.
- Salzgitter Mannesmann Precision - http://www.smp-tubes.fr - German producer of seamless tubes, with a production site in France.
- Sodime - http://www.e-sodime.com - distributor of rotary valves, fittings and pipes.
- Vallourec & Mannesmann Tubes - http://www.vmtubes.com - producer of seamless pips, also operates internationally.
- Van Leeuwen - http://www.vanleeuwen.com - Dutch pipe distributor in France.

France hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Assembly of French Chambers of Commerce and Industry - http://www.acfci.cci.fr.
- French Association of Enterprises in Mechanics and Electronics - http://www.ficime.fr.
- French Trade Association of Equipment Manufacturers for Construction, Infrastructures and Metallurgical Industries - http://www.cisma.fr.
- Hydroplus - http://www.hydroplus.info - water and wastewater magazine, 8 issues a year.
- Industrie et Technologies - http://www.industrie-technologies.com - online industry magazine, also offers a printed monthly version.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- L'Usine Nouvelle - http://www.usinenouvelle.com - weekly industrial magazine.
- La Revue de Metallurgie - http://www.revue-metallurgie.org - monthly metal magazine.
- Magazine Liquides - http://www.somia-editions.com/liquides - bimonthly liquids processing magazine.
- Matériaux et Techniques - http://www.mattech-journal.org - bimonthly trade magazine.
- Process Magazine - http://www.process-magazine.com - monthly issue on food processing.

Seamless pipes in Italy

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in Italy. Italy represents the third largest market for seamless pipes in the EU. Despite the recent decline in imports and market demand, Italian industrial output is expected to resume in 2011, and following that demand for seamless pipes.

Market characteristics

- Italy is a large market for seamless pipes in the EU. It is the third largest, behind France and Germany, but ahead of the UK and Poland. Apparent demand in 2009 totalled €511 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -8.2%. Refer to Table 1 for more information on the several types of products.

Table 1 Italian demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**720**	**1,511**	**511**	**-8.2%**
steel, hot finished	446	793	252	-13.3%
stainless steel	104	469	200	17.8%
steel, cold finished	141	204	48	-23.7%
steel, other	28	46	10	-22.3%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Like many countries in the EU, Italian industrial output has revived in 2011. Steel consuming industries that have contributed to this growth include mechanics, mechanical engineering and automotive sectors. In addition, demand for machinery and equipment in Italy showed steady growth throughout 2010 and at the beginning of 2011 leading to an upward trend in the market demand for seamless pipes.
- The Italian market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by continuously high investments in the gas and oil pipeline and power generation network.
- The crisis of the Italian construction industry is expected to continue throughout 2011. The new housing segment, in particular, has declined since 2008 (-3.7%), with the deepest decline in 2009 (-19%). Therefore, the low level of demand for seamless pipes in the Italian construction sector is expected to continue.
- Italy is a large producer of seamless pipes in the EU. It is the fourth largest, behind France and the UK, but ahead of Spain and Sweden. Production in 2009 amounted to €655 million, after an annual decline of 14% between 2005 and 2009. Examples of important Italian seamless pipe producers include Tenaris Dalmine (energy and industrial sectors) and Vallourec Italiana (part of the French Vallourec Group).
- As a result of a large drop in imports in 2009 (-54%), imports declined by 13% in the period 2006-2010, which was a higher decline than average development in the EU.

Imports amounted to €489 million in 2010. Imports from DCs totalled €58 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in the share (from 19 to 12%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.

- China accounted for 51% of all imports coming from DCs. China was followed by Ukraine (16%), India (12%), Argentina (11%), Mexico (5.6%), Belarus (1.4%) and Croatia (1.4%). Of the main DC suppliers, Belarus experienced the highest growth (+181% per year), followed by India (16%) and Turkey (5.0%).
- The prices of imports (€1.2/kg) are lower than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €1.5/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Italy's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	DC share in 2010
Total	**844**	**1,029**	**489**	**162.1**	**311.1**	**58.1**	**-12.7%**	**-22.6%**	**11.9%**
stainless steel cold processed	88	128	59	33.2	41.5	22.3	-9.7%	-9.5%	38.0%
line pipe for oil or gas	112	188	107	23.9	51.9	9.6	-1.2%	-20.5%	8.9%
drill pipe for oil or gas	51	86	22	12.9	52.2	9.0	-18.7%	-8.7%	40.1%
iron or non-alloy steel, hot processed	222	352	133	47.7	141.2	7.6	-12.1%	-36.8%	5.8%
threaded gas pipe	40	15	10	19.8	6.8	2.9	-29.7%	-38.2%	29.7%
alloy steel cold processed	13	25	21	0.3	2.0	2.1	13.5%	67.1%	9.7%
alloy steel hot processed	95	71	37	16.8	5.9	1.5	-20.8%	-45.3%	4.0%
precision tubes	66	90	37	1.8	7.4	1.5	-13.3%	-5.1%	3.9%
stainless steel hot processed	111	30	35	2.3	0.1	0.8	-25.2%	-22.8%	2.4%
construction pipes	21	17	9	1.3	1.3	0.8	-17.7%	-12.0%	8.5%
iron or non-alloy steel, cold processed	25	27	19	2.0	0.8	0.0	-6.6%	-62.8%	0.2%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Italy or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Federation of the Italian Associations of Mechanical and Engineering Industries - http://www.anima-it.com - choose the English language and click on 'members' directory'.
- Italian Association for Food Producing, Processing and Preservation Manufacturers - http://www.assofoodtec.it - click on 'associati e produzione' (associated production) and 'Elenco Aziende' (list companies).
- Italian Association of Valve and Fitting Manufacturers - http://www.associazioneavr.it - click on 'associati' (member) and on 'elenco associati' (member list).
- Accadueo - http://www.accadueo.com - (waste)water treatment technology and distribution trade fair, held every even year (May), in Ferrara.

- Geofluid - http://www.geofluid.it - trade fair for technology and equipment for prospecting, extracting and conveying underground fluids, held every even year (October), in Piacenza.
- Made in Steel - http://www.madeinsteel.it - steel fair, every odd year (March), Brescia.
- Sub-fornitura - http://www.senaf.it/fiera_eng.asp?fieraid=116 - subcontracting industrial processing trade fair, held annually (March) in Parma.

Interesting players

Examples of interesting players are:

- Bea Technologies - http://www.beafiltri.it - distributes seamless tubes.
- Fail - http://www.fail.it - distributor of pipes and fittings and other equipment.
- Internationally operating pipes and/or fittings producers in Italy include: Alessio Tubi - http://www.alessiotubi.it - pipes, part of Spain's Grupo Condesa; and Mannesmann DMV Stainless Italia - http://www.mannesmann-dmv.com - seamless stainless steel pipes.
- Jannone Tubi - http://jannonetubi.com - distributor of pipes.
- SMS Innse - http://www.innse.it - Italian subsidiary of SMS Siemag Group; producer of seamless pipes and other steel products.
- Steeltrade - http://www.steeltrade.it - distributes pipes, fittings and other equipment.
- Tenaris Dalmine - http://www.tenaris.com/Italy - one of the largest seamless pipes producers in the EU, headquartered in Italy.
- Tubi Acciaio Lombarda - http://www.tal.it - distributes pipes.

Italy hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Confederation of Italian industry - http://www.confindustria.it - represents more than 140,000 Italian manufacturing and services companies and associations.
- Italian Federation Of Agents And Commercial Representatives - http://www.fnaarc.it.
- Italian Petroleum Union - http://www.unionepetrolifera.it - association of oil companies operating in Italy.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- L'Ambiente - http://www.ranierieditore.it/ambiente.htm - bimonthly environmental technology magazine.
- Reti Idriche & Gas - http://www.pubblindustria.info - bimonthly water and gas magazine.
- Tecnologie del Filo - http://www.tecnichenuove.com/riviste/collane/tecnologie_del_filo.html - quarterly metal (pipes) magazine.

CBI
Ministry of Foreign Affairs of the Netherlands

Seamless pipes in the Netherlands

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in the Netherlands. It is the eighth largest market in EU. The share of imports from DCs in total import grew to 8.5% and reached €24 million in 2010.

Market characteristics

- The Netherlands is a medium-sized market for seamless pipes in the EU. It is the eighth largest, behind Spain and Belgium, but ahead of the Czech Republic and Austria. Apparent demand in 2009 totalled €78 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -12%. Refer to Table 1 for more information on the several types used in the Netherlands.

Table 1 Dutch demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**129**	**261**	**78**	**-11.7%**
steel, hot finished	41	75	35	-4.1%
steel, other	8	10	23	30.8%
steel, cold finished	18	34	16	-3.0%
stainless steel	62	143	5	-47.8%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Like many other EU countries, the Netherlands also experienced an increase in industrial production in 2010, after a steep decline in 2009. Towards the end of 2010, prodcution in the transport industry, as well as the electrical and machinery industries recorded an impressive growth. The upward trend is expected to continue, which will have a positive effect on the market demand for seamless pipes in related industries.
- On the other hand, the Dutch construction market faced a considerable downturn in 2010, especially the residential market, which affected market demand for seamless pipes in the construction sector.
- The Dutch market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will be the continuously high investments in the gas pipeline and power generation network. In addition, it should be noted that - despite it only being a small country - the Netherlands is home to one of the lengthiest pipeline networks in the EU.
- The Netherlands is a small producer of seamless pipes in the EU. It is the thirteenth largest, behind Slovakia and Poland, but ahead of Denmark and Ireland. Production in 2009 amounted to €51 million, after an annual decline of 18% between 2005 and 2009.
- As a result of a large drop in imports in 2009 (-33%), imports declined by 10% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €282 million in 2010. Imports from DCs totalled €24 million in

2010. They dropped more slowly than total imports in the period under review, which led to a growth in the share (from 6.5 to 8.5%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.

- China accounted for 84% of all imports coming from DCs. China was followed by Ukraine (8.6%), Congo (1.9%) and India (1.3%). Of the main DC suppliers, only China experienced growth (+6% per year).
- The prices of imports (€1.7/kg) are higher than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €1.2/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Netherlands' imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**432**	**391**	**282**	**27.9**	**41.6**	**24.0**	**-10.1%**	**-3.7%**	**8.5%**
line pipe for oil or gas	165	122	62	5.1	11.3	8.3	-21.7%	12.9%	13.4%
stainless steel cold processed	20	30	28	9.2	10.6	8.0	8.4%	-3.6%	28.5%
drill pipe for oil or gas	71	43	35	2.4	7.4	2.5	-16.3%	1.6%	7.4%
construction pipes	9	21	71	0.1	4.1	1.9	66.6%	97.8%	2.7%
iron or non-alloy steel, hot processed	60	72	39	0.9	1.1	1.8	-10.2%	20.4%	4.6%
stainless steel hot processed	64	26	7	8.8	0.6	0.6	-42.9%	-48.0%	9.4%
alloy steel hot processed	17	41	19	0.2	5.5	0.3	3.3%	8.8%	1.7%
precision tubes	21	31	18	0.1	0.4	0.3	-3.2%	38.1%	1.7%
iron or non-alloy steel, cold processed	3	3	2	0.9	0.2	0.1	-2.7%	-40.6%	4.6%
threaded gas pipe	1	0	0	0.2	0.1	0.1	-6.9%	-28.3%	13.6%
alloy steel cold processed	2	1	1	0.0	0.3	0.0	-26.3%	-23.5%	1.0%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the Netherlands or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abcdirect.nl - type a keyword and select the country.
- Association of Dutch Suppliers in the Oil and Gas Industry - http://www.iro.nl - Click on 'Oil & Gas Catalogue' and 'search a company'.
- Dutch Sector Association for the Water Treatment Industry - http://www.aquanederland.nl - click on 'leden' (members).

- Water Forum - http://www.waterforum.net - go to 'Marktwijzer' and search for 'Fittingen', for example.
- Aquatech - http://www.aquatechtrade.com/amsterdam - trade fair for the process, drinking and wastewater sectors, held every odd year (October) in Amsterdam.
- Fairs organised by Easyfairs - http://www.easyfairs.com - several relevant fairs, select 'Netherlands'.
- Industrial Processing - http://www.industrialprocessing.nl - process equipment trade fair, held every even year in October in Utrecht.
- Industry and Environment (Industrie & Milieu) - http://www.easyfairs.com - water, waste and energy trade fair, held annually (May) in Rotterdam.
- Stainless Steel World - http://www.stainless-steel-world.net - steel industry trade fair, biennially (odd years in November) in Maastricht.

Interesting players

Examples of interesting players are:

- Buhlmann Tube Solutions - http://www.buhlmann.nl - German distributor of steel pipes and fittings; also operates in the Netherlands.
- Corus - http://www.corus.com - producer of welded steel pipe. Corus is part of India's Tata Steel Group, one of the world's largest steel producers.
- Dylan Group - http://www.dylangroup.com - international distributor of pipes, fittings and flanges, headquartered in the Netherlands.
- Paul Meijering Metaal - http://www.paulmeijering.nl - imports/exports steel pipes and components, including seamless pipes.
- Snel Staal - http://www.snelstaal.nl - sourcing agent of seamless pipes.
- Teham Pongers - http://www.teham-pongers.nl - distributor of steel products, including seamless pipes.
- Thyssen Krupp - http://www.tkmn.nl - German producer of steel pipes and components, with a sales office and warehouse in the Netherlands.
- VAM Drilling - http://www.vamservices.com - produces drill pipes; part of the French Vallourec Group.
- Van Leeuwen Pipe and Tube Group - http://www.vanleeuwen.com - distributor.

The Netherlands hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Dutch Association of steel manufacturing - http://www.metaalunie.nl.
- Dutch Oil and Gas Exploration and Production Association - http://www.nogepa.nl.
- Holland Marine Equipment Association - http://www.hme.nl.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Netherlands Water Partnership - http://www.nwp.nl - provides reports on the Dutch water industry; go to "Over NWP" (About NWP), then "Publicaties" (Publications).
- Netherlands Petroleum Industry Association - http://www.vnpi.nl - contains facts and figures on the Dutch oil industry.
- Chemisch2Weekblad - http://www.c2w.nl - biweekly chemical magazine.
- Fluids Processing - http://www.fluidsprocessing.nl - bimonthly trade magazine.
- Industrial Maintenance - http://www.industrialmaintenance-vakblad.nl - monthly industrial magazine.
- RoestvaSTaal - http://www.uitgeverijtcm.nl/actueel.asp - industrial news update.

Seamless pipes in Romania

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in Romania. It is the fourteenth largest market in the EU. During 2005-2009, the market recorded an annual average growth of 8.5%. Being a new EU member, the Romanian industrial sector will need to upgrade their processes to match the quality standards in the Western European market. This will stimulate market demand for seamless pipes.

Market characteristics

- Romania is a medium-sized market for seamless pipes in the EU. It is the fourteenth largest, behind Finland and Slovakia, but ahead of Ireland and Hungary. Apparent demand in 2009 totalled €88 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 8.5%. Refer to Table 1 for more information on the several types of products used in Romania.

Table 1 Romanian demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**63**	**118**	**88**	**8.5%**
steel, other	26	30	36	9.0%
steel, cold finished	7	32	24	33.7%
steel, hot finished	17	42	14	-4.0%
stainless steel	13	13	13	0.0%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Romanian market has an immature character and a relatively large part of it consists of new installations. In particular, the food and water industries are still developing. In the water industry, for example, several investments are still expected in the water collection and distribution and sewer networks so as to comply with the EU Water Directives by 2015.
- The Romanian economy is expected to grow around 5.0% in 2011, which represents one of the highest in the EU. Nevertheless, market prospects on the Romanian seamless pipe market are likely to be offset by the slowdown in the construction sector. After several years of good growth between 2000-2008, the country's construction sector has declined for the past two years (around 14% in 2009 and a further 10% in 2010).
- Romania is a small producer of seamless pipes in the EU. It is the tenth largest, behind Austria and Belgium, but ahead of Slovakia and Poland. Production in 2009 amounted to €97 million, after an annual decline of 25% between 2005 and 2009. The country

hosts a number of foreign producers, including Tenaris (from Italy), who has a production facility in Romania.

- Despite a large drop in imports in 2009 (-45%), imports grew by 12% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €120 million in 2010. Imports from DCs totalled €8.5 million in 2010. Contrary to total imports, the development of DC imports was negative in the period under review, which led to a decrease in the share (from 21 to 7.0%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.
- China accounted for 29% of all imports coming from DCs. China was followed by Turkey (28%), Ukraine (15%), Argentina (9.9%), Belarus (9.1%), Libya (7.0%) and Croatia (1.4%). Of the main DC suppliers, only China experienced growth (+9.0% per year).
- The prices of imports (€2.1/kg) are higher than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €1.6/kg in 2010 (€1.3/kg in the EU). Price remains very important in this country, as in other Central and Eastern European countries. A first selection is often based on price.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Romania's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**77**	**171**	**120**	**16.2**	**48.1**	**8.5**	**11.6%**	**-15.1%**	**7.0%**
drill pipe for oil or gas	8	60	20	5.0	32.6	2.4	23.7%	-17.1%	12.0%
iron or non-alloy steel, hot processed	21	14	13	1.8	2.8	2.2	-11.6%	5.2%	17.6%
stainless steel cold processed	4	5	7	0.6	1.3	1.7	18.9%	29.1%	23.4%
precision tubes	3	9	13	0.2	2.2	0.8	40.6%	35.8%	6.4%
construction pipes	14	24	22	4.7	0.5	0.4	12.7%	-44.9%	2.0%
iron or non-alloy steel, cold processed	5	18	24	0.9	1.1	0.4	49.9%	-17.1%	1.7%
alloy steel cold processed	7	7	5	0.3	0.1	0.3	-6.3%	1.4%	5.0%
line pipe for oil or gas	7	12	10	1.3	4.5	0.1	10.3%	-42.0%	1.5%
alloy steel hot processed	3	14	6	0.3	0.1	0.1	19.4%	-30.7%	1.3%
stainless steel hot processed	4	3	0	0.6	2.4	0.0	-51.9%	-90.1%	0.0%
threaded gas pipe	2	4	1	0.5	0.6	0.0	-25.7%	-93.2%	0.0%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Romania or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Doing Business in Romania - http://mcir.doingbusiness.ro - browse companies by industry.
- InfoCompanies Romania - http://www.infocompanies.com - Romanian online directory; click on 'Industrial' or on 'Machinery'.
- Romanian Trade Promotion Centre - http://tpb.traderom.ro - click on 'Trade promotion center', 'Virtual exhibitions' and 'Companies'.
- Romanian Water Association - http://www.ara.ro - click on 'Membrii' (members).

- Bucharest International Technical Fair - http://www.tib.ro - technical trade fair, held annually (October) in Bucharest.
- ExpoApa - http://www.araexpoapa.ro - exhibition for (waste)water treatment, held annually (June), in Bucharest.
- Renexpo - http://www.renexpo.ro - energy fair, held annually (November) in Bucharest.
- Romtherm - http://www.romtherm.ro - heating and cooling fair, annually (May) in Bucharest.

Interesting players

Examples of interesting players are:

- Baurom Construct - http://www.baurom.ro - distributor of pipes.
- Er Metal - http://www.ermetal.ro - trader of seamless steel pipes by hot rolling and cold drawing.
- Klöckner Romania - http://www.kloeckner.ro - distributor of steel and metal products, including seamless pipes, headquartered in Germany.
- Mairon - http://www.mairon.ro - distributor of metallurgical products, including seamless steel pipes.
- TMK Artrom - http://www.artrom.ro - producer of seamless pipes.
- Tube Distribution - http://www.tubedistribution.ro - distributor of pipes.
- Tubomet - http://www.tubomet.ro - producer of pipes.
- Vastrum Transcom - http://www.vastrum.ro - distributor of pipes.

Romania hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Business Day - http://www.businessday.ro - online economic and business news.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Romanian Chamber of Commerce and Industry - http://www.ccir.ro.

Seamless pipes in Spain

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in Spain. It is the sixth largest market in the EU. The market has recently experienced upheaval, but DC exporters should not be discouraged.

Market characteristics

- Spain is a medium-sized market for seamless pipes in the EU. It is the sixth largest, behind the UK and Poland, but ahead of Belgium and the Netherlands. Apparent demand in 2009 reached €150 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was around -23%. Refer to Table 1 for more information on the several types of seamless pipes used in Spain.

Table 1 Spanish demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**435**	**576**	**150**	**-23.3%**
steel, hot finished	154	211	70	-18.0%
stainless steel	246	280	44	-34.9%
steel, cold finished	34	40	19	-13.4%
steel, other	2	45	18	81.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Spanish economy continued to suffer in 2010 with a GDP decline of 0.4%, after a decline of 3.7% in 2009. Significant economic improvement is unlikely in 2011.The Spanish construction industry was one of the first to feel the effects of the economic crisis in 2008. The collapse of the domestic construction market continued into 2010. Together with high levels of public debts, the pace of economic and construction sector recovery is expected to be slow.
- The market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by continuously high investments in the gas pipeline and power generation network.
- Spain is a medium-sized producer of seamless pipes in the EU. It is the fifth largest, behind the UK and Italy, but ahead of Sweden and Czech Republic. Production in 2009 amounted to €520 million, after an annual decline of 9.0% between 2005 and 2009.
- As a result of a drop in imports in 2009 (-46%) and 2010 (-6.9%), imports declined by 7.5% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €171 million in 2010. Imports from DCs totalled €22 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in the share (from 20 to 13%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.
- China accounted for 72% of all imports coming from DCs. China was followed by Ukraine (7.2%), Croatia (6.0%), Morocco (5.3%), India (4.1%), Argentina (2.9%) and Belarus (1.8%). There were no DC countries that experienced growth in the period under review.

- The prices of imports (€1.3/kg) are lower than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €1.2/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Spain's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**233**	**340**	**171**	**46.6**	**82.2**	**21.9**	**-7.5%**	**-17.1%**	**12.8%**
stainless steel cold processed	23	35	20	6.7	9.2	6.8	-3.5%	0.5%	34.8%
line pipe for oil or gas	24	77	29	2.8	23.0	6.7	5.2%	23.9%	22.7%
threaded gas pipe	17	13	14	13.2	3.5	4.0	-4.5%	-25.8%	28.8%
iron or non-alloy steel, hot processed	67	103	48	8.1	21.1	1.4	-8.1%	-35.3%	3.0%
drill pipe for oil or gas	10	14	19	0.2	5.9	0.8	16.1%	45.5%	4.3%
iron or non-alloy steel, cold processed	8	24	8	1.4	9.5	0.8	0.4%	-13.6%	9.3%
alloy steel cold processed	5	7	5	0.3	0.9	0.7	2.2%	21.0%	12.7%
alloy steel hot processed	24	30	5	10.0	6.7	0.6	-32.4%	-51.4%	11.0%
construction pipes	18	16	4	0.4	0.3	0.1	-29.2%	-34.1%	1.9%
stainless steel hot processed	23	3	5	2.9	1.2	0.1	-29.9%	-60.6%	1.3%
precision tubes	15	17	12	0.6	1.0	0.0	-4.2%	-47.0%	0.4%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Spain or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Barcelona Tecnologías de la Alimentación - http://www.bta-tecnoalimentaria.com - trade fair for the food industry, every four years; the next fair will be held in May 2012.
- Industry and Technology Summit - http://www.bilbaoexhibitioncentre.com - iron and steel trade fair, biennially (uneven years in September) in Bilbao.
- Maquitec - http://www.maquitec.com - trade fair for equipment, technology, production processes in the metallurgy industry, held every odd year (March) in Barcelona.
- PROMA - http://www.bilbaoexhibitioncentre.com - environmental technologies trade fair, held biennially (even years in October) in Bilbao.
- Smagua - http://www.smagua.com - water treatment fair, held biennially (even years in March) in Zaragoza.
- Spanish Association of Capital Goods Manufacturers - http://www.sercobe.es - choose 'English' and click on 'Members'.
- Spanish Association of Fluid Handling Equipment Exporters (FLUIDEX) - http://www.fluidex.es - click on 'Empresas Asociadas' for members.
- Spanish Association of Iron Merchants - http://www.uahe.es - click on 'Asociados' (partners) and view members by province.

- Spanish Gas Association - http://www.sedigas.es - click on ‘Asociación’, then ‘Empresas Asociadas’, and ‘Otras empresas’ for potential trading partners.
- Spanish Metallurgy Union - http://www.unesid.org - click on ‘English’ and go to ‘UNESID Company Members’.
- Subcontratación - www.bilbaoexhibitioncentre.com - in ‘Fairs’, select ‘Subcontratación’; annual subcontracting fair (September) in Bilbao.

Interesting players

Examples of interesting players are:

- Gual - http://www.gual.es - distributor of stainless steel pipes.
- Tubacex - http://www.tubacex.com - one of the largest stainless steel pipes producers, including seamless stainless steel pipes.
- Tubos Reunidos - http://www.tubosreunidos.com - producer of seamless pipes.
- Peninsular - http://www.peninsulardevastagos.es - distributor of precision pipes.
- Productos Tubulares - http://www.productostubulares.es - producer of seamless pipes.
- Global Metal Aceros - http://www.globalmetal.es - importer, exporter and distributor of pipes.

Spain hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

CBI
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Seamless pipes in the UK

This CBI fact sheet aims to introduce seamless pipes suppliers from developing countries (DCs) to the seamless pipes market in the UK. The UK represents a large market for seamless pipes, ranking fourth in the EU. Despite economic turmoil and recession in the construction sector, the UK's market for seamless pipes experienced an annual average market growth of around 6.9% during 2005-2009.

Market characteristics

- The UK is a large market for seamless pipes in the EU. It is the fourth largest, behind Germany and Italy, but ahead of Poland and Spain. Apparent demand in 2009 totalled €817 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 6.9%. Refer to Table 1 for more information on the several types of seamless pipes used in the UK.

Table 1 UK demand for seamless pipes, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**625**	**1,553**	**817**	**6.9%**
steel, other	25	705	505	112.1%
steel, cold finished	88	128	132	10.8%
stainless steel	129	156	122	-1.3%
steel, hot finished	383	565	58	-37.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Like many countries in the EU, the UK's construction sector declined between 2008-2010. The sector's growth is forecasted to be slow, with around 1.5-2.0% growth each year during 2010-2014.
- The UK market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will remain the high investments in the gas distribution network, water distribution and wastewater treatment.
- The UK is a large producer of seamless pipes in the EU. It is the third largest, behind Germany and France, but ahead of Italy and Spain. Production amounted to €770 million in 2009, after an annual growth of 6.5%. VOMG UK (part of the French Vallourec Group) is the largest producer of seamless line pipe for oil and gas to the North Sea Oil and Gas industry in the UK.
- As a result of a large drop in imports in 2009 (-20%), imports declined by 7.1% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €497 million in 2010. Imports from DCs totalled €44 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in the share (from 12 to 8.8%). Table 2 shows the size, growth and share of seamless pipes imports from DCs per type.
- China accounted for 41% of all imports coming from DCs. China was followed by Mexico (14%), Turkey (11%), Argentina (7.9%), South Africa (6.7%), India (6.7%) and Ukraine (4.1%). Of the main DC suppliers, Egypt experienced the highest growth (+89% per year), followed by Turkey (82%), Malaysia (46%), Tunisia (44%), China (23%) and Ukraine (11%).

- The prices of imports (€2.2/kg) are a little bit higher than the average import price in the EU (€1.6/kg in 2010). The average price of imports from DCs (excl. China) was €2.0/kg in 2010 (€1.3/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 UK's imports: size, growth and share of seamless pipes from DCs, by type, 2006 - 2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**667**	**598**	**497**	**78.0**	**84.2**	**43.9**	**-7.1%**	**-13.4%**	**8.8%**
drill pipe for oil or gas	317	258	225	54.0	25.7	14.1	-8.2%	-28.5%	6.3%
alloy steel hot processed	18	38	31	0.1	4.4	8.2	14.0%	192.8%	26.8%
stainless steel cold processed	50	65	46	4.6	8.0	6.9	-1.9%	10.6%	15.1%
line pipe for oil or gas	120	83	97	8.2	18.5	5.5	-5.1%	-9.7%	5.6%
iron or non-alloy steel, cold processed	9	9	15	0.6	2.7	4.5	12.4%	67.8%	30.1%
precision tubes	32	33	21	2.2	8.7	2.9	-10.0%	7.4%	13.8%
construction pipes	11	21	15	1.8	1.6	1.0	7.6%	-14.5%	6.3%
iron or non-alloy steel, hot processed	56	70	30	2.2	9.7	0.4	-14.4%	-36.4%	1.2%
stainless steel hot processed	45	8	6	1.9	0.2	0.3	-40.4%	-34.9%	6.1%
threaded gas pipe	1	3	2	0.0	0.2	0.1	21.5%	121.6%	3.6%
alloy steel cold processed	8	10	9	2.4	4.5	0.1	3.4%	-58.6%	0.8%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of seamless pipes), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the UK or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Applegate directory - http://www.applegate.co.uk - search by 'Products & Services'.
- Hotfrog - http://www.hotfroguk.co.uk - company database.
- Pipeline Industries Guild - http://www.pipeguild.com - go to 'membership' and 'organisation member directory'.
- Process and Control today - http://www.pandct.com - search by 'supplier', 'product' or 'product area'.
- Society of British Gas Industries - http://www.sbgi.org.uk - go to 'membership' and select 'member directory'.
- UK upstream and downstream of the oil and gas industry - https://www.og.decc.gov.uk - go to 'about us', then click on 'oil and gas contacts'.
- IWEX-Water - http://www.sustainabilitylive.com - trade fair for the water and wastewater treatment sector, held biennially (uneven years around April and May) in Birmingham.
- Offshore Europe - http://www.offshore-europe.co.uk - oil and gas fair, biennially (odd years in September) in Aberdeen.
- PPMA Show - http://www.ppmashow.co.uk - process equipment fair, odd years (September/October) in Birmingham.
- Subcon - http://www.subconshow.co.uk - subcontracting manufacturing trade fair,

held annually (May or June) in Birmingham.

- Total Processing & Packaging - http://www.totalexhibition.com - process engineering equipment fair, triennially (May) in Birmingham. The next event will be held in 2013.

Interesting players

Examples of interesting players are:

- Carrs Stainless Steels - http://www.elgcarrs.co.uk - producer of seamless pipes.
- Chemipetro Limited - http://www.chemipetro.co.uk - stockholding distributor.
- Full Supply - http://www.fullsupply.co.uk - distributor of pipes.
- Global Pipe Components - http://www.globalpipecomponents.co.uk - stockholding distributor of pipes, fittings and flanges.
- Hygienic Stainless Steels - http://www.hss-ltd.co.uk - stockholding distributor.
- Masteel - http://www.masteel.co.uk - distributor of pipes.
- Special Piping Materials - http://www.spm.co.uk - stockholding distributor.
- Warefield UK Suppliers - http://www.warefield.co.uk - stockholding distributor.

The UK hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Steel Construction - http://www.steelconstruction.org.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Petroleum Industry Association - http://www.ukpia.com/home.aspx - news, industry issues and information on refineries.
- Process Engineering - http://www.centaur.co.uk - monthly engineering magazine.
- The Engineer - http://www.theengineer.co.uk - biweekly engineering magazine.
- Tubenet - http://www.tubenet.org.uk - company information and pipe news.
- UK offshore Operators Association - http://www.ukooa.co.uk - industry issues and events in the oil and gas industry.

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Level indicators in the Czech Republic

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the level indicator market in the Czech Republic. It is the second largest market in Central and Eastern Europe and it imported €23 million of level indicators from DCs during 2005-2009. Although current imports from DCs only come from China, the market offers interesting opportunities for DC exporters who can fulfil product requirements and deliver at competitive prices.

Market characteristics

- The Czech Republic is a medium-sized market for level indicators in the EU. It is the eighth largest, behind Sweden and Belgium, but ahead of the Netherlands and the UK. Apparent demand in 2009 totalled €6.1 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 5.2%.
- As level indicators are crucial instruments relating to plant safety, buyers tend to look for a high level of accuracy and reliability, and mostly choose well-known quality brands from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands (although the Central and Eastern European market is more receptive to new brands than other European markets). A more advisable mode of market entry is via subcontracting to local manufacturers.
- Level indicators in the Central and Eastern European market are less advanced than those in the Western European market. Opportunities for DC exporters lie in the simple product segment, where an affordable price is important and quality requirements are less high than in other segments. This includes, for example, tubular, magnetic or reflection level gauges, used in water treatment tanks.
- The Czech Republic is a large producer of level indicators in the EU. It is the second largest, behind Germany, but ahead of Italy and the UK. Production in 2009 amounted to €49 million, after an annual decline of 1.0% between 2005 and 2009.
- Despite a drop in imports of more than 20% in 2009, imports grew by 3.4% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €7.0 million in 2010. Imports from DCs totalled €1.1 million in 2010. Contrary to total imports, the development of DC imports was negative in the period under review, which led to a decrease in the share (from 46 to 16%).
- China accounted for 100% of all imports coming from DCs. China experienced a decline of 20% in exports to the Czech Republic in the period under review.
- The prices of imports (€21/kg) are relatively low compared to the average import price in the EU (€39/kg in 2010). The average price of imports from DCs (excl. China) was €25/kg in 2010 (€18.9/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the Czech Republic or leading EU trade fairs in other EU countries (such as Achema in Frankfurt, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- European Databank - http://www.edb.cz - Czech company databank.
- Wer liefert was? - http://www.wlw.cz - online trade directory. Search by product name.
- Aqua Set - http://www.aquaset.cz - water treatment trade fair, held annually (March) in Prague.
- Envibrno & Vodovody-Kanalizace - http://www.bvv.cz/envibrno-gb - trade fair for water and wastewater treatment, held annually (May) in Brno.
- For Industry - http://www.forindustry.cz - engineering fair, held annually (April) in Prague.
- MSV - http://www.bvv.cz/msv-gb - process engineering fair, held in Brno every September.
- Trade Fairs Brno - http://www.bvv.cz - find an overview of all trade fairs in Brno.

Interesting players

Examples of interesting players are:

- Apoelmos - http://www.apoelmos.cz - producer of measurement and control technique.
- BHV Senzory - http://www.bhvsenzory.cz - producer and distributor of instruments, including water level measurement.
- Elis Plzen - http://www.elis.cz - producer of ultrasonic level meter of liquid.
- Endress + Hauser - http://www.cz.endress.com - Swiss producer of industrial measurement equipment, with a production facility in the Czech Republic.
- MM Group - http://www.mmgroup.cz - producer of level measuring equipment for the process industry.
- NPK Europe - http://www.npke.cz - producer.
- Pemit - http://www.pemit.cz - producer of measurement and control equipment.

The Czech Republic hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Czech Business Weekly - http://www.cbw.cz - weekly general business magazine.
- Czech Gas Union (CPU) - http://www.cpu.cz - gas association.
- Czech Statistical Office - http://www.czso.cz - facts and figures on the Czech industry.
- Gas - http://www.cgoa.cz/en/gas-magazine/on-gas.ep - monthly gas magazine.
- Konstrukce - http://www.konstrukce.cz - bimonthly engineering magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- TBZ Info - http://www.tzb-info.cz - portal with information focused on construction, energy conservation and other related fields.

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Level indicators in Denmark

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the instrument market in Denmark. It is the twelfth largest market in the EU. Opportunities for DC exporters lie in the simple level indicator segment, where quality requirements are not high and the purchasing decision is based primarily on price.

Market characteristics

- Denmark is a small market for level indicators in the EU. It is the twelfth largest, behind the UK and Finland, but ahead of Austria and Romania. Apparent demand in 2009 totalled €3.7 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 15%.
- The Danish level indicator market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- Like elsewhere in the EU, the Danish market relies heavily on well-known quality brands for level indicators for both new and replacement products. As level indicators are crucial instruments related to plant safety, Danish buyers tend to look for a high level of accuracy and reliability, and mostly choose products from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands. It is advisable to enter the market via subcontracting to local manufacturers. In general, the Danish instrumentation market is dominated by multinational producers.
- Level measurement products/solutions in the Danish market are very diverse and are usually more technologically advanced than those in Central and Eastern Europe and DCs, especially in the petrochemical sector. Product trends are developing towards level indicators that can also measure other parameters, such as temperature, chemical substance, etc. In the case of highly technical level indicators Danish buyers usually base their purchasing decision on the relation between the most economical and best technical solutions. When it comes to simple level indicators their decision is mainly based on costs.
- As level indicators from DCs are much less advanced than those in the Western European market, opportunities for DC exporters lie in the simpler product segment, where affordable price is important and quality requirements are not high. This includes, for example, tubular, magnetic or reflection level gauges used in water treatment tanks.
- Wireless technologies continue to be a very important product attribute as they enable wireless data transmission, remote working, faster access to data, and in many cases, also result in increased efficiency and faster returns on investment. Increasingly, products related to wireless technology are appearing on the market, such as wireless tank gauging, data logger (integrated in a level measurement instrument) and related modules and PC software.

- Denmark is a small producer of level indicators in the EU. It is the fourteenth largest, behind Luxemburg and Poland, but ahead of Romania and Portugal. Production in 2009 amounted to €1.6 million, after an annual growth of 7.9% between 2005 and 2009.
- In the period 2006-2010 imports grew by 4.5% per year on average, which was contrary to average development in the EU. Imports amounted to €4.0 million in 2010. Imports from DCs totalled €0.1 million in 2010. Contrary to total imports, the development of DC imports was negative in the period under review, which led to a decrease in the share (from 3.5 to 1.5%).
- China accounted for 67% of all imports coming from DCs. China was followed by India (21%), Croatia (8.9%), Mauritania (1.2%) and Saudi Arabia (0.9%).
- The prices of imports (€65/kg) are relatively high compared to the average import price in the EU (€39/kg in 2010). There are no details available on the average price of imports from DCs.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Denmark or leading EU trade fairs in other EU countries (such as Achema in Frankfurt, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Automatik - http://automatik10.dk - (industrial) automation process trade fair held every even year (September) in Copenhagen.
- Danish chamber of commerce - http://www.danskerhverv.com - industry news, events and the chamber can assist your company in finding a potential Danish business partner.
- Danish energy industries federation - http://www.ei.di.dk - networking and matchmaking.
- Danish petroleum industry association - http://www.oil-forum.dk - click on ‘Om EOF’ (About EOF), and click on ‘Medlemmer’ (members).
- Danish water forum - http://www.danishwaterforum.dk - click on ‘Members’ and on ‘Manufacturers’ for a list of companies active in the Danish water technology sector.
- HI Industri - http://www.hi-industri.dk - industry trade fair, held every odd year (September) in Herning.
- MCH - http://www.hi11.dk - industry trade exhibition, held every odd year (September) in Herning. It also covers the process automation sector.
- VandTek - http://www.vandtek.dk - trade fair for the water and wastewater treatment industry, in Odense. It was last held in 2009 and will be held again in November 2012.

Interesting players

Examples of interesting players are:

- Cogétil Scandinavia - http://www.cogetil.com - distributor.
- Danova - http://www.danova.dk - distributor of level indicators.
- Emco Controls - http://www.emco.dk - producer of level indicators.
- Fagerberg - http://www.fagerberg.dk - distributor of instruments.
- Granzow - http://www.granzow.dk - distributor of instruments.
- MJK Automation - http://www.mjk.dk - producer of instruments.
- Tech - http://www.tech.dk - distributor of instruments.

- Tempress - http://www.tempress.dk - producer of level measuring equipment for the processing industry.

Denmark hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Danish Energy Companies - http://www.danishenergyassociation.com - energy sector representative, among others publishing the biweekly magazine 'El & Energi'.
- Confederation of Danish Industries (DI) - http://www.di.dk - industry news and events.
- Danish District Heating Association - http://www.dff.dk.
- Danish Water and Waste Water Association (DANVA) - http://www.danva.dk - assists in information and business partner matchmaking.
- Dansk Teknisk Tidsskrift - http://www.teknisk.dk - technical magazine.
- Ingeniøren - http://ing.dk - weekly magazine on science and technology.
- Jern- og Maskinindustrien - http://www.jernindustri.dk - online technical magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Maskin Aktuelt - http://www.techmedia.dk - magazine in English, eight times a year.
- Proces-Teknik - http://www.proces-teknik.dk - monthly process magazine.
- Teknisk Nyt (Tech News) - http://www.techmedia.dk - magazine for the mechanical engineering and process industries, published in English 15 times a year.

Level indicators in Germany

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the German market for level indicators. Germany represents the EU's largest market for level indicators. Imports from DCs showed a positive growth during 2006-2010, which resulted in an increase in the share of DC imports in total import. Opportunities for DC exporters lie in the simple level indicator segment, where quality requirements are not high and purchasing decision is based primarily on price.

Market characteristics

- Germany is the largest market for level indicators in the EU, ahead of France and Italy. Apparent demand in 2009 totalled €46 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -14%.
- Like elsewhere in the EU, the German market relies heavily on well-known quality brands for level indicators for both new and replacement products. As level indicators are crucial instruments related to plant safety, German buyers tend to look for a high level of accuracy and reliability, and mostly choose products from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands. It is advisable to enter the market via subcontracting to local manufacturers. In general, the German instrumentation market is dominated by multinational producers.
- Level measurement products/solutions in the German market are very diverse and are usually more technologically advanced than those in Central and Eastern Europe and DCs, especially in the petrochemical sector. Product trends are developing towards level indicators that can also measure other parameters, such as temperature, chemical substance, etc. In the case of highly technical level indicators German buyers usually base their purchasing decision on the relation between the most economical and best technical solutions. When it comes to simple level indicators they base their decision mainly on costs.
- As level indicators from DCs are much less advanced than those in the Western European market, opportunities for DC exporters lie in the simpler product segment, where affordable price is important and quality requirements are not high. This includes, for example, tubular, magnetic or reflection level gauges used in water treatment tanks.
- Wireless technologies continue to be a very important product attribute as they enable wireless data transmission, remote working, faster access to data, and in many cases, also result in increased efficiency and faster returns on investment. Increasingly, products related to wireless technology are appearing on the market, such as wireless tank gauging, data logger (integrated in a level measurement instrument) and related modules and PC software.
- Germany is the largest producer of level indicators in the EU, ahead of the Czech Republic and Italy. Production in 2009 amounted to €96 million, after an annual decline of 1.0% between 2005 and 2009.

- Germany is one of the EU's technology leaders in level measurement and solutions, and is home to some of the world's renowned producers of level indicators, including Krohne, VEGA Grieshaber and Emerson Process Management, as well as several domestic small- to medium-sized producers. Many foreign producers of level indicators have also established a strong foothold in Germany, including Endress + Hauser (Switzerland).
- As a result of a large drop in imports in 2009 (30%), imports declined by 1.4% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €32 million in 2010. Imports from DCs totalled €3.1 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 6.6 to 9.5%).
- China accounted for 41% of all imports coming from DCs. China was followed by Tunisia (15%), Malaysia (10%), Mexico (8.3%) and India (7.8%). Of the main DC suppliers, Mexico experienced the highest growth (+43% per year), followed by China (13%).
- The prices of imports (€52/kg) are higher than the average import price in the EU (€39/kg in 2010). The average price of imports from DCs (excl. China) was €38/kg in 2010 (€18.9/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Achema - http://www.achema.de - process industry fair, triennially (June) in Frankfurt. Next event in 2012. Exhibitor catalogue - http://woice-content2.dechema.de.
- Association of German Engineering - http://www.vdma.com - go to 'VDMA Association' and click on 'Member Companies'.
- Association of Steam Boiler, Pressure Vessel and Piping Manufacturers - http://www.fdbr.de - click on 'Mitglieder'.
- Association of the German Petroleum Industry - http://www.mwv.de - news and statistics. go to 'Über uns' and click on 'Mitglieder' for a list of members.
- Chemi.de - http://www.chemie.de - trade directory. Type product name in the search cell.
- Federal Association of the German Gas and Water Industry - http://www.bdew.de - click on 'BDEW', then 'Mitgliederübersicht' (members overview).
- German Water Partnership - http://www.germanwaterpartnership.de - go to 'About us' and click on 'Members & Partners'.
- Hannover Messe - http://www.hannovermesse.de - industrial automation fair, annually held in Hannover (April).
- Ifat Entsorga - http://www.ifat.de - biennial trade fair (even years) for water, sewage, waste and raw materials management, Munich, September.
- MSR Spezialmessen - http://www.meorga.de - annual trade fair for process control systems, instrumentation, control and control technology. The fair is held four times a year in Halle (March), Hamburg (May), Landshut (September), and Braunschweig (November).
- Wasser Berlin International - http://www.wasser-berlin.com - water and gas fair, triennially (May) in Berlin.
- Wer liefert was? - http://www.wlw.de - German company database.

- Zuliefermesse - http://www.zuliefermesse.de - subcontracting trade fair, annually (March) in Leipzig.

Interesting players

Examples of interesting players are:

- Afriso Euro Index - http://www.afriso.de - producer of tank level indicator.
- Beso - http://www.besi.de - produces tank level gauging and draft measurement.
- Conatex - http://www.conatex.de - manufacturer of instruments, including level and flow measurement devices.
- Dynisco - http://www.dynisco.de - distributes instruments.
- Endress + Hauser - http://www.endress.com - Swiss producer of industrial measurement equipment, with a production facility in Germany.
- Industrielle Messtechnik - http://www.imbmesstechnik.de - producer.
- Jumo - http://www.jumo.net - producer.
- Krohne - http://www.krohne.com - large German producer of process measurement equipment.
- Pepperl + Fuchs - http://www.pepperl-fuchs.de - producer of process automation equipment, including level measurement. The company has worldwide production facilities in Germany, the U.S., Hungary, Indonesia and Vietnam.
- Sentracon - http://www.sentracon.de - manufactures instruments, including level measurement in pressure-free tanks.
- Stübbe - http://www.asv-stuebbe.de - produces instrument, pipes and valves.
- Tablar Messtechnik - http://www.tablar.com - distributes instruments.
- UWT Level Control - http://www.uwt.de - produces level detection and measurement systems for both liquids and solids.
- Vega - http://www.vega.com - producer of measuring instruments; operating internationally.
- Wika - http://www.wika.de - producer of instruments.

Germany hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of German Engineers - http://www.vdi.de - provides engineering guidelines.
- Chemie Technik - http://www.chemietechnik.de - monthly chemical processing magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process - http://www.process.vogel.de - online industrial magazine for the process industry.

Level indicators in the Netherlands

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the level indicator market in the Netherlands. It is the ninth largest market in the EU. During 2006-2010, the total Dutch import of level indicators showed a positive growth. At the same time, the share of level indicator imports specifically from DCs increased to 7.9%.

Market characteristics

- The Netherlands is a small market for level indicators in the EU. It is the ninth largest, behind Belgium and the Czech Republic, but ahead of the UK and Finland. Apparent demand in 2009 totalled €0.8 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -2.5%.
- The Dutch level indicator market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- Like elsewhere in the EU, the Dutch market relies heavily on well-known quality brands for level indicators for both new and replacement products. As level indicators are crucial instruments related to plant safety, Dutch buyers tend to look for a high level of accuracy and reliability, and mostly choose products from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands. It is advisable to enter the market via subcontracting to local manufacturers. In general, the Dutch instrumentation market is dominated by multinational producers.
- Level measurement products/solutions in the Dutch market are very diverse and are usually more technologically advanced than those in Central and Eastern Europe and DCs, especially in the petrochemical sector. Product trends are developing towards level indicators that can also measure other parameters, such as temperature, chemical substance, etc. In the case of highly technical level indicators Dutch buyers usually base their purchasing decision on the relation between the most economical and best technical solutions. When it comes to simple level indicators they base their decision mainly on costs.
- As level indicators from DCs are much less advanced than those in the Western European market, opportunities for DC exporters lie in the simpler product segment, where affordable price is important and quality requirements are not high. This includes, for example, tubular, magnetic or reflection level gauges used in water treatment tanks.
- Wireless technologies continue to be a very important product attribute as they enable wireless data transmission, remote working, faster access to data, and in many cases, also result in increased efficiency and faster returns on investment. Increasingly, products related to wireless technology are appearing on the market, such as wireless tank gauging, data logger (integrated in a level measurement instrument) and related modules and PC software.
- The Netherlands has virtually no production of level indicators. However, the country is a medium-sized producer of instrument in the EU. It is seventh largest, behind

France and Denmark, but ahead of Spain and Sweden. Production in 2009 amounted to €319 million, after an annual growth of 5.9% between 2005 and 2009.

- Despite drops in imports in 2008 and 2009, imports grew by 2.6% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €8.0 million in 2010. Imports from DCs totalled €0.6 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 5.7 to 7.9%).
- Mexico was the leading DC supplier, accounting for 78% of all imports coming from DCs, followed by China (7.1%), South Africa (3.8%), Philippines (1.9%) and Tunisia (1.9%). Of the main DC suppliers, only Mexico experienced growth (+20% per year).
- The prices of imports (€50/kg) are higher than the average import price in the EU (€39/kg in 2010). The average price of imports from DCs (excl. China) was €43/kg in 2010 (€18.9/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the Netherlands or leading EU trade fairs in other EU countries (such as Achema in Frankfurt, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abcdirect.nl - business directory, search by product name.
- Dutch Association for the Water Treatment Industry - http://www.aquanederland.nl - click on 'leden'.
- Dutch Association of importers and manufacturers of industrial accessories - http://www.vifia.nl - click on 'ledenlijst' (member list).
- Dutch Oil & Gas Catalogue 2009 - http://www.iro-noc.nl - click on 'search a company'.
- Federation of the Technological Sectors - http://federatie.fhi.nl - click 'Leden' (members).
- Waterforum - http://www.waterforum.net - go to 'Marktwijzer' (market index) and search for 'Waterzuivering' (water treatment) or 'Riolering' (sewage).
- Aquatech - http://www.aquatechtrade.com/amsterdam - trade fair for the process, drinking and wastewater sectors. Every odd year (November) in Amsterdam.
- Het Instrument - http://www.hetinstrument.nl - biennial fair for process automation, even years (September), Amsterdam.
- Industry and Environment (Industrie & Milieu) - http://www.easyfairs.com - water, waste and energy trade fair, held annually in Rotterdam, May.
- Industrial Processing - http://www.industrialprocessing.nl - level indicators trade fair, held every even year (October) in Utrecht.
- PPT Food - http://www.easyfairs.com - food process equipment fair, annually (November), Zwolle.

Interesting players

Examples of interesting players are:

- Alaxa Products - http://www.alaxa.nl - distributor of instruments.
- DCM Emba - http://www.emba.nl - distributes instruments.
- Doedijns International - http://www.doedijns.nl - producer.
- Econosto - https://www.econosto.nl - large-sized international distributor of industrial products, including level measurement. The company belongs to the Eriks Group (the Netherlands).

- I&C Services - http://www.iandc.nl - distributor of tank level gauging and other instrumentation and control systems.
- IC Istec - http://www.istec.nl - distributor.
- Krohne - http://www.krohne.com - German producer of process measurement equipment, with a production facility in the Netherlands.
- Marktechnical - http://www.marktechnical.nl - distributes sensors and controls.
- Wika - http://www.wika.nl - distributor, subsidiary of Wika from Germany, producer of instruments.

The Netherlands hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Dutch Suppliers in the Oil and Gas Industry (IRO) - http://www.iro.nl.
- Dutch Association of Subcontracting Industries - http://www.nevat.nl.
- Dutch Oil and Gas Exploration and Production Association - http://www.nogepa.nl.
- Fluids Processing - http://www.fluidsprocessing.nl - bimonthly trade magazine.
- Holland Marine Equipment Association - http://www.hme.nl.
- Industrial Maintenance - http://www.industrialmaintenance-vakblad.nl - magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- PetroChem - http://www.petrochem.nl - monthly petrochemical magazine.

CBI
Ministry of Foreign Affairs of the Netherlands

Level indicators in Slovenia

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the level indicator market in Slovenia. Although Slovenia represents a small market for level indicators, ranking as the eighteenth largest in the EU, it is more receptive to new and less well-known brands of level indicators than most Western European markets. The best mode of market entry, however, is via subcontracting with domestic producers.

Market characteristics

- Slovenia is a small market for level indicators in the EU. It is the eighteenth largest, behind Hungary and Slovakia, but ahead of Greece and Bulgaria. Apparent demand in 2009 totalled €0.1 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -32%.
- As level indicators are crucial instruments relating to plant safety, buyers tend to look for a high level of accuracy and reliability, and mostly choose well-known quality brands from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands (although the Central and Eastern European market is more receptive to new brands than other European markets). A more advisable mode of market entry is via subcontracting to local manufacturers.
- Level indicators in the Central and Eastern European market are less advanced than those in the Western European market. Opportunities for DC exporters lie in the simple product segment, where affordable price is important and quality requirements are less high than in other segments. This includes, for example, tubular, magnetic or reflection level gauges, used in water treatment tanks.
- The Slovenian level indicator market has an immature character and mainly consists of a relatively large part of new installations, in particular, the food and water industry are still developing. In the water industry, for example, several investments are still expected in the water collection and distribution and sewer networks in order to comply with the EU Water Directives by 2015.
- Slovenia has virtually no production of level indicators.
- In the period 2006-2010 imports remained virtually stable although some fluctuations occurred from year to year. Imports amounted to €1.0 million in 2010. Imports from DCs totalled €0.02 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 2.3 to 3.0%).
- China accounted for 73% of all imports coming from DCs. China was followed by Croatia (23%), Serbia (3.4%), Mexico (0.5%) and Turkey (0.2%).
- The prices of imports (€60/kg) are relatively high compared to the average import price in the EU (€39/kg in 2010). The average price of imports from DCs (excl. China) was €56/kg in 2010 (€18.9/kg in the EU). Price remains very important in this country, as in other Central and Eastern European countries. Often, the first selection is often based on price.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Slovenia or leading EU trade fairs in other EU countries (such as Achema in Frankfurt, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Business Opportunities Exchange System - http://www.borza.org - choose English, click on 'search' and find potential business partners by sector.
- Chamber of Commerce and Industry of Slovenia - http://www.gzs.si/register_eng - provide business database for trading partner search.
- Sloexport - http://www.gzs.si/sloexport - business database of Slovenian exporters.
- Energetics - http://www.ce-sejem.si - trade fair for the energy sector, held every even year (May) in Celje.
- Megra - http://www.pomurski-sejem.si - construction and building materials fair, held annually (March) in Gornja Radgona.
- Plagkem - http://www.ce-sejem.si - level indicators fair, odd years (April) in Celje.

Interesting players

Examples of interesting players are:

- Elpro - http://www.elpro.si - producer of level indicators.
- Raci - http://www.raci.si - distributor.
- Sensor - http://www.sensor.si - distributor.
- Strix - http://www.strix.si - distributor of equipment.
- WIG - http://wig.si - distributor.

Slovenia hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Chamber of Commerce and Industry of Slovenia - http://www.sloveniapartner.com
- Slovenian Trade and Investment Promotion Office - http://www.investslovenia.org.
- Slovenian Press Agency - http://www.sta.si - business news.
- Slovenia Times - http://www.sloveniatimes.com - online business newspaper and monthly publication.

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Level indicators in the UK

This CBI fact sheet aims to introduce level indicator suppliers from developing countries (DCs) to the UK's market for level indicators. It is the tenth largest market in the EU. The market recorded an annual average growth of 11% between 2005 and 2009. The share of imports from DCs in the total level indicator imports is currently low, but experienced a positive growth during 2006-2010.

Market characteristics

- The UK is a large market for level indicators in the EU. It is the tenth largest, behind the Czech Republic and the Netherlands, but ahead of Finland and Denmark. Apparent demand in 2009 totalled €26 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 11%.
- The UK level indicator market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- Like elsewhere in the EU, the UK market relies heavily on well-known quality brands for level indicators for both new and replacement products. As level indicators are crucial instruments related to plant safety, buyers tend to look for a high level of accuracy and reliability, and mostly choose products from internationally renowned manufacturers. This makes it difficult for DC exporters to penetrate the market with own brands. It is advisable to enter the market via subcontracting to local manufacturers. In general, the UK instrumentation market is dominated by multinational producers.
- Level measurement products/solutions in the UK market are very diverse and are usually more technologically advanced than those in Central and Eastern Europe and DCs, especially in the petrochemical sector. Product trends are developing towards level indicators that can also measure other parameters, such as temperature, chemical substance, etc. In the case of highly technical level indicators UK buyers usually base their purchasing decision on the relation between the most economical and best technical solutions. When it comes to simple level indicators they base their decision mainly on costs.
- As level indicators from DCs are much less advanced than those in the Western European market, opportunities for DC exporters lie in the simpler product segment, where affordable price is important and quality requirements are not high. This includes, for example, tubular, magnetic or reflection level gauges, used in water treatment tanks.
- Wireless technologies continue to be a very important product attribute as they enable wireless data transmission, remote working, faster access to data, and in many cases, also result in increased efficiency and faster returns on investment. Increasingly, products related to wireless technology are appearing on the market, such as wireless tank gauging, data logger (integrated in a level measurement instrument) and related modules and PC software.

- The UK is a large producer of level indicators in the EU. It is the fourth largest, behind Czech Republic and Italy, but ahead of France and Belgium. Production in 2009 amounted to €30 million, after an annual growth of 13% between 2005 and 2009.
- As a result of a large drop in imports in 2008 (-32%), imports declined by 4.3% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €26 million in 2010. Imports from DCs totalled €1.1 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 2.3 to 4.3%).
- China accounted for 27% of all imports coming from DCs. China was followed by India (27%), Thailand (24%), Jordan (6.8%) and South Africa (3.6%). Of the main DC suppliers, only Thailand and India experienced growth (+291% and +218% per year respectively).
- The prices of imports (€58/kg) are relatively high compared to the average import price in the EU (€39/kg in 2010). There are no details on the average price of imports from DCs available.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of instruments), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the UK or leading EU trade fairs in other EU countries (such as Achema in Frankfurt, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Applegate directory - http://www.applegate.co.uk - search by 'Products & Services'.
- Hotfrog - http://www.hotfroguk.co.uk - company database.
- Pipeline Industries Guild - http://www.pipeguild.com - go to 'Membership' and 'Organisation member directory'.
- Process and Control today - http://www.pandct.com - search by 'Supplier', 'Product' or 'Product area'.
- Society of British Gas Industries - http://www.sbgi.org.uk - go to 'Membership' and select 'Member directory'.
- UK upstream and downstream of the oil and gas industry - https://www.og.decc.gov.uk - go to 'About us', then click on 'Oil and gas contacts'.
- IWEX-Water - http://www.sustainabilitylive.com - trade fair for the water and wastewater treatment sector, held biennially (uneven years in April or May) in Birmingham.
- Offshore Europe - http://www.offshore-europe.co.uk - oil and gas fair, biennially (odd years in September) in Aberdeen.
- PPMA Show - http://www.ppmashow.co.uk - process equipment fair, odd years (September/October) in Birmingham.
- Subcon - http://www.subconshow.co.uk - subcontracting manufacturing trade fair, held annually in Birmingham around May or June.
- Total Processing & Packaging - http://www.totalexhibition.com - process engineering equipment fair, triennially (May) in Birmingham. The next event will be held in 2013.

Interesting players

Examples of interesting players are:

- Bayham - http://www.tankgauges.co.uk - producer.
- Centre Tank Services - http://www.centretank.co.uk - distributes instrument.
- Delta Flowtech - http://www.deltaflowtech.com - distributes and exports ultrasonic level meter for open and closed tanks.

- Endress + Hauser - http://www.endress.com - Swiss producer of industrial measurement equipment, with a production facility in the UK.
- Eurogauge - http://www.eurogauge.co.uk - producer of tank level measurement; subsidiary of German Afriso-Euro-Index.
- Krohne - http://www.krohne.com - German producer of process measurement equipment, with a production facility in the UK.
- MGA Controls - http://www.mga-controls.co.uk - distributor of instruments.
- Powelectrics - http://www.powelectrics.co.uk - distributor.
- Sensors One - http://www.sensorsone.co.uk - distributes instruments.

The UK hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Steel Construction - http://www.steelconstruction.org.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Petroleum Industry Association - http://www.ukpia.com/home.aspx - news, industry issues and information on refineries.
- Process Engineering - http://www.centaur.co.uk - monthly engineering magazine.
- The Engineer - http://www.theengineer.co.uk - biweekly engineering magazine.
- UK offshore Operators Association - http://www.ukooa.co.uk - industry issues and events in the oil and gas industry.

CBI
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Submersible pumps in Belgium

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in Belgium. It is the sixteenth largest market in the EU. The best opportunities for DC exporters lie in the waste and waste water segments.

Market characteristics

- Belgium is a small market for submersible pumps in the EU. It is the sixteenth largest, behind Romania and Sweden, but ahead of Greece and Ireland. Apparent demand in 2009 totalled €11 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 6.9%.
- The year 2009 was a difficult year in terms of submersible pumps sales. Purchasing decisions were delayed, sometimes because international companies gave priority to investments in other countries.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 10-20% of all submersible pump sales and it also experienced good growth. For example, the pump market for waste water applications experienced an average growth of 10% per year in the period 2005-2010. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- The market segments oil, gas and industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing and several investments are still expected in the water collection and distribution and sewer networks.
- In the last decade, Belgian companies have turned to submersible pumps as a relatively cheap alternative to large vertical pumps. This is because submersible pumps are easy to install, easy to operate, and simple in construction. The benefits of submersible pumps are their relatively low weight which means they have lower foundation and lifting support installation needs than large vertical pumps. Besides, vertical pumps have more wear parts and usually need more labour intensive maintenance and repair operations compared to submersible pumps.
- Belgium is a small producer of submersible pumps in the EU. It is the nineteenth largest, behind Slovenia and Poland, but ahead of Latvia and Bulgaria. Production in

2009 amounted to €1.0 million, after an annual decline of 8.0% between 2005 and 2009.
- In the period 2006-2010, imports grew by 6.7%, which was a little bit higher than average development in the EU. Imports amounted to €23 million in 2010. Imports from DCs totalled €1.5 million in 2010. They grew slightly faster than total imports in the period under review, which led to an increase in their share (from 6.1 to 6.3%).
- China accounted for 96% of all imports coming from DCs. China was followed by India (2.8%), Colombia (0.4%), Vietnam (0.3%) and Indonesia (0.2%). Of the main DC suppliers, only China experienced growth (+9% per year).
- The prices of imports (€26/kg) are relatively high compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €5.4/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important with regard to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Belgium or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abc-d.be - Business-to-business directory.
- Aqua Belgica - http://www.aquabelgica.be - Belgian professional association in the water treatment industry. Click on 'ledenlijst' or 'liste des membres' (list of members).
- Aquarama - http://www.aquarama.be - annual trade fair and workshop on water technology, held yearly (November) in Nekkerhal Mechelen.
- Belgian Pump Association - http://www.pompenkring.be - professional association of machinery users. Registration is required for member search
- EasyFair Factory & Process Automation - http://www.easyfairs.com - in the "Volgende beurzen in" drop-down box, choose "België". The first fair was held in Brussels, October 2010.
- EasyFair Industrie & Milieu - http://www.easyfairs.com - environmental engineering trade fair, held annually (March) in Antwerp.
- Federation for the Technology Industry - http://www.agoria.be - Click on 'Find a company' and 'Advanced' to search Belgium-based companies by product names.
- Fluids Processing Benelux - http://www.fluidsprocessing.be - online trade magazine. Click 'Products', then 'Pumps' for a list of pump producers and distributors.
- Indumation - http://www.indumation.be - trade fair for factory, process and infrastructure automation, held every odd year (April or May) in Kortrij.
- Pumps & Valves - http:// www.easyfairs.com/pumps-nl_16132/ - biennially (uneven years in October) in Rotterdam, the Netherlands. In earlier years, this fair was held in nearby Antwerp, Belgium.
- Vlamish Network of Water Technology (TNAV) - http://www.tnav.be - cluster of Belgian technology providers in the area of (waste) water treatment. Click on 'Leden' for a list of members, including pump producers.

Interesting players

Examples of interesting players are:

- Auger - http://www.auger.be - pump distributor.
- Baleno Pumps - http://www.balenopumps.be - distributor.
- Bedu Pumps - http://www.bedu.be - distributors of pumps.

- Bosta - http://www.bosta.be - distributor (headquartered in the Netherlands).
- Eekels - http://www.eekels.be - distributor.
- Empo-Verder - http://www.empo-verder.be - distributes submersible pumps, among others.
- Maestro Pumps - http://www.maestro-pumps.be - distributes pumps.
- Marine Motors Pumps - http://www.marinemotors.be - distributor of pumps.
- Tumar - http://www.tumar.be - agent and distributor of pumps.
- Well Pumps - http://www.wellpumps.be - producer of submersible pumps.

Belgium hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Pumps Magazine - http://www.mainpress.com/english/magazines/pumps.htm - quarterly professional magazine for pumps, valves, and seals.
- Technique and Management - http://www.technique-et-management.be (French) or http://www.technisch-management.be (Dutch) - trade magazine for process equipment.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

Submersible pumps in Germany

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the German market for submersible pumps. Germany represents the EU's second largest market for submersible pumps. Imports from DCs account for an impressive 15% of the total import. The best opportunities for DC exporters lie in the waste and waste water segments.

Market characteristics

- Germany is a large market for submersible pumps in the EU. It is the second largest, behind Italy, but ahead of the UK and Spain. Apparent demand in 2009 totalled €121 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -5.4%.
- The German market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will be the continuously high investments in the gas pipeline and power generation network.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- In the last decade, German companies have turned to submersible pumps as a relatively cheap alternative to large vertical pumps. This is because submersible pumps are easy to install, easy to operate, and simple in construction. The benefits of submersible pumps are their relatively low weight which means they have lower foundation and lifting support installation needs than large vertical pumps. Besides, vertical pumps have more wear parts and usually need more labour intensive maintenance and repair operations compared to submersible pumps.
- Germany is the largest producer in the EU, ahead of Sweden and Italy. Production in 2009 amounted to €247 million, after an annual growth of 1.3% between 2005 and 2009.
- Despite a drop in imports in 2009 (-13%), imports grew by 3.6% in the period 2006-2010, which was a little bit lower than average development in the EU. Imports amounted to €159 million in 2010. Imports from DCs totalled €23 million in 2010.

They grew faster than total imports in the period under review, which led to an increase in their share (from 5.6 to 15%).

- China accounted for 99% of all imports coming from DCs. China was followed by India (0.5%) and Argentina (0.4%). Of the main DC suppliers, China experienced growth (+36% per year).
- The prices of imports (€10/kg) are relatively high compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €19/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Association of the German Petroleum Industry - http://www.mwv.de - news and statistics. Go to 'über uns' and click on 'Mitglieder' for a list of members.
- Database of the German Engineering Association - http://www.vdma-e-market.com/en/products-services/pumps/index.html
- Federal Association of the German Gas and Water Industry - http://www.bdew.de - click on 'BDEW', then 'Mitgliederübersicht' (members overview).
- German Water Partnership - http://www.germanwaterpartnership.de - go to 'About us' and click on 'Members'.
- Achema - http://www.achema.de - process industry fair, triennially (June) in Frankfurt. Next event in 2012. Exhibitor catalogue - http://woice-content2.dechema.de.
- Chemi.de - http://www.chemie.de - trade directory. Type product name in the search cell.
- Hannover Messe - http://www.hannovermesse.de - industrial automation fair, held annually (April) in Hannover.
- Wasser Berlin - http://www.wasser-berlin.com - water and gas fair, triennially (May).
- Wer liefert was? - http://www.wlw.de - German company database.
- Z - http://www.zuliefermesse.de - subcontracting trade fair, annually (March) in Leipzig.

Interesting players

Examples of interesting players are:

- Avag-Pumpen Import-Export - http://www.avag-pumpen.de.
- GWE - http://www.gwe-gruppe.de - producer of pumps.
- Heide-Pumpen - http://www.heide-pumpen.de - distributor of pumps.
- KSB - http://www.ksb.com - the EU's leading pump producer, headquartered in Germany.
- Lorentz - http://www.lorentz.de - producer of pumps.
- Mehner - http://www.mehner-gmbh.de - distributor.
- Sager + Mack - http://www.sager-mack.de - produces pumps.
- Tsurumi Pump - http://www.tsurumi-europe.com - producer of pumps.
- Verder - http://www.verder.de - international pump producer, headquartered in Germany.

Germany hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of German Engineers - http://www.vdi.de - provides engineering guidelines.
- Engineering & Technology - http://www.wiley-vch.de/publish/en/journals/alphabeticIndex/2044 - monthly magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Pumpe DE - http://www.pumpede.de - bimonthly pumps magazine.

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Submersible pumps in Italy

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the EU's largest market for submersible pumps: Italy. Imports of submersible pumps recorded a good growth of 6.4% during 2006-2010. Imports from DCs reached €2.5 million in 2010.

Market characteristics

- Italy is the largest market for submersible pumps in the EU, ahead of Germany and the UK. Apparent demand in 2009 totalled €126 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -6.6%.
- The market segments oil, gas and industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- In the last decade, Italian companies have turned to submersible pumps as a relatively cheap alternative to large vertical pumps. This is because submersible pumps are easy to install, easy to operate, and are simple in construction. The benefits of submersible pumps are their relatively low weight which means they have lower foundation and lifting support installation needs than large vertical pumps. Besides, vertical pumps have more wear parts and usually need more labour intensive maintenance and repair operations compared to submersible pumps.
- Italy is a large producer of submersible pumps in the EU. It is the third largest, behind Germany and Sweden, but ahead of Denmark and Hungary. Production in 2009 amounted to €196 million, after an annual decline of 4.0% between 2005 and 2009.
- In the period 2006-2010, imports grew by 6.4%, which was a little bit higher than average development in the EU. Imports amounted to €28 million in 2010. Imports from DCs totalled €2.5 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 5.5 to 9.0%).

- China accounted for 94% of all imports coming from DCs. China was followed by Turkey (3.1%), Iran (0.7%), Ukraine (0.5%) and Egypt (0.3%). Of the main DC suppliers, only China experienced growth (+21% per year).
- The prices of imports (€9.5/kg) are relatively high compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €3.2/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Italy or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Federation of the Italian Associations of Mechanical and Engineering Industries - http://www.anima-it.com - choose the English language and click on ‘members directory’.
- Italian Association for Food Producing, Processing and Preservation Manufacturers - http://www.assofoodtec.it - click on ‘associati e produzione’ and ‘Elenco Aziende’.
- Italian Association of Pump Manufacturers - http://www.assopompe.it - click on ‘Associati’ and on ‘Elenco associati’.
- Italian Federation of Agents - http://www.fnaarc.it - click on ‘agents search’.
- Water Gas - http://www.watergas.it - business portal for Italian gas and water companies. They also publish business directory books: ‘AquaAgenda’.
- Geofluid - http://www.geofluid.it - trade fair for technology and equipment for prospecting, extracting and conveying underground fluids, held every even year in Piacenza, October.
- H2O-Accadueo http://www.accadueo.com - trade fair for water distribution and treatment, held biennially (even years in May) in Ferrara.
- Subfornitura - http://www.senaf.it/fiera_eng.asp?fieraid=116 - subcontracting industrial processing fair, annually (March) in Parma.

Interesting players

Examples of interesting players are:

- Agieffe - http://www.agieffe.it - distributor.
- Calella - http://www.pompecalella.it - producer.
- Fail - http://www.fail.it - stock holding distributor.
- Fips - http://www.fips-pumps.it - producer.
- Matra - http://www.matra.it - producer and exporter.
- Orlando - http://www.orlando.it - distributor.
- Pentax Water Pumps - http://www.pentax-pumps.it - producer.
- Saer Elettropompe - http://www.saer.it - producer.
- Zenit - http://www.zenit.net - leading Italian producer of water technologies.

Italy hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Confederation of Italian industry - http://www.confindustria.it.
- Federation of the Energy and Water Industries - http://www.federutility.it.

- Italian Chamber of Commerce - http://www.unioncamere.it.
- Italian Petroleum Union/Unione Petrolifera - http://www.unionepetrolifera.it.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Reti Idriche & Gas - http://www.pubblindustria.info - bimonthly water and gas magazine.

Submersible pumps in Poland

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in Poland. It is the ninth largest market in the EU. The market was relatively stable during 2005-2009. The Polish import of submersible pumps reached €5.5 million in 2010 and the share of DC import in total imports reached 35%, which is relatively high.

Market characteristics

- Poland is a small market for submersible pumps in the EU. It is the ninth largest, behind Luxembourg and the Netherlands, but ahead of Hungary and the Czech Republic. Apparent demand in 2009 totalled €11 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 0.4%.
- The Polish market has an immature character and it consists of new installations to a large extent. In particular, the food and water industry are still developing. In the water industry, for example, several investments are still expected in the water collection and distribution and sewer networks in order to comply with the EU Water Directives by 2015. Furthermore, Poland has a relatively large gas market segment. This is because Poland is a large country and home to the sixth largest natural gas pipeline network in the EU.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- Poland is a small producer of submersible pumps in the EU. It is the eighteenth largest, behind Romania and Slovenia, but ahead of Belgium and Latvia. Production in 2009 amounted to €1.0 million, after an annual growth of 7.9% between 2005 and 2009.
- Despite some fluctuations in imports from year to year, in the period 2006-2010 imports remained virtually stable at €16 million. Imports from DCs totalled €5.5 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 13 to 35%).

- China accounted for 98% of all imports coming from DCs. China was followed by India (1.1%) and Belarus (0.4%). Of the main DC suppliers, only China experienced growth (+29% per year).
- The prices of imports (€5.6/kg) are higher than the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €4.0/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important when it comes to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Poland or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Association of Pump Manufacturers - http://www.polskiepompy.pl - comprises 45 member companies. Click on 'Producers of pumps' for a list of Polish pump producers.
- Polish LPG Association - http://www.pogp.pl - click on 'Firmy czlonkowskie'.
- Ekotech - http://www.ekotech.targikielce.pl - (waste)water fair, annually (March) in Kielce.
- Polagra Tech - http://www.polagra-tech.pl - food processing technology fair, annually (September) in Poznan.
- Targi Wod-Kan - http://www.igwp.org.pl - water sector fair, annually (May) in Bydgoszcz.
- Water and Sewage Industry TIWS - http://www.targikielce.pl - water sector fair, held every year (October) in Kielce.

Interesting players

Examples of interesting players are:

- Grupa Powen-Wafapomp - http://www.powen.pl - Poland's largest producer of pumps.
- Hydro Vacuum - http://www.hydro-vacuum.com.pl - producer.
- Hydroservice - http://www.hydroservice.pl - distributor.
- Ingersoll Rand - http://www.ingersollrand.pl - producer.
- Jung Pumpen - http://www.jung-pumpen.com - German producer of pumps, with a sales office in Poland.
- KFP Bialogon - http://www.kfp-bialogon.com.pl - producer.
- Saer Elettropompe - http://www.saerpompy.pl - water electric pump producer.
- Saga - http://www.saga.info.pl - distributor of pumps and valves.

Poland hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Polish Chamber of Commerce - http://www.chamberofcommerce.pl.
- Polish Chamber of the Exhibition Industry - http://www.polfair.pl - click on 'English' and on 'Exhibition Calender'.

- Polish Market - http://www.polishmarket.com.pl - monthly general industry magazine.
- Polish Steel Association - http://www.hiph.com.pl.
- Pompy Pompownie - http://pompy.pompownie.com - quarterly magazine for pumps and valves.

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Submersible pumps in Romania

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in Romania. It is the fourteenth largest market in the EU. The market recorded a good growth in imports from DCs, which reached €2.2 million in 2010 and accounted for as much as 22% in total imports.

Market characteristics

- Romania is a medium-sized market for submersible pumps in the EU. It is the fourteenth largest, behind Portugal and Austria, but ahead of Sweden and Belgium. Apparent demand in 2009 totalled €13 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 0.4%.
- The Romanian market has an immature character and it consists of new installations to a large extent. In particular, the food and water industry are still developing. In the water industry, for example, several investments are still expected in the water collection and distribution and sewer networks in order to comply with the EU Water Directives by 2015.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- Romania is a small producer of submersible pumps in the EU. It is the sixteenth largest, behind Austria and Czech Republic, but ahead of Slovenia and Poland. Production in 2009 amounted to €2.4 million, after an annual growth of 5.0% between 2005 and 2009.
- As a result of a drop in imports in 2009 and 2010, imports declined by 6.8% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €10 million in 2010. Imports from DCs totalled €2.2 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 8.0 to 22%).
- China accounted for 98% of all imports coming from DCs. China was followed by Croatia (0.5%), Ukraine (0.5%), Turkey (0.3%) and Moldova (0.2%). Of the main DC suppliers, only China experienced growth (+22% per year).

- The prices of imports (€5.1/kg) are higher than the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €8.7/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Romania or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Doing Business in Romania - http://mcir.doingbusiness.ro - browse companies by industry.
- InfoCompanies Romania - http://www.infocompanies.com - Romanian online directory; click on 'Industrial' or on 'Machinery'.
- Romanian Trade Promotion Centre - http://tpb.traderom.ro - click on 'Trade promotion center', 'Virtual exhibitions' and 'Companies'.
- Romanian Water Association (ARA) - http://www.ara.ro - click on 'Membri' (members).
- Bucharest International Technical Fair - http://www.tib.ro - held annually (October) in Bucharest.
- ExpoApa - http://www.araexpoapa.ro - exhibition for (waste)water treatment, held annually (June) in Bucharest.
- Renexpo - http://www.renexpo.ro - energy fair, held annually (November) in Bucharest.
- Romtherm - http://www.romtherm.ro - heating and cooling fair, annually (May) in Bucharest.

Interesting players

Examples of interesting players are:

- Amitech - http://www.amitech.ro - distributor of pumps and industrial equipment.
- Averasa - http://www.aversa.ro - producer.
- Calor - http://www.calorserv.ro -distributor of pumps and other products.
- Hidrotica - http://www.hidrotica.ro - distributor.
- Melinda Impex Instal - http://melindainstal.ro - distributor.
- Neptun - http://www.neptun-gears.ro - producer.
- RobsimComserv - http://www.robsiminstalatii.ro - distributor.
- Triago - http://www.triago.ro - producer.

Romania hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Romanian Chamber of Commerce and Industry - http://www.ccir.ro
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

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Submersible pumps in Spain

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in Spain. It is the fourth largest market in the EU. The best opportunities for DC exporters lie in the waste and waste water segments.

Market characteristics

- Spain is a large market for submersible pumps in the EU. It is the fourth largest, behind Germany and the UK, but ahead of France and Denmark. Apparent demand in 2009 totalled €49 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 0.9%.
- The market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by several investments in the gas pipeline and power generation network.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is high and increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- In the last decade, Spanish companies have turned to submersible pumps as a relatively cheap alternative to large vertical pumps. This is because submersible pumps are easy to install, easy to operate, and simple in construction. The benefits of submersible pumps are their relatively low weight and therefore they have lower foundation and lifting support installation needs than large vertical pumps. Besides, vertical pumps have more wear parts and usually need more labour intensive maintenance and repair operations compared to submersible pumps.
- Spain is a medium-sized producer of submersible pumps in the EU. It is the eleventh largest, behind Ireland and the UK, but ahead of Finland and Portugal. Production in 2009 amounted to €28 million, after an annual decline of 1.0% between 2005 and 2009.

- Despite a large drop in imports in 2009 (-21%), imports grew by 4.0% in the period 2006-2010, which was a little bit lower than average development in the EU. Imports amounted to €36 million in 2010. Imports from DCs totalled €2.4 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 6.3 to 6.8%).
- China accounted for 89% of all imports coming from DCs. China was followed by Turkey (7.7%), Colombia (2.4%), India (0.9%) and Mexico (0.1%). Of the main DC suppliers, only China experienced growth (+9% per year).
- The prices of imports (€0.4/kg) are relatively low compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €6.9/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Spain or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Barcelona Tecnologías de la Alimentación - http://www.bta-tecnoalimentaria.com - trade fair for the food industry, held every four years, the next fair will be held in May 2012.
- Smagua - http://www.smagua.com - water treatment fair, held biennially (even years in March) in Zaragoza.
- Spanish Association of Capital Goods Manufacturers - http://www.sercobe.es - find a list of associated firms by clicking on ‘members’.
- Spanish Association of Manufacturers of Pumps for Fluids - http://www.aefbombas.es - Click ‘Empresas Asociadas’ (Associated companies) for a list of members.
- Spanish Manufacturers Association of Construction and Mining Equipment - http://www.anmopyc.es - click on ‘Asociadoes’ to view members.
- Subcontratación - http://www.bilbaoexhibitioncentre.com - go to ‘Fairs’ and then select ‘Subcontratación’; annual subcontracting fair (September) in Bilbao.

Interesting players

Examples of interesting players are:

- Bombas Ideal - http://www.bombas-ideal.com - producer.
- Cramix - http://www.cramix.com - specialised pump distributor.
- Ebara - http://www.ebara.es - producer.
- Ejardin - http://www.ejardin.es - distributor.
- ESPA - www.espa.com - producer of centrifugal and submersible pumps.
- Pricast - http://www.pricast.es - distributor of pumps.
- Raimaber - http://www.raimaber.es - distributor for pumps.
- Talleres Patiño - http://www.tallerespatiño.es - distributor of pumps.

Spain hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Reveista de Metalurgia - http://www.cenim.csic.es - technical magazine.
- Tecnología del Agua - http://www.rbi.es/publicaciones - monthly water technology magazine.

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Submersible pumps in Sweden

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in Sweden. It is the fifteenth largest market in the EU. The best opportunities for DC exporters lie in the waste and waste water segments.

Market characteristics

- Sweden is a medium-sized market for submersible pumps in the EU. It is the fifteenth largest, behind Austria and Romania, but ahead of Belgium and Greece. Apparent demand in 2009 totalled €12 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -39%.
- The Swedish market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- The purchasing decision for a pump is increasingly being made in the light of lifecycle costs instead of initial expenses. This makes the concept 'design to costs' increasingly important for pump producers. Pump producers from DCs should therefore also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- In the last decade, Spanish companies have turned to submersible pumps as a relatively cheap alternative to large vertical pumps. This is because submersible pumps are easy to install, easy to operate, and simple in construction. The benefits of submersible pumps are their relatively low weight which means they have lower foundation and lifting support installation needs than large vertical pumps. Besides, vertical pumps have more wear parts and usually need more labour intensive maintenance and repair operations compared to submersible pumps.
- Sweden is a large producer of submersible pumps in the EU. It is the second largest, behind Germany, but ahead of Italy and Denmark. Production in 2009 amounted to €215 million, after an annual decline of 5.0% between 2005 and 2009.
- Despite some fluctuations in imports from year to year, imports remained virtually stable at €16 million in the period 2006-2010. Imports from DCs totalled €2.1 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 6.7 to 13%).
- China accounted for 97% of all imports coming from DCs. China was followed by Pakistan (1.4%), Argentina (0.9%), India (0.6%) and Turkey (0.1%). Of the main DC suppliers, only China experienced growth (+19% per year).

- The prices of imports (€11/kg) are relatively high compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €5.8/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Sweden or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Association of Swedish Engineering Industries - http://www.teknikforetagen.se/en/Membership/Sok-medlemmar and search with keyword.
- Swedish Pumps Suppliers' Association - http://www.swepump.org - click on 'Medlemmar' for member companies.
- Swedish Association of Suppliers of Water Treatment Equipment - http://www.varim.se. Click on 'Medlemmar' for a list of members.
- Swedish Agents Directory - http://www.agenturforetagen.se - database of Swedish agents. Click on 'Find company' and search by product name.
- Pump Portal - http://www.pumpportalen.se - directory for Swedish pump companies.
- Elmia Subcontractor - http://www.elmia.se/subcontractor - subcontracting fair, held annually (November) in Jönköping. Includes match-making event (http://www.b2fair.com).
- ProcessTeknik / Scanautomatic - http://www.scanautomatic.se - trade fair for the process industry. Next venue: October 2012 in Gothenburg.
- VA-mässan - http://www.vamassan.se - trade fair for water and wastewater technology, held annually (September) in Gothenburg.

Interesting players

Examples of interesting players are:

- ABS Group - http://www.absgroup.se - produces pumps and water treatment instruments.
- Axflow - http://www.axflow.com - international distributor (headquartered in Sweden).
- Borrcenter - http://www.borrcenter.se - distributor.
- Carl Stahl - http://www.carlstahl.se - producer.
- Grundfos - http://www.grundfos.se - producer.
- ITT Flygt - http://int.flygt.com - one of the world's largest producers, from Sweden.
- Pumpex - http://www.pumpex.se - producer.
- Torell pump - http://www.torellpump.se - pump distributor.

Sweden hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Energi och Miljö - http://www.energi-miljo.se - monthly energy/environment magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Ny Teknik - http://www.nyteknik.se - online technical magazine, weekly.

- Swedish Water & Wastewater Association - http://www.svensktvatten.se.
- Swedish Water Association - http://www.foreningenvatten.se.

Submersible pumps in the UK

This CBI fact sheet aims to introduce submersible pumps suppliers from developing countries (DCs) to the submersible pumps market in the UK. It is the third largest market in the EU. The best opportunities for DC exporters lie in the waste and waste water segments.

Market characteristics

- The UK is a large market for submersible pumps in the EU. It is the third largest, behind Italy and Germany, but ahead of Spain and France. Apparent demand in 2009 totalled €53 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -13%.
- The UK market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- DC exporters have the best opportunities in submersible pumps for water and waste water applications. This market segment represents 30-50% of all submersible pump sales. A main threat to this market is increasing pressure on funding by local governments. Reduced budgets for water and waste water treatment could lead to lower demand for submersible pumps in this segment.
- In terms of numbers sold, submersible pumps mainly for consumer use are sold the most. They are followed by sewage and fountain pumps for consumer and industrial use. In terms of value, the highest share is accounted for by well pumps and borehole pumps.
- Recently, lifecycle costs have increased in importance in the purchasing process for a submersible pump. In that respect, the UK market is running somewhat behind other EU markets. For pump producers from DCs this means that they should also focus on the development of pumps that have low lifecycle costs and easiness and low costs of maintenance.
- The UK is a medium-sized producer of submersible pumps in the EU. It is the tenth largest, behind Luxembourg and Ireland, but ahead of Spain and Finland. Production in 2009 amounted to €29 million, after an annual decline of 16% between 2005 and 2009.
- Despite a large drop in imports in 2009 (-17%), imports grew by 0.8% in the period 2006-2010, which was much lower than average development in the EU. Imports amounted to €58 million in 2010. Imports from DCs totalled €5.9 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 4.2 to 10%).
- Equatorial Guinea was the leading DC supplier, accounting for 36% of all imports coming from DCs, followed by China (33%), India (14%), Mexico (10%) and Malaysia (3.6%). Of the main DC suppliers, only China experienced growth (+23% per year).
- The prices of imports (€13/kg) are relatively high compared to the average import price in the EU (€4.2/kg in 2010). The average price of imports from DCs (excl. China) was €12/kg in 2010 (€10/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of submersible pumps), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the UK or leading EU trade fairs in other EU countries (such as Achema in Frankfurt in Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Applegate directory - http://www.applegate.co.uk - search by ‘Products & Services’.
- British Pump Manufacturers Association - http://www.bpma.org.uk - Click on ‘BPMA members’ for a list of British pump manufacturers.
- Hotfrog - http://www.hotfroguk.co.uk - company database.
- Pipeline Industries Guild - http://www.pipeguild.com - go to ‘membership’ and ‘organisation member directory’.
- Process and Control today - http://www.pandct.com - search by ‘supplier’, ‘product’ or ‘product area’.
- Water UK - http://www.water.org.uk - click on ‘Our members’ to view company members.
- IWEX-Water - http://www.sustainabilitylive.com - trade fair for the water and wastewater treatment sector, held biennially (uneven years in April or May) in Birmingham.
- Offshore Europe - http://www.offshore-europe.co.uk - oil and gas fair, biennially (odd years in September) in Aberdeen.
- PPMA Show - http://www.ppmashow.co.uk - process equipment fair, odd years (September/October) in Birmingham.
- Subcon - http://www.subconshow.co.uk - subcontracting manufacturing trade fair, held annually around May or June in Birmingham.
- Total Processing & Packaging - http://www.totalexhibition.com - process engineering equipment fair, triennially (May) in Birmingham. The next event will be held in 2013.

Interesting players

Examples of interesting players are:

- Amos - http://www.amospumps.com - distributor.
- Bestpump - http://www.bestpump.co.uk - pump distributor.
- Caprari - http://www.caprari.co.uk - producer.
- Hayward Tyler - http://www.haywardtyler.com - producer (also units in India and China).
- Hidrostal - http://www.hidrostal.co.uk - distributor.
- Kiwi Pumps - http://www.kiwipumps.com - producer and exporter.
- PD Pumps - http://www.pdpumpsltd.co.uk - distributor/agent.
- Prestige Pumps - http://www.prestigepumps.co.uk - pump distributor.
- TLC - http://www.tlc-direct.co.uk - distributor.

The UK hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Petroleum Industry Association - http://www.ukpia.com/home.aspx - news, industry issues and information on refineries.

- Process Engineering - http://www.centaur.co.uk - monthly engineering magazine.
- The Engineer - http://www.theengineer.co.uk - biweekly engineering magazine.
- What’s New in industry - http://www.wnii.co.uk - monthly industry magazine.

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Plastic pipes and fittings in Austria

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the plastic pipes and fittings market in Austria. It is the eleventh largest market in the EU. During 2005-2009, the market experienced a positive growth of 5.0%.

Market characteristics

- Austria is a medium-sized market for plastic pipes and fittings in the EU. It is the eleventh largest, behind Belgium and Finland, but ahead of Sweden and Greece. Apparent demand in 2009 totalled €295 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 5.0%. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in Austria.

Table 1 Austrian demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**242**	**327**	**295**	**5.0%**
flexible pipes, reinforced	49	68	56	3.2%
rigid PVC pipes	62	67	55	-3.0%
rigid PE pipes	17	52	27	12.7%
flexible pipes	25	47	47	17.4%
rigid PP pipes	28	41	44	11.6%
Fittings	36	36	40	2.6%
rigid pipes, other	25	17	26	0.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

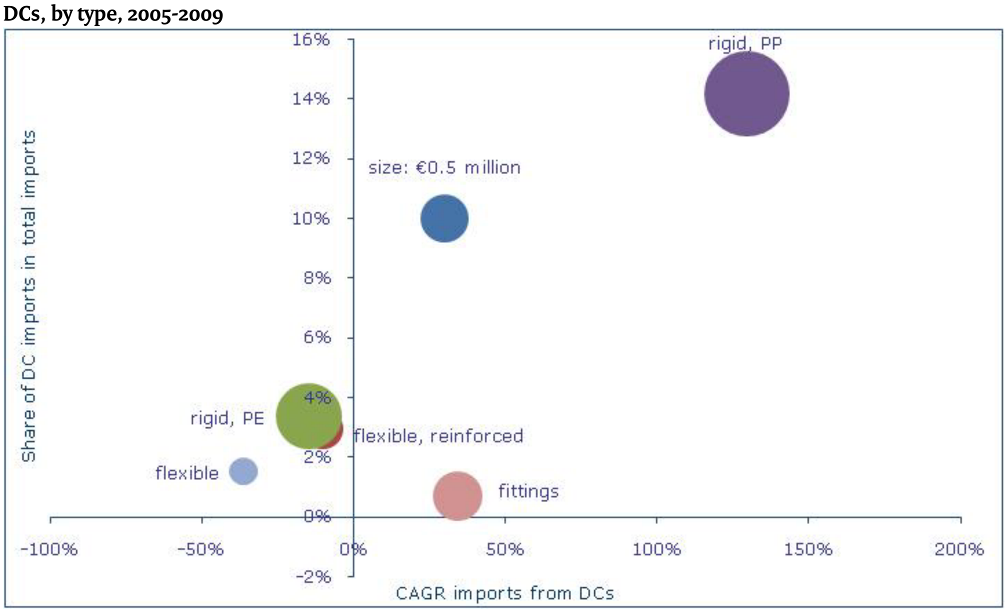
- The rising share of rigid PE pipes can be explained by the fact that they have several advantages over PVC pipes, mainly in their use in water and wastewater applications.
- Austria is a medium-sized producer of plastic pipes and fittings in the EU. It is the ninth largest, behind the Netherlands and Denmark, but ahead of Finland and Sweden. Production in 2009 amounted to €318 million, after an annual growth of 2.6% between 2005 and 2009.
- Major suppliers in Austria are Pipelife, Georg Fischer and Geberit.
- As a result of a large drop in imports in 2010 (-35%), imports declined by 9.2% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €149 million in 2010. Imports from DCs totalled €4.3 million in 2010. Contrary to total imports, the CAGR of DC imports was positive in the period under review, which led to an increase in their share (from 1.8 to 2.9%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- Croatia was the leading DC supplier, accounting for 60% of all imports coming from DCs, followed by India (16%), China (11%), Turkey (5.5%) and Serbia (4.3%). Of the

main DC suppliers, Croatia experienced the highest growth (+16% per year), followed by India (15%) and Turkey (5.0%).

- The prices of imports (€4.5/kg) are higher than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €2.1/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Austria's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in Austria. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Aqua-therm - http://www.aquatherm.at - trade fair for heating, air conditioning and plumbing, held every even year (January) in Vienna.
- Austria Strassen Dienst - http://www.astrad.org - trade fair for road construction and maintenance, held every odd year (April) in Wels.
- Austrian Association of the Chemical Industry - http://www.fcio.at - Click on 'Services', 'Products/Manufacturers', and 'By Product Category'. Choose 'Plastic Products' to view plastic pipes and fittings suppliers.
- Austrian commercial agents database - http://www.commercial-agent.at.
- Energy Fair - http://www.expo-energy.eu - trade fair for energy efficiency and renewable energy, held annually (February or March) in Wels.
- Firmen ABC - http://www.firmenabc.at - trade directory, search by product name.
- Wer liefert was? - http://www.wlw.at - trade directory, search by product name.

Interesting players

Examples of interesting players are:

- Agru - http://www.agru.at - producer, also internationally active with production in Germany and the USA.
- Bauernfeind - http://www.bauernfeind.co.at - producer of plastic pipes.
- Basic Elements - http://www.basic-elements.at - distributes plastic pipes and fittings for the Turkish company Firat.
- Egeplast - http://www.egeplast.at - manufacturer of plastic pipes.
- Hawle - http://www.hawle.at - producer of metal fittings and valves for plastic pipes.
- Internationally operating plastic pipes and/or fittings producers include: Pipelife (http://www.pipelife.com), Geberit (http://www.geberit.at), and Georg Fischer (http://www.georgfischer.at).
- Oswald Rohrsysteme - http://www.oswald-rohrsysteme.at - distributes plastic pipes.
- Poloplast - http://www.poloplast.at - manufactures plastic pipes.

Austria hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Austrian Association of Gas and Water (ÖVGW) - http://www.ovgw.at - represents the Austrian gas and water industries.
- Austria Chemistry Journal - http://www.chemie-zeitschrift.at - trade magazine for the chemical and food industries in Austria, published bi-monthly.
- Bau Zeitung - http://www.diebauzeitung.at - weekly construction trade journal.
- Gebäude Installation - http://www.gebaeudeinstallation.at - monthly trade magazine for the installation industry.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

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Plastic pipes and fittings in Bulgaria

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the plastic pipes and fittings market in Bulgaria. It is the twentieth largest market in the EU. Being a new EU member, the Bulgarian water sector will need to upgrade existing processes to comply with the EU's regulations and measures. The water sector is a promising market segment for plastic pipes and fittings.

Market characteristics

- Bulgaria is a small market for plastic pipes and fittings in the EU. It is the twentieth largest, behind Ireland and Slovakia, but ahead of Slovenia and Lithuania. Apparent demand in 2009 totalled €77 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 3.3%.
  Refer to Table 1 for more information on the several types of plastic pipes and fittings used in Bulgaria.

Table 1 Bulgarian demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**68**	**92**	**77**	**3.3%**
rigid PE pipes	15	25	19	6.2%
Fittings	15	18	13	-3.2%
flexible pipes	10	14	15	11.5%
rigid pipes, other	5	5	8	13.7%
rigid PVC pipes	11	12	8	-6.9%
flexible pipes, reinforced	7	11	8	2.7%
rigid PP pipes	5	6	5	2.4%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

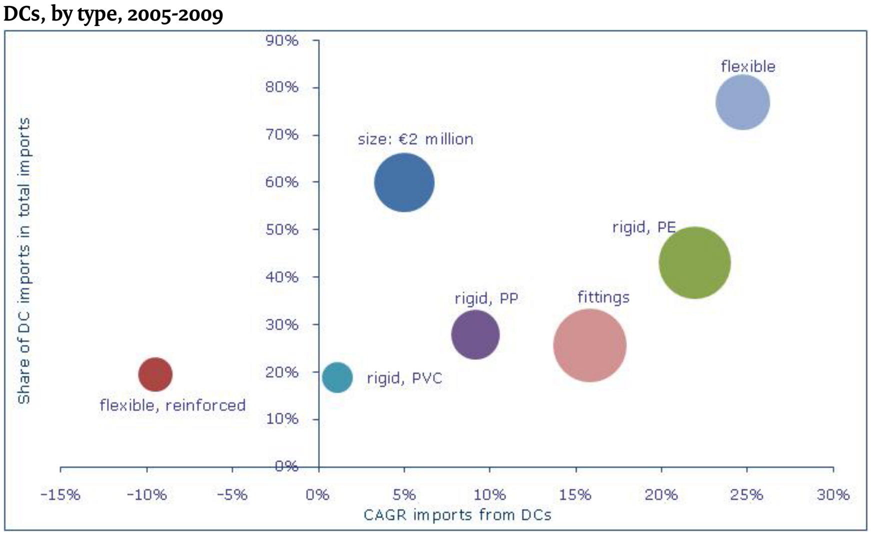
- The Bulgarian construction sector is at a critical stage and continued to contract in the first half of 2011, which has negatively impacted demand for plastic pipes and fittings. Due mostly to the suspension of real estate construction in 2009-2010, the sector declined by 25-30% annually, which is much higher than in most EU countries. The sector is expected to see a modest positive growth in 2011 and 2012, where movement will come from infrastructure construction such as planned railway infrastructure projects. In general, the uncertain economic environment and financial problems will continue to limit construction activities.
- Bulgaria's industrial sector has grown slowly, but steadily since the communist era in 2000. Many end-user industries of plastic pipes and process equipment in Bulgaria are still immature or developing, and a significant share of the plastic pipes and fittings market is expected to be attributed to new installations. Interesting market segments

are the drinking water, sewage, heating and plumbing and protective and conduit segments.

- As in many Central and Eastern European countries, installations and equipment have to be upgraded in order to meet European standards, not only in terms of competition, but also in terms of legislation. In the water industry, for example, investments are expected in water collection and distribution, sewer networks and waste water treament, so as to comply with the EU Water Directives by 2015.
- The rising share of rigid PE pipes can be explained by the fact that they have several advantages over PVC pipes, mainly in their use in water and wastewater applications. Demand for PE and PP pipes is expected to grow fast at the expense of PVC.
- Bulgaria is a small producer of plastic pipes and fittings in the EU. It is the twenty first largest, behind Slovakia and Slovenia, but ahead of Estonia and Luxembourg. Production in 2009 amounted to €27 million, after an annual decline of 3.0% between 2005 and 2009.
- As a result of a large drop in imports in 2009 (-29%) and 2010 (-42%), imports declined by 11% in the period 2006-2010, which was a slightly lower decline than average development in the EU. Imports amounted to €32 million in 2010. Imports from DCs totalled €10 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 19 to 32%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- Turkey was the leading DC supplier, accounting for 40% of all imports coming from DCs, followed by Macedonia (40%), Serbia (11%), China (5.1%), Croatia (3.5%). Of the main DC suppliers, Macedonia experienced the highest growth (+51% per year), followed by Croatia (19%) and Serbia (4.0%).
- The prices of imports (€3.0/kg) are lower than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €1.9/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices; please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Bulgaria's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in Bulgaria.
Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- BG Catalog - http://www.bgcatalog.com - business portal, search with product name.
- Bulgaria online - http://www.online.bg - Bulgarian portal with a lot of useful business links.
- Bulgarian chamber of commerce and industry - http://www.bcci.bg/services/directory.htm - trade directory. Log in as a guest and search for companies.
- Bulgarian Industrial Capital Association - http://www.bica-bg.org - comprises more than 40,000 enterprises in all industrial sectors in Bulgaria. Click on 'Members' and register.
- Business - http://www.business.bg - online industry directory. Search by product name.
- Catalog - http://catalog.bg - Bulgarian online trade directory.
- Need.bg - http://www.need.bg - search by keyword, such as 'pipes'.
- Aquatech - http://www.fair.bg - annual water management fair in Plovdiv in September.
- International Technical Fair - http://www.fair.bg - even years (September) in Plovdiv.
- Stroytech - http://www.fair.bg - exhibition for building materials, equipment and technology, held annually (September) in Plovdiv.
- The Agriculture and Everything for it - http://www.dobrich-fair.com - trade fair for food processing equipment, held annually in Dobrich in August or September.

Interesting players

Examples of interesting players are:

- Abvent - http://www.abvent.bg - imports and distributes plastic pipes and fittings.
- Bigro - http://www.bigro.net - importer and distributor of plastic pipes and fittings.
- Deca Trade - http://www.decatrade.bg - importer and distributor of plastic fittings.
- Flash Co. - http://www.flashco.bg - produces plastic pipes and fittings.
- Internationally operating plastic pipes and/or fittings producers include: Pipelife (http://www.pipelife.com) and Wavin (http://bg.wavin.com).
- Pipe Industrial Bulgaria - http://www.pi-bg.com - manufacturer of plastic pipes.
- Plastec - http://www.plastec-bg.com - manufacturer of plastic pipes.

Bulgaria hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Bulgarian Industrial Association - http://www.bia-bg.com - Bulgarian industry information.
- Engineering review magazine - http://www.engineering-review.bg/engineeringeng.aspx - engineering magazine with nine issues per year.
- Journal of Materials Science and Technology - http://jmst.ims.bas.bg - four times a year.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Novinite - http://www.novinite.com - online Bulgarian economic and business news.
- TD Installations - http://www.tech-dom.com - magazine for building installations and equipment, published nine times per year.

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Plastic pipes and fittings in Czech Republic

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the plastic pipes and fittings market in the Czech Republic. It is the fourteenth largest market in the EU. The Czech market for plastic pipes and fittings recorded an impressive annual average growth in apparent demand of around 13% during 2005-2009.

Market characteristics

- The Czech Republic is a medium-sized market for plastic pipes and fittings in the EU. It is the fourteenth largest, behind Sweden and Greece, but ahead of Portugal and Hungary. Apparent demand in 2009 totalled €254 million. Compound annual average growth (CAGR) in the period under review. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in the Czech Republic.

Table 1 Czech demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**157**	**268**	**254**	**12.7%**
Fittings	22	55	95	43.8%
flexible pipes	41	33	32	-6.0%
flexible pipes, reinforced	34	49	32	-1.5%
rigid PP pipes	12	65	27	21.4%
rigid PE pipes	21	27	19	-2.8%
rigid pipes, other	13	21	36	28.9%
rigid PVC pipes	14	17	14	-0.6%

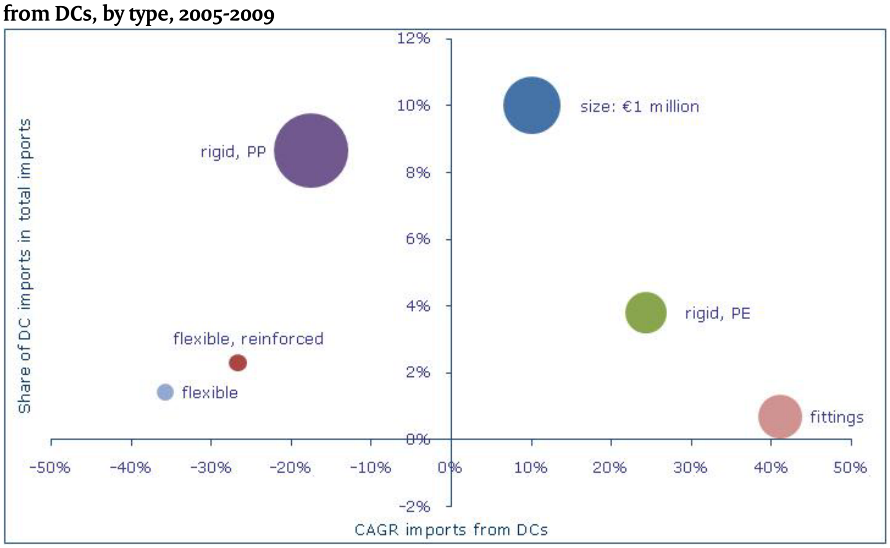
Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- End customer industries that make the most use of plastic pipes and fittings in the Czech market are drinking water, sewage, heating and protective and conduit.
- The Czech Republic is a medium-sized producer of plastic pipes and fittings in the EU. It is the thirteenth largest, behind Sweden and Belgium, but ahead of Portugal and Greece. Production in 2009 amounted to €226 million, after an annual growth of 18% between 2005 and 2009.
- Major suppliers in the Czech Republic include Pipelife, Wavin, KWH and Dyka/Tessenderlo. The relatively high growth of PP pipes can be attributed to the presence of Pipelife in the Czech Republic. Pipelife produces the Magna range of PP pipes in the country, and it appears that they realised good sales results in the period under review. The company has also acquired Instaplast, which is a local producer of premium hot and cold plastic pipe systems, and also serves other Central and Eastern European markets, such as Slovakia, Slovenia and Bulgaria.

- As a result of a large drop in imports in 2009 (-23%) and 2010 (-32%), imports declined by 10% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €146 million in 2010. Imports from DCs totalled €3.0 million in 2010. They dropped faster than total imports in the period under review, which led to a decline in their share (from 2.3 to 2.1%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- Serbia was the leading DC supplier, accounting for 70% of all imports coming from DCs, followed by Turkey (16%), China (7.2%), Thailand (4.8%) and Croatia (1.5%). Of the main DC suppliers, Serbia experienced very high growth (more than 300% per year), followed by Thailand (28%).
- The prices of imports (€4.7/kg) are higher than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €4.6/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Czech Republic's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in the Czech Republic.
Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- European Databank - http://www.edb.cz - Czech company databank.
- Firmy - http://www.firmy.cz - online business directory. Search by product name.
- Wer liefert was? - http://www.wlw.cz - online trade directory. Search by product name.
- Aqua Set - http://www.aquaset.cz - trade fair with a focus on water treatment, held annually (February) in Prague.
- Envibrno & Vodovody-Kanalizace - http://www.bvv.cz/envibrno-gb - trade fair for water and wastewater treatment, held annually (May) in Brno.
- MSV - http://www.bvv.cz/msv-gb - process engineering fair, annually (September), Brno.
- Trade Fairs Brno - http://www.bvv.cz - find an overview of all trade fairs in Brno.

Interesting players

Examples of interesting players are:

- Aqua Direct - http://www.aquadirect.cz - distributor of plastic pipes and fittings.
- Aqua Plastik - http://www.aquaplastik.cz - distributor of plastic pipeline systems.
- Internationally operating plastic pipes and/or fittings producers include: Pipelife (http://www.pipelife.com), Wavin (http://www.ekoplastik.cz), Dyka/Tessenderlo (http://www.dyka.com) and KWH (http://www.fintherm.cz).
- PCV Alfa - http://www.pcvalfa.cz - distributor of plastic pipes.
- Plum - http://www.plumy.cz - distributor of plastic pipes and piping systems.
- TIÚ-Plast - http://www.tiu.cz - distributor of plastic pipes.

The Czech Republic hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Czech Business Weekly - http://www.cbw.cz - weekly general business magazine.
- Czech Gas Union - http://www.cpu.cz - gas association.
- Czech Plastic Pipes Association - http://www.adpp.cz.
- Czech Statistical Office - http://www.czso.cz - facts and figures on the Czech industry.
- Gas - http://www.cgoa.cz/en/gas-magazine/on-gas.ep - monthly gas magazine.
- Konstrukce - http://www.konstrukce.cz - bimonthly engineering magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

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Plastic pipes and fittings in France

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the plastic pipes and fittings market in France. It is the fifth largest market in the EU. The increasing cost of metals in recent years has strengthened demand for plastic pipes and fittings in France.

Market characteristics

- France is a large market for plastic pipes and fittings in the EU. It is the fifth largest, behind the UK and Spain, but ahead of Poland and the Netherlands. Apparent demand in 2009 totalled €971 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 0.4%. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in France.

Table 1 French demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**954**	**1,130**	**971**	**0.4%**
rigid PVC pipes	348	382	343	-0.4%
flexible pipes, reinforced	195	242	171	-3.2%
rigid PE pipes	169	187	184	2.2%
Fittings	79	165	120	11.1%
flexible pipes	121	143	133	2.2%
rigid pipes, other	33	0	12	-21.8%
rigid PP pipes	9	10	8	-2.3%

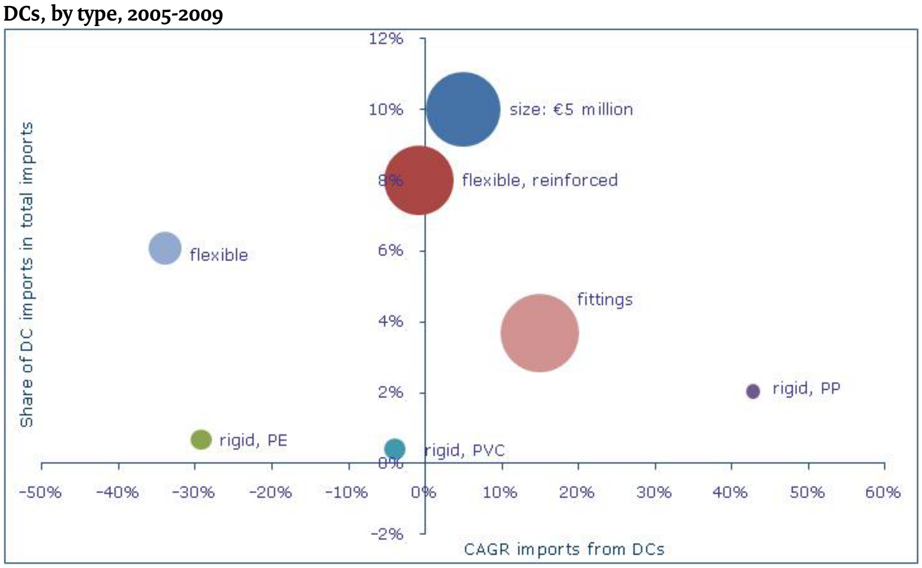
Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The French economy contracted in 2009, but went on to show a slight improvement in 2010. After a significant decline in the level of construction activities in 2010, the level further dropped by 4.2% in 2010. Whereas the new construction segment fell by 6.7%, the renovation segment fell by 1.3%. Major French distributors of construction products as well as DIY chains experienced a decline in sales. The construction sector is expected to show a positive, but modest growth in 2011 and beyond, especially in the infrastructure sector.
- The market segments gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks.
- The recent sharp rise in the cost of metals (especially steel, brass and copper) has increased the competitiveness of plastic pipes given the attractivemess of their pricing. In addition, plastic pipes and fittings also have superior resistance to corrosion, pressure and temperature.

- The rising share of rigid PE pipes can be explained by the fact that they have several advantages over PVC pipes, mainly in their use in water and wastewater applications.
- France is a medium-sized producer of plastic pipes and fittings in the EU. It is the fifth largest, behind the UK and Spain, but ahead of Poland and the Netherlands. Production in 2009 amounted to €728 million, after an annual decline of 1.0% between 2005 and 2009.
- A large share of the French plastic pipe and fitting market is comprised of the market leaders, namely Aliaxis, Pipelife, Wavin (particularly strong in civil and infrastructure applications) and Alphacan; all of which are well-known in the EU, if not globally. In April 2011, Pipelife announced its plan of acquiring Alphacan's pipe business in France, which will then make it the biggest player in the French plastic pipe market. Two Spanish players, namely Urulita and Masa (part of Aliaxis) are strongly represented in the South of France.
- As a result of a large drop in imports in 2009 (-12%) and 2010 (-30%), imports declined by 9.8% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €391 million in 2010. Imports from DCs totalled €12 million in 2010. They dropped more slowly than total imports in the period under review, which led to a growth in their share (from 2.8 to 3.0%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- China accounted for 46% of all imports coming from DCs. China was followed by Tunisia (22%), Turkey (8.7%), Thailand (8.4%) and India (7.1%). Of the main DC suppliers, only India experienced growth (+4.0% per year).
- The prices of imports (€2.9/kg) are lower than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €3.9/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 France's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in France.
Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abc-d.fr - type a keyword and search for companies.
- French association of plastic pipes and hoses producers - http://www.str-pvc.org - members make up 80% of the French PVC pipes and fittings market. Click on 'Adhérents' for a list of members.
- French gas association - http://www.afgaz.fr/uk/index.php - click on 'AFG', 'Presentation' and then on 'Members'.
- Provrac - http://www.provrac.com - online directory of French providers of equipment. Click on 'Pneumatic conveying', then 'pipes' for an overview of pipe suppliers.
- Industrie Paris - http://www.industrie-expo.com - industrial design and production fair, annually (March), even years in Paris, odd years in Lyon.
- Midest - http://www.midest.com - annual industrial subcontracting fair (November), Paris.
- Pollutec - http://www.pollutec.com - environmental technology, held annually in Lyon (even year) and Paris (odd year), November.

Interesting players

Examples of interesting players are:

- Acome - http://www.acome.fr/fr/Batiment2 - producer of under-floor heating systems.
- Audebert - http://www.audebertcaoutchouc.com - producer.
- BSS Group - http://www.bssgroup.com - British owned distributor.
- Cedeo - http://www.cedeo.fr - distributor.
- Formatub - http://www.formatub.fr - distributor.
- Frans Bonhomme - http://www.fransbonhomme.fr - distributor.
- Girpi - http://www.girpi.com - producer of plastic pipe systems and fittings.
- Internationally operating plastic pipes and/or fittings producers include: Aliaxis (http://www.aliaxis.com), headquartered in France, also owns Glynwed from the UK), Pipelife (http://www.pipelife.com), Polypipe (http://www.janoplast.fr), Wavin (http://fr.wavin.com), Alphacan (http://www.arkema.com/sites) and Urulita - (http://www.adequa-tuberias.com).
- Nicoll - http://www.nicoll.fr - producer.
- PUM Plastiques - http://www.pumplastiques.com - distributor.

France hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Assembly of French Chambers of Commerce and Industry - http://www.acfci.cci.fr.
- Hydroplus - http://www.hydroplus.info - water and wastewater magazine, 8 issues a year.
- Industrie et Technologies - http://www.industrie-technologies.com - online industry magazine, also offers a monthly printed version.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- L'Usine Nouvelle - http://www.usinenouvelle.com - weekly industrial magazine.
- Magazine Liquides - http://www.somia-editions.com/liquides - bimonthly liquids processing magazine.
- Matériaux et Techniques - http://www.mattech-journal.org - bimonthly technical magazine.

CBI
Ministry of Foreign Affairs of the Netherlands

Plastic pipes and fittings in Italy

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the Italian plastic pipes and fittings market. It represents the EU's second largest market and experienced an annual average growth of 3.1% during 2005-2009.

Market characteristics

- Italy is a large market for plastic pipes and fittings in the EU. It is the second largest, behind Germany, but ahead of the UK and Spain. Apparent demand in 2009 totalled €1.6 billion. Compound annual average growth (CAGR) in the period under review (2005-2009) was 3.1%. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in Italy.

Table 1 Italian demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**1,385**	**1,606**	**1,568**	**3.1%**
rigid PVC pipes	356	347	381	1.7%
flexible pipes	309	468	370	4.6%
Fittings	164	241	281	14.4%
rigid PE pipes	307	314	203	-9.8%
rigid pipes, other	95	127	208	21.6%
flexible pipes, reinforced	94	50	96	0.6%
rigid PP pipes	60	57	28	-17.2%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

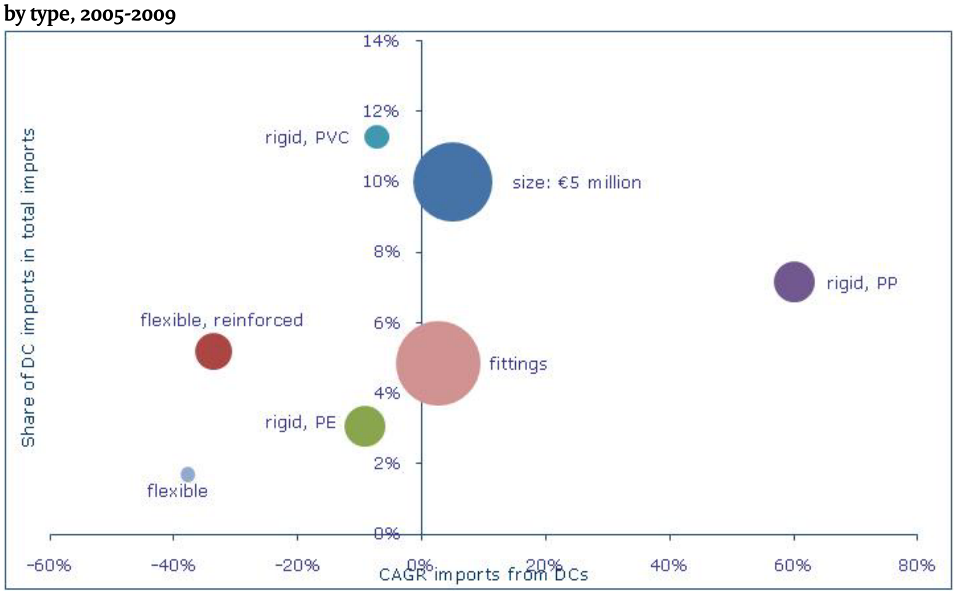
- The market for plastic pipes and fittings in Italy has decreased considerably in 2010 due to overall economic downturn and limited construction activities. The crisis of the Italian construction industry (the new housing segment, in particular, has dropped sharply) is expected to continue throughout 2011. Therefore, the low level of demand for plastic pipes and fittings in Italy is likely to continue.
- The market segments gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks.
- In contrast to most other EU countries, PE pipes have not experienced high growth in the period under review. This is mainly caused by the market domination and strong marketing efforts of Alphacan, which is specialised in the production of PVC products.
- Italy is a large producer of plastic pipes and fittings in the EU. It is the second largest, behind Germany, but ahead of the UK and Spain. Production in 2009 amounted to €2.0 billion, after an annual growth of 4.1% between 2005 and 2009.
- Major suppliers are local companies such as Deriplast and Lareter, while the large EU companies Alphacan and Wavin (particularly strong in building and installation

applications) also have production facilities and a strong position on the Italian market.

- As a result of a large drop in imports in 2009 (-19%) and 2010 (-30%), imports declined by 12% in the period 2006-2010, which was a slightly higher decline than average development in the EU. Imports amounted to €217 million in 2010. Imports from DCs totalled €10 million in 2010 which showed slightly more of a drop than total imports in the period under review, but the share remained at 4.7%. Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- China accounted for 42% of all imports coming from DCs. China was followed by Tunisia (26%), Turkey (14%), Brazil (3.9%) and Serbia (3.8%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€5.4/kg) are higher than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €3.6/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Italy's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in Italy.
Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Italian Association of Valve and Fitting Manufacturers - http://www.associazioneavr.it - click on 'associati' (member) and on 'elenco associati' (member list).
- Direct Industry - http://www.directindustry.it - company database.
- Accadueo - http://www.accadueo.com - (waste)water treatment technology and distribution trade fair, held annually in Ferrara every even year (May).

- EIMA International - http://www.eima.it - agricultural machinery exhibition, held in Bologna every even year (November).
- Geofluid - http://www.geofluid.it - trade fair for technology and equipment for prospecting, extracting and conveying underground fluids, held in Piacenza every even year.
- Sub-fornitura - http://www.senaf.it/fiera_eng.asp?fieraid=116 - subcontracting industrial processing trade fair, held annually in Parma, March.

Interesting players

Examples of interesting players are:

- Aquatechnik - http://www.aquatechnik.it - producer of plastic pipes.
- Bucchi - http://www.bucchi.it - producer of plastic fittings.
- Deriplast - http://www.deriplast.net - producer of PE pipes.
- Errecinque - http://www.errecinque.com - producer of plastic and rubber pipes/hoses.
- Fasano - http://www.raccordifasano.com - produces plastic fittings.
- FIP - http://www.fipnet.it/EN - producer of plastic fittings and valves.
- Internationally operating plastic pipes and/or fittings producers include: Wavin (http://it.wavin.com) and Alphacan (http://www.alphacan.it).
- Lareter - http://www.lareter.it - producer.
- Polypipe - http://www.polypipeitalia.com - producer of plastic fittings.
- RDZ - http://www.rdz.it - leading supplier of under-floor heating systems.
- Steeltrade - http://www.steeltrade.it - distributor of HDPE pipes and fittings.

Italy hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Acqua & Aria - http://www.bema.it/acquaearia - monthly environmental technology magazine.
- Confederation of Italian industry - http://www.confindustria.it - represents more than 140,000 Italian manufacturing and services companies and associations.
- Italian association of plastic and rubber manufacturers - http://www.federazionegommaplastica.it.
- Italian Federation Of Agents And Commercial Representatives - http://www.fnaarc.it.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- L'Ambiente - http://www.ranierieditore.it/ambiente.htm - bimonthly environmental technology magazine.
- Reti Idriche & Gas - http://www.pubblindustria.info - bimonthly water and gas magazine.

CBI
Ministry of Foreign Affairs of the Netherlands

Plastic pipes and fittings in Portugal

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the plastic pipes and fittings market in Portugal. It is the fifteenth largest market in the EU. Despite the small market size, imports of plastic pipes and fittings from DCs recorded a positive growth during 2006-2010.

Market characteristics

- Portugal is a small market for plastic pipes and fittings in the EU. It is the fifteenth largest, behind Greece and Czech Republic, but ahead of Hungary and Romania. Apparent demand in 2009 totalled €166 million. Compound annual average growth (CAGR) in the period under review (2005-2009) reached -8.1%. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in Portugal.

Table 1 Portuguese demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**233**	**199**	**166**	**-8.1%**
rigid PVC pipes	74	61	52	-8.4%
rigid PE pipes	54	49	33	-11.2%
Fittings	44	43	38	-3.4%
flexible pipes	29	21	12	-19.5%
rigid PP pipes	21	20	14	-9.0%
rigid pipes, other	1	3	9	66.0%
flexible pipes, reinforced	10	2	7	-9.4%

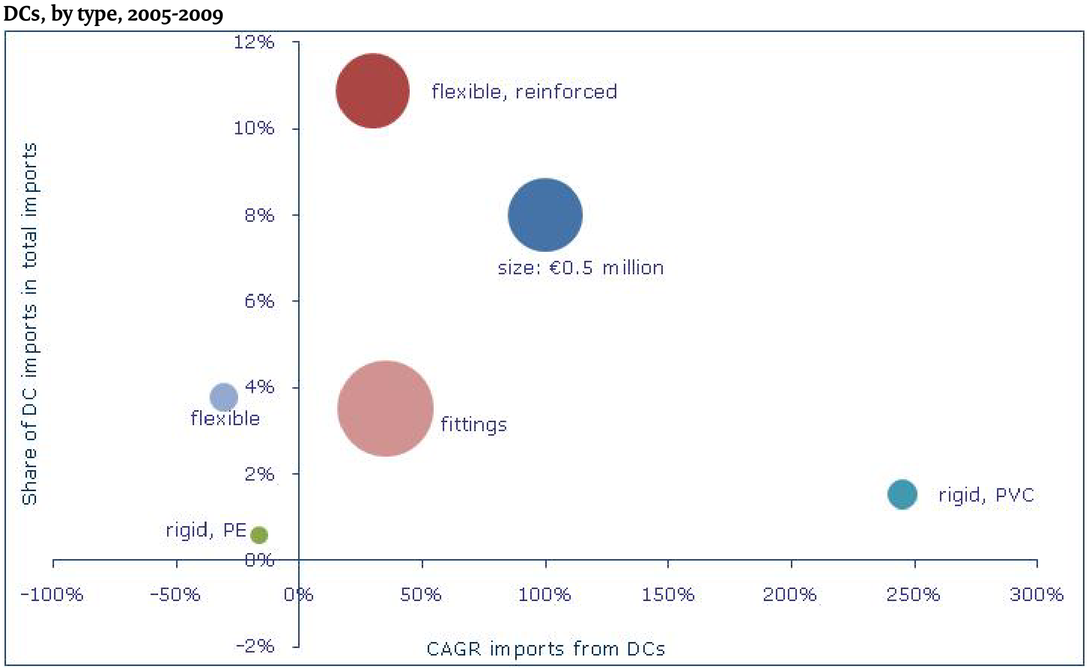
Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The rising share of other rigid pipes can be explained by the fact that they have several advantages over PVC pipes, mainly in their use in water and wastewater applications.
- Portugal is a small producer of plastic pipes and fittings in the EU. It is the fourteenth largest, behind Belgium and the Czech Republic, but ahead of Greece and Romania. Production in 2009 amounted to €180 million, after an annual decline of 5.0% between 2005 and 2009.
- Major suppliers are Urulita, the few Portuguese producers (Fersil, Heliroma, Novinco) and KWH and Wavin. Most PP pipes in Portugal are made by Fersil.
- As a result of a large drop in imports in 2009 (-10%) and 2010 (-41%), imports declined by 9.2% in the period 2006-2010, which was a lower decline than average development in the EU. Imports amounted to €43 million in 2010. Imports from DCs totalled €1.7 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 1.3 to 3.9%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.

- Turkey was the leading DC supplier, accounting for 38% of all imports coming from DCs, followed by China (28%), India (22%), Lebanon (9.1%), Morocco (2.1%). Of the main DC suppliers, India experienced the highest growth (+102% per year), followed by Turkey (36%) and China (12%).
- The prices of imports (€4.9/kg) are higher than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €3.8/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Portugal's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in Portugal. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- Agro Portal - http://www.agroportal.pt - trade directory for the agro-industrial sector, search with 'tubos'.
- Directório IOL - http://www.directorio.iol.pt - trade directory, search by product name.
- Hotfrog - http://www.hotfrog.pt - trade directory, search by product name.
- NGET Portugal - http://www.nget.pt - trade directory, search by product name.
- Construnor Expo - http://www.peb.pt/evento.php?id=100 - exhibition for the construction industry, held every even year (September) in Braga.
- EMAF Expo - http://www.emaf.exponor.pt - exhibition for the industrial machinery, tools and accessories sectors, held annually (November) in Porto. The fair includes Interindústria which is a trade fair for industrial products and services.

- Piscina Expo - http://www.salaopiscinas.com/index.php?idioma=en - exhibition for swimming pools and aquatics, held annually (October) in Santarem.

Interesting players

Examples of interesting players are:

- ADJ - http://www.ajd.pt - distributor.
- Eurotubo - http://www.eurotubo.pt - distributor.
- Fersil - http://www.fersil.pt - producer of plastic pipes and fittings.
- Heliflex - http://www.heliflex.pt - producer of flexible pipes.
- Heliroma Plásticos - http://www.heliroma.com.pt - producer of plastic pipes and fittings.
- Hidrenki - http://www.hidrenki.pt - distributor.
- Internationally operating plastic pipes and/or fittings producers include: KWH (http://www.kwhpipe.com), Wavin (http://pt.wavin.com), and Adequa-Urulita - (http://www.adequa-tuberias.com).
- Momel - http://www.momel.pt - distributor.
- Novinco - http://www.novinco.pt - producer of plastic pipes.

Portugal hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Portuguese Association of the Plastics Industry - http://www.teppfaportugal.com.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

CBI
Ministry of Foreign Affairs of the Netherlands

Plastic pipes and fittings in Spain

This CBI fact sheet aims to introduce plastic pipes and fittings suppliers from developing countries (DCs) to the Spanish plastic pipes and fittings market. Spain is the fourth largest market in the EU. The Spanish water industry is still developing and represents an interesting market segment for plastic pipes and fittings.

Market characteristics

- Spain is a large market for plastic pipes and fittings in the EU. It is the fourth largest, behind Italy and the UK, but ahead of France and Poland. Apparent demand in 2009 totalled €1.0 billion. Compound annual average growth (CAGR) in the period under review (2005-2009) was -7.1%. Refer to Table 1 for more information on the several types of plastic pipes and fittings used in Spain.

Table 1 Spanish demand for plastic pipes and fittings, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**1,389**	**1,807**	**1,035**	**-7.1%**
rigid PE pipes	388	559	286	-7.4%
rigid PVC pipes	383	419	279	-7.6%
Fittings	201	311	163	-5.1%
rigid pipes, other	111	169	109	-0.5%
flexible pipes	137	165	95	-8.7%
rigid PP pipes	61	90	59	-1.0%
flexible pipes, reinforced	108	93	46	-19.4%

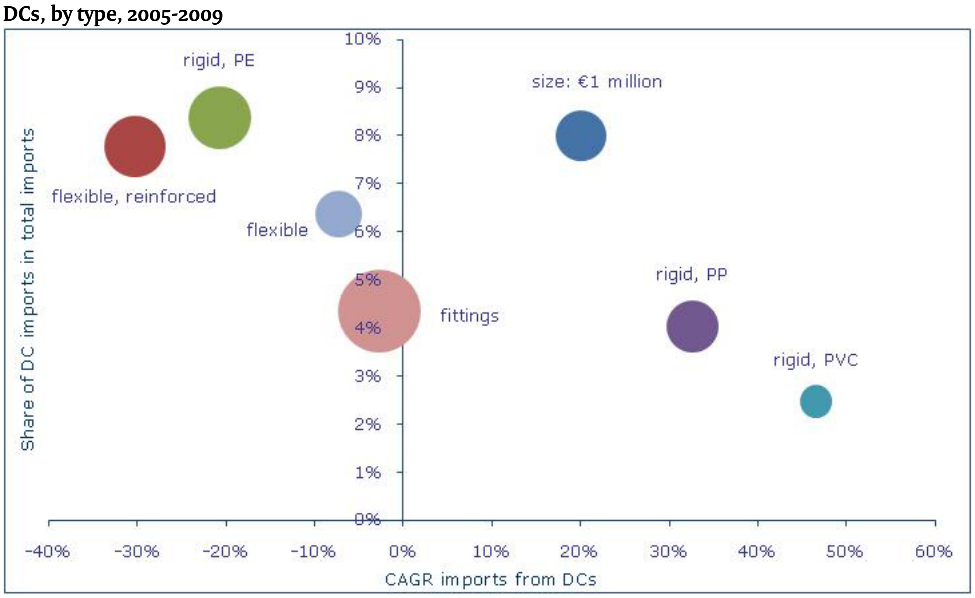
Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Spanish economy continued to suffer in 2010 with a GDP decline of 0.4%, after a decline of 3.7% in 2009. Significant economic improvement is unlikely in 2011.The Spanish construction industry was one of the first to feel the effects of the economic crisis in 2008. The collapse of the domestic construction market continued into 2010. Together with high levels of public debts, the pace of economic and construction sector recovery is expected to be slow.
- The market segments gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks.
- The relatively high share of PE pipes is because Masa, one of the two market leaders in Spain, only produces PE pipes.
- Spain is a large producer of plastic pipes and fittings in the EU. It is the fourth largest, behind Italy and the UK, but ahead of France and Poland. Production in 2009 amounted to €1.0 billion, after an annual decline of 5.0% between 2005 and 2009.

- Major suppliers are Adequa-Urulita and Masa, followed at some distance by Uponor. The first two companies together dominate the gas and water market segments.
- As a result of a large drop in imports in 2009 (-31%) and 2010 (-32%), imports declined by 18% in the period 2006-2010, which was a higher decline than average development in the EU. Imports amounted to €153 million in 2010. Imports from DCs totalled €7.9 million in 2010. They dropped more slowly than total imports in the period under review, which led to a growth in their share (from 4.4 to 5.2%). Figure 1 shows the size, growth and share of plastic pipes and fittings imports from DCs per type.
- China accounted for 52% of all imports coming from DCs. China was followed by Turkey (19%), Serbia (11%), India (9.2%) and Croatia (3.0%). Of the main DC suppliers, Serbia experienced the highest growth (+256% per year), followed by India (42%) and Turkey (24%).
- The prices of imports (€2.8/kg) are lower than the average import price in the EU (€3.9/kg in 2010). The average price of imports from DCs (excl. China) was €3.9/kg in 2010 (€3.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment or plastic pipes and fittings market in general.

Figure 1 Spain's imports: size, growth and share of plastic pipes and fittings from DCs, by type, 2005-2009



Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors and producers. The best way to approach prospects is by attending trade fairs in Spain. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trade partners. Relevant country-specific sources to find prospects are:

- PROMA - http://www.bilbaoexhibitioncentre.com - environmental technologies trade fair, held biennially (even years in October) in Bilbao.
- Smagua - http://www.smagua.com - water treatment fair, held biennially (even years in March) in Zaragoza.
- Spanish Association of Manufacturers of Plastics Pipes and Accessories - http://www.asetub.es - click ' Empresas' to view members.

- Spanish Gas Association - http://www.sedigas.es - click on 'Asociación', then 'Empresas Asociadas', and 'Otras empresas' for potential trading partners.
- Subcontratación - http://www.cumbreindustrialytecnologica.com - annual subcontracting fair (September) in Bilbao.

Interesting players

Examples of interesting players are:

- Aquatecnic - http://www.aquatecnic.es - distributor, partly owned by Wavin from the Netherlands.
- Extruplesa - http://www.extruplesa.com - produces plastic pipes.
- Interflex - http://www.interflex.es - producer/distributor of pipes and tubes for electrical applications.
- Internationally operating plastic pipes and/or fittings producers include: Uponor(http://www.uponor.com), and Urulita -(http://www.adequa-tuberias.com).
- Jimten - http://www.jimten.com - distributor.
- Masa - http://www.masa.es -producer, part of Aliaxis from France.
- Plásticos Barcia - http://www.plasticosbarcia.com - producer of plastic pipes and fittings.
- Polytherm - http://www.polytherm.es - leading supplier of under-floor heating systems.
- Sanigrif - http://www.sanigrif.es - distributor/wholesaler.
- Saunier Duval - http://www.saunierduval.es - distributor/wholesaler.

Spain hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Tecnología del Agua - http://www.rbi.es/publicaciones - monthly water technology magazine.

Quarter-turn rotary valves in the Czech Republic

The Czech Republic is the fifteenth largest market in the EU. The market observed an annual growth of 4.2% in imports of quarter-turn rotary valves between 2006 and 2010, which was much higher than the average growth in the EU. Despite the relatively small market size, the Czech market represents one of the largest in Central and Eastern Europe. This CBI fact sheet aims to introduce valve suppliers from developing countries (DCs) to the Czech market for quarter-turn rotary valves.

Market characteristics

- The Czech Republic is a small market for quarter-turn rotary valves in the EU. It is the fifteenth largest, behind Finland and Romania, but ahead of Greece and Portugal. Apparent demand in 2009 totalled €21 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 4.8%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in the Czech Republic.

Table 1 Czech demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**17**	**24**	**21**	**4.8%**
ball and plug valves	11	16	11	0.2%
butterfly valves	6	8	10	11.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Czech market has an immature character and it mainly consists of new installations. In particular, the food and water industry are still developing. In the water industry, for example, many investments are still expected in the water collection and distribution and sewer networks in order to comply with the EU Water Directives by 2015.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.

- The Czech Republic is a small producer of quarter-turn rotary valves in the EU. It is the eleventh largest, behind Belgium and Sweden, but ahead of Austria and Poland. Production in 2009 amounted to €32 million, after an annual growth of 17% between 2005 and 2009.
- Despite a drop in imports in 2009, imports grew by 4.2% in the period 2006-2010, which was much higher than average development in the EU. Imports amounted to €25 million in 2010. Imports from DCs totalled €1.4 million in 2010 showing a growth which was slightly slower than total imports in the period under review, which led to a decrease in their share (from 6.3 to 5.9%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 85% of all imports coming from DCs. China was followed by Croatia (14%), Malaysia (0.6%) and Turkey (0.5%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€15/kg) are higher than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €9.7/kg in 2010 (€7.2/kg in the EU). Price remains very important in this country, as in other Central and Eastern European countries. A first selection is often based on the price.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Czech Republic's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	DC share in 2010
Total	**21**	**25**	**25**	**1.3**	**2.3**	**1.4**	**4.2%**	**2.5%**	**5.9%**
butterfly valves	7	10	10	0.5	0.5	0.7	7.2%	9.3%	7.8%
ball and plug valves	14	16	15	0.8	1.8	0.7	2.5%	-2.8%	4.7%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the Czech Republic or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Czech Pump Manufacturers Association - http://www.cpma-svc.org - see 'Members'.
- European Databank - http://www.edb.cz - Czech company databank.
- Wer liefert was? - http://www.wlw.cz - online trade directory. Search by product name.
- Aqua Set - http://www.aquaset.cz - water treatment trade fair, annually (March) in Prague.
- Envibrno & Vodovody-Kanalizace - http://www.bvv.cz/envibrno-gb - trade fair for water and wastewater treatment, held annually (May) in Brno.
- For Industry - http://www.forindustry.cz - engineering fair, annually (April) in Prague.
- MSV - http://www.bvv.cz/msv-gb - process engineering fair, held annually (September) in Brno.
- Trade Fairs Brno - http://www.bvv.cz - find an overview of all trade fairs in Brno.

Interesting players

Examples of interesting players are:

- ABO valve - http://www.abovalve.eu - producer of ball, butterfly and other types of valves.
- Arako - http://www.arako-rotary valves.com - producer of ball valves and other types.
- Armatury - http://www.armaturygroup.cz - producer of rotary valves and other types.
- Fluidtechnic Bohemia - http://www.fluidbohemia.cz - distributor of ball and plug valves and other types.
- Heckl - http://www.heckl.cz - stockholding distributor of products for the water industry, including rotary valves.
- Interfluid - http://www.interfluid.cz - distributor of rotary valves and other types.
- MSA - http://www.msa.cz/en - producer of ball valves and other types. MSA is probably the largest Czech valve producer. This company also offers a vendor list (downloadable from the website) with companies that have approved MSA valves for their process installations.
- IBC Praha - http://www.ibcpraha.cz - producer of rotary valves and other types of valves.
- Severočeská armaturka - http://www.sca.cz - producer of butterfly valves and other types of valves.

The Czech Republic hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Czech Business Weekly - http://www.cbw.cz - weekly general business magazine.
- Czech Gas Union (CPU) - http://www.cpu.cz - gas association.
- Czech Statistical Office - http://www.czso.cz - facts and figures on the Czech industry.
- Gas - http://www.cgoa.cz/en/gas-magazine/on-gas.ep - monthly gas magazine.
- Konstrukce - http://www.konstrukce.cz - bimonthly engineering magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.htm for practical tips on business culture and etiquette.

Quarter-turn rotary valves in Denmark

Denmark is a medium-sized market for quarter-turn rotary valves in the EU. It is the eighth largest market in the EU. Although total import declined during 2006-2010, imports from developing countries (DCs) showed a modest, but positive growth. This CBI fact sheet aims to introduce valve suppliers from DCs to the quarter-turn rotary valves market in Denmark.

Market characteristics

- Denmark is a medium-sized market for quarter-turn rotary valves in the EU. It is the eighth largest, behind the Netherlands and Belgium, but ahead of Sweden and Austria. Apparent demand in 2009 totalled €43 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -7%. Refer to Table 1 for more information.

Table 1 Spanish demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**58**	**69**	**43**	**-7.0%**
ball and plug valves	51	61	37	-7.3%
butterfly valves	7	8	6	-4.7%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Danish market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will be the continuously high investments in the gas pipeline and power generation network.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- Denmark is a small producer of quarter-turn rotary valves in the EU. It is the seventh largest, behind the Netherlands and the UK, but ahead of Finland and Belgium. Production in 2009 amounted to €59 million, after an annual decline of 5.0% between 2005 and 2009.
- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain some power because of their greater ability to innovate and manufacture low-volume products.

- As a result of a drop in imports in 2009 and 2010, imports declined by 7.3% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €43 million in 2010. Imports from DCs totalled €1.3 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 2.0 to 2.9%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 74% of all imports coming from DCs. China was followed by India (21%), Croatia (2.7%), Turkey (2.5%) and Vietnam (0.2%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€16/kg) are relatively high compared to the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €12/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Denmark's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**59**	**61**	**43**	**1.2**	**2.6**	**1.3**	**-7.3%**	**2.3%**	**2.9%**
butterfly valves	9	7	6	0.3	0.7	0.7	-7.8%	19.6%	10.3%
ball and plug valves	50	54	37	0.8	1.9	0.6	-7.2%	-7.4%	1.7%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Denmark or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Danish chamber of commerce - http://www.danskerhverv.com - industry news, events and the chamber can assist your company in finding a potential Danish business partner.
- Danish energy industries federation - http://www.ei.di.dk - networking and matchmaking.
- Danish petroleum industry association - http://www.oil-forum.dk - click on 'Om EOF' (About EOF), and click on 'Medlemmer' (members).
- Danish water forum - http://www.danishwaterforum.dk - click on 'Members' and on 'Manufacturers' for a list of companies active in the Danish water technology sector.
- HI Industri - http://www.hi-industri.dk - industry trade fair, held biennially (uneven years in September) in Herning.

Interesting players

Examples of interesting players are:

- AVK International - http://www.avk.dk - one of the leading valves producers in the EU, headquartered in Denmark. AVK also produces butterfly valves.
- Danfoss - http://www.danfoss.com - one of the leading industrial automation producers in the EU and a major producer of rotary valves, headquartered in Denmark.
- Glynwed - http://www.glynwed.dk - distributor of rotary valves, other valves and other process related equipment, part of Aliaxis Group from Belgium.

- PNE - http://www.pne-teknik.dk - stockholding distributor of rotary valves, other types of valves and other industrial products.
- Prometal - http://www.prometal.dk - stockholding distributor of rotary valves, other types of valves and other industrial products.
- Dansk Ventil Center - http://www.dvcas.dk - production of rotary valves and other types. DVC was acquired by Eirks in 2011.
- Valtor Offshore - http://www.valtor.com - Danish market leader in valve supply to the offshore industry. Valtor was acquired by Eriks in 2011.

Denmark hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Danish Energy Companies - http://www.danishenergyassociation.com - energy sector representative, among others publishing the biweekly magazine 'El & Energi'.
- Confederation of Danish Industries - http://www.di.dk - central association.
- Danish District Heating Association - http://www.dff.dk.
- Danish Water and Waste Water Association (DWWA) - http://www.danva.dk - national association of water and waste water utilities.
- Ingeniøren - http://ing.dk - weekly magazine on science and technology.
- Jern- og Maskinindustrien - http://www.jernindustri.dk - online technical magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Proces-Teknik - http://www.proces-teknik.dk - monthly process magazine.
- Teknisk Nyt (Tech News) - http://www.techmedia.dk - magazine for the mechanical engineering and process industries, published in English 15 times a year.

CBI
Ministry of Foreign Affairs of the Netherlands

Quarter-turn rotary valves in France

France is the EU's second largest market for quarter-turn rotary valves. Between 2006 and 2010, imports from developing countries (DCs) showed a good growth and in 2010 they accounted for 23% of all French imports of quarter-turn rotary valves. Nevertheless, the French rotary valve market is mature and highly competitive, which makes it a challenge for DC exporters to enter.

Market characteristics

- France is a large market for quarter-turn rotary valves in the EU. It is the second largest, behind Italy, but ahead of Germany and the UK. Apparent demand in 2009 totalled €220 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -0.8%. Refer to Table 1 for more information.

Table 1 French demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**227**	**346**	**220**	**-0.8%**
ball and plug valves	133	206	147	2.4%
butterfly valves	93	140	73	-5.9%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; several investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by continuously high investments in the power generation network.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- France is a large producer of quarter-turn rotary valves in the EU. It is the third largest, behind Italy and Germany, but ahead of Spain and the Netherlands. Production in 2009 amounted to €330 million, after an annual decline of 1.0% between 2005 and 2009.
- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain

some power because of their greater ability to innovate and manufacture low-volume products.

- French companies have specialised in expensive automated valves and actuators. These valves include technologically advanced automated valves with a better efficiency through advanced predictive and preventative maintenance abilities and through improved controls by pneumatic, solenoid, electric, hydraulic or digital mechanisms. These valves can be used in remote or hazardous environments, such as in oil pipelines in the Arctic or within nuclear power plants. Such specialty products provide a growing market segment for German valve producers, but they also incur costs in the form of materials research (e.g. plastics, ceramics), product design and testing, and more sophisticated production methods. So far, producers in DCs have not been able to supply such special valves.
- Despite a drop in imports in 2009, imports grew by 5.7% in the period 2006-2010, which was much higher than average development in the EU. Imports amounted to €143 million in 2010. Imports from DCs totalled €33 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 19 to 23%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 98% of all imports coming from DCs. China was followed by Turkey (1.6%), India (0.2%), South Africa (0.2%) and Croatia (0.2%). Of the main DC suppliers, only China experienced growth (+12% per year).
- The prices of imports (€9.4/kg) are lower than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €7.0/kg in 2010 (€7.2/kg in the EU).

Table 2 France's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	DC share in 2010
Total	**115**	**153**	**143**	**21**	**29**	**33**	**5.7%**	**11.1%**	**22.8%**
ball and plug valves	87	105	96	16	22	23	2.7%	8.3%	23.5%
butterfly valves	28	48	47	5	7	10	13.8%	19.2%	21.3%

Source: Eurostat (2011)

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of metal pipes or fittings), agents and direct sales. The distributor is less important in relation to complex products than standard products, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in France or leading EU trade fairs in other EU countries (such as Tube in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- French Gas Association - http://www.afgaz.fr/uk/index.php - click on 'AFG', 'Presentation' and then on 'Members'.
- ABC Direct - http://www.abc-d.fr - type a keyword and search for companies.
- CFIA - http://www.cfiaexpo.com - food processing technology fair, annually in Rennes (March) and biennially in Metz (October).
- ESOPE (Chaudronnerie) - http://www.chaudronnerie-expo.com - pressure equipment fair, triennially (September/October) in Paris. The next event will be in 2013.

- Industrie Paris - http://www.industrie-expo.com - industrial design and production fair, annually (March), even years in Paris, odd years in Lyon.
- Midest - http://www.midest.com - annual industrial subcontracting fair (November), Paris.
- Pollutec - http://www.pollutec.com - environmental technology, annually in November, in Lyon (even year) and Paris (odd year).
- Provrac - http://www.provrac.com - online directory of French providers of equipment. Click on 'Pneumatic conveying', then 'pipes' for an overview of pipe suppliers.

Interesting players

Examples of interesting players are:

- Corri-Servais - http://www.corri-servais.fr - producer of ball and other types of valves.
- Fluid Control Europe - http://www.fce.fr - production and distribution of rotary and other types of valves and fittings.
- PLS France - http://www.pls-france.com - distributor of rotary and other types of valves and process related equipment.
- Sodime - http://www.e-sodime.com - distributor of rotary valves, other types of valves and other process related equipment for the food processing industry.
- Sud Robinetterie Industrie - http://www.sri.fr - producer of ball valves and other types of valves.
- Tech-Valves - http://www.techvalves.fr - distribution of rotary and other valves.
- Tecofi - http://www.tecofi.fr - producer of rotary and other types of valves.
- Vannes Lefebvre - http://www.lefebvre.fr -producer of butterfly and other types of valves.

France hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Assembly of French Chambers of Commerce and Industry - http://www.acfci.cci.fr.
- French Trade Association of Equipment Manufacturers for Construction, Infrastructures and Metallurgical Industries - http://www.cisma.fr.
- Hydroplus - http://www.hydroplus.info - water and wastewater magazine, 8 issues a year.
- Industrie et Technologies - http://www.industrie-technologies.com - online industry magazine, also offers a printed monthly version.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- La Revue de Metallurgie - http://www.revue-metallurgie.org - monthly metal magazine.
- L'Usine Nouvelle - http://www.usinenouvelle.com - weekly industrial magazine.
- Magazine Liquides - http://www.somia-editions.com/liquides - bimonthly liquids processing magazine.
- Matériaux et Techniques - http://www.mattech-journal.org - bimonthly trade magazine.
- Process Magazine - http://www.process-magazine.com - monthly issue on food processing.

Quarter-turn rotary valves in Germany

Germany is the third largest market for quarter-turn rotary valves in the EU. Between 2006 and 2010, imports from developing countries (DCs) showed a good growth and in 2010 they accounted for 21% of all German imports of rotary valves. Nevertheless, the German rotary valve market is mature and highly competitive, which makes it a challenge for exporters from DCs to enter. This CBI fact sheet aims to introduce valve suppliers from DCs to the German quarter-turn rotary valves market.

Market characteristics

- Germany is a large market for quarter-turn rotary valves in the EU. It is the third largest, behind Italy and France, but ahead of the UK and Spain. Apparent demand in 2009 totalled €177 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -4.2%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in Germany.

Table 1 German demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**211**	**249**	**177**	**-4.2%**
ball and plug valves	169	194	107	-10.8%
butterfly valves	42	55	70	13.9%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The German market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will be the continuously high investments in the gas pipeline and power generation network.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- Germany is a large producer of quarter-turn rotary valves in the EU. It is the second largest, behind Italy, but ahead of France and Spain. Production in 2009 amounted to €809 million, after an annual growth of 12% between 2005 and 2009.

- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain some power because of their greater ability to innovate and manufacture low-volume products.
- German companies have specialised in expensive automated valves and actuators. These valves include technologically advanced automated valves with a better efficiency through advanced predictive and preventative maintenance abilities and through improved controls by pneumatic, solenoid, electric, hydraulic or digital mechanisms. These valves can be used in remote or hazardous environments, such as in oil pipelines in the Arctic or within nuclear power plants. Such specialty products provide a growing market segment for German valve producers, but costs are also incurred in the form of materials research (e.g. plastics, ceramics), product design and testing, and more sophisticated production methods. So far, producers in DCs have not been able to supply such special valves.
- Despite a drop in imports in 2009 and 2010, imports grew by 2.3% in the period 2006-2010, which was higher than average development in the EU. Imports amounted to €221 million in 2010. Imports from DCs totalled €47 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 12 to 21%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 87% of all imports coming from DCs. China was followed by Thailand (6.3%), Croatia (2.3%), Turkey (2.2%) and India (1.2%). Of the main DC suppliers, Turkey experienced the highest growth (+46% per year), followed by Thailand (45%) and China (18%).
- The prices of imports (€12/kg) are higher than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €7.1/kg in 2010 (€7.2/kg in the EU).

Table 2 Germany's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**202**	**275**	**221**	**24**	**53**	**47**	**2.3%**	**17.9%**	**21.4%**
ball and plug valves	158	199	167	20	33	34	1.4%	13.8%	20.4%
butterfly valves	44	75	54	4	21	13	5.2%	33.6%	24.6%

Source: Eurostat (2011)

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Association of German Engineering - http://www.vdma.com - go to 'VDMA Association' and click on 'Member Companies'.
- Association of Steam Boiler, Pressure Vessel and Piping Manufacturers - http://www.fdbr.de - click on 'Mitglieder'.
- Association of the German Petroleum Industry - http://www.mwv.de - news and statistics. go to 'über uns' and click on 'Mitglieder' for a list of members.

- Chemi.de - http://www.chemie.de - trade directory. Type product name in the search cell.
- Federal Association of the German Gas and Water Industry - http://www.bdew.de - click on 'BDEW', then 'Mitgliederübersicht' (members overview).
- German Water Partnership - http://www.germanwaterpartnership.de - go to 'About us' and click on 'Members'.
- Wer liefert was? - http://www.wlw.de - German company database.
- Achema - http://www.achema.de - process industry fair, triennially (June) in Frankfurt. Next event in 2012. Exhibitor catalogue - http://woice-content2.dechema.de.
- AMB - http://www.messe-stuttgart.de/amb - metalworking fair, held biennially in Stuttgart (even years in September/October).
- Hannover Messe - http://www.hannovermesse.de - industrial fair, held annually (April) in Hannover.
- Ifat Entsorga - http://www.ifat.de - biennial trade fair for water, sewage, waste and raw materials management, held every even year (September) in Munich.
- Valve World - http://www.valveworldexpo.com - valve fair, in even years (November) in Düsseldorf.
- Wasser Berlin - http://www.wasser-berlin.com - water and gas fair, triennially (May).
- Z - http://www.zuliefermesse.de - subcontracting trade fair, annually (March) in Leipzig.

Interesting players

Examples of interesting players are:

- ARI Armaturen - http://www.ari-armaturen.de - manufacturer of butterfly and other types of valves.
- AVAG - http://www.avag-pumpen.de - distributor of ball valves and other pipe related process equipment.
- Heco - http://www.heco.de - producer and stockholding distributor of stainless steel ball and other valves and pipes related equipment.
- Horst Kürvers - http://www.kurvers.com - stockholding distributor of rotary and other types of valves.
- Klinger-Schoeneberg - http://www.klinger-schoeneberg.de - manufacturer and distributor of rotary and other types of valves, specialised in ball valves.
- KSB - http://www.ksb.com - one of the leading EU valves producers, from Germany. KSB produces virtually all types of valves thinkable.
- Heinrich Lauterbach - http://www.lauterbach-gmbh.de - stockholding distributor of ball valves and other pipe related process equipment.
- Mehner - http://www.mehner-gmbh.de - distributor of a wide range of valves and other pipe related process equipment, among which rotary valves.

Germany hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of German Engineers - http://www.vdi.de - provides engineering guidelines.
- Chemie Technik - http://www.chemietechnik.de - monthly chemical processing magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.

Quarter-turn rotary valves in Italy

Italy represents the EU's largest market for quarter-turn rotary valves. Imports from DCs accounted for around 27% of total rotary valve imports, with a value of €18 million in 2010. This CBI fact sheet aims to introduce valve suppliers from developing countries (DCs) to the Italian quarter-turn rotary valves market.

Market characteristics

- Italy is the largest market for quarter-turn rotary valves in the EU, ahead of France and Germany. Apparent demand in 2009 totalled €136 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -25%. Refer to Table 1 for more information on the several types used in Italy.

Table 1 Italian demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**423**	**405**	**136**	**-24.6%**
ball and plug valves	393	371	100	-29.0%
butterfly valves	30	35	37	5.3%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The market segments oil, gas and industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; many investments are still expected in the water collection and distribution and sewer networks.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- Italy is the largest producer of quarter-turn rotary valves in the EU, ahead of Germany and France. Production in 2009 amounted to €1.1 billion, after an annual growth of 7.4% between 2005 and 2009.
- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain some power because of their greater ability to innovate and manufacture low-volume products.
- Italian companies specialise in expensive automated valves and actuators. These valves include technologically advanced automated valves with a better efficiency through advanced predictive and preventative maintenance abilities and through improved

controls by pneumatic, solenoid, electric, hydraulic or digital mechanisms. These valves can be used in remote or hazardous environments, such as in oil pipelines in the Arctic or within nuclear power plants. Such specialty products provide a growing market segment for German valve producers, but they also incur costs in the form of materials research (e.g. plastics, ceramics), product design and testing, and more sophisticated production methods. So far, producers in DCs have not been able to supply such special valves.

- Despite a drop in imports in 2009 and 2010, imports grew by 1.6% in the period 2006-2010, which was a little bit higher than average development in the EU. Imports amounted to €68 million in 2010. Imports from DCs totalled €18 million in 2010. They grew slightly more slowly than total imports in the period under review, which led to a decrease in their share (from 28 to 27%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 87% of all imports coming from DCs. China was followed by Croatia (5.2%), India (2.9%) and Turkey (2.7%). Of the main DC suppliers, only Croatia experienced growth (+40% per year).
- The prices of imports (€9.5/kg) are lower than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €8.2/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Italy's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**64**	**84**	**68**	**18**	**33**	**18**	**1.6%**	**0.4%**	**26.6%**
ball and plug valves	34	46	33	9	22	10	-0.7%	1.7%	28.9%
butterfly valves	30	37	35	9	11	8	4.1%	-0.9%	24.5%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to promote products to prospects is by attending trade fairs in Italy or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Federation of the Italian Associations of Mechanical and Engineering Industries - http://www.anima-it.com - choose the English language and click on 'members directory'.
- Italian Association for Food Producing, Processing and Preservation Manufacturers - http://www.assofoodtec.it - click on 'associati e produzione' and 'Elenco Aziende'.
- Italian Association of Valve and Fitting Manufacturers - http://www.associazioneavr.it - click on 'associati' and on 'elenco associati'.
- Italian Federation of Agents - http://www.fnaarc.it - click on 'agents search'.
- Water Gas - http://www.watergas.it - business portal for Italian gas and water companies. They also publish business directory books: 'GasAgenda' and 'AquaAgenda'.
- H2O-Accadueo http://www.accadueo.com - trade fair for water distribution and treatment, held every even year (May), in Ferrara.

- Geofluid - http://www.geofluid.it - trade fair for technology and equipment for prospecting, extracting and conveying underground fluids, held every even year (October), in Piacenza.
- Made in Steel - http://www.madeinsteel.it - steel fair, held every odd year (March), in Brescia.
- Subfornitura - http://www.senaf.it/fiera_eng.asp?fieraid=116 - subcontracting industrial processing fair, annually (March) in Parma.

Interesting players

Examples of interesting players are:

- Calzoni Hydro - http://www.rivacalzoni.it - producer of butterfly and other types of valves and pipe related equipment.
- Dafram - http://www.dafram.it - producer of floating ball and other types of ball valves.
- Enolgas - http://www.enolgas.it - producer of a wide range of ball valves.
- Fail - http://www.fail.it - stockholding distributor of rotary and other valves and pipes related equipment.
- Fratelli Pettinaroli - http://www.pettinaroli.com/ita.htm - producer of
- Ghipson - http://www.ghibson.it - producer of butterfly and check valves.
- Magival - http://www.magival.it - producer of ball valves.
- Orion Valves - http://www.orionrotaryvalves.com - producer of three-way ball valves and other types of valves.
- Steeltrade - http://www.steeltrade.it - stockholding distributor of rotary and other valves and pipes related equipment.
- Tormene Gas Technology - http://www.tormene.it - producer of ball valves and natural gas treatment equipment.
- Varisco - http://www.variscosrl.com - stockholding distributor of rotary and other valves and pipes related equipment.

Italy hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Confederation of Italian industry - http://www.confindustria.it.
- Federation of the Energy and Water Industries - http://www.federutility.it.
- Italian Chamber of Commerce - http://www.unioncamere.it.
- Italian Petroleum Union - http://www.unionepetrolifera.it.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Reti Idriche & Gas - http://www.pubblindustria.info - bimonthly water and gas magazine.

CBI
Ministry of Foreign Affairs of the Netherlands

Quarter-turn rotary valves in the Netherlands

The Netherlands is considered a large quarter-turn rotary valve market in the EU, ranking as the sixth largest. The country imported €15 million of quarter-turn rotary valves from developing countries (DCs) in 2010, after considerable growth in the period 2006-2010. It resulted in a share of 20% for quarter-turn rotary valves from DCs.

Market characteristics

- The Netherlands is a large market for quarter-turn rotary valves in the EU. It is the sixth largest, behind the UK and Spain, but ahead of Belgium and Denmark. Apparent demand in 2009 totalled €95 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 32%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in the Netherlands.

Table 1 Dutch demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**31**	**144**	**95**	**31.9%**
ball and plug valves	4	64	64	102.9%
butterfly valves	28	81	31	2.6%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Dutch market has a mature character and mainly consists of replacements and the maintenance of existing equipment. One major driver of demand in the years to come will be the continuously high investments in the gas pipeline and power generation network. In addition, it should be noted that - despite it only being a small country - the Netherlands is home to one of the lengthiest pipeline networks in the EU.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition to this, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications.
- The Netherlands is a medium-sized producer of quarter-turn rotary valves in the EU. It is the fifth largest, behind France and Spain, but ahead of the UK and Denmark. Production in 2009 amounted to €158 million, after an annual growth of 27% between 2005 and 2009.
- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain

some power because of their greater ability to innovate and manufacture low-volume products.

- Despite drops in imports in 2009 and 2010 (as much as -19% in 2010), imports grew by 2.5% in the period 2006-2010, which was much higher than average development in the EU. Imports amounted to €76 million in 2010. Imports from DCs totalled €15 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 9.6 to 20%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 95% of all imports coming from DCs. China was followed by Turkey (1.8%), India (1.5%) and Thailand (1.2%). Of the main DC suppliers, only China experienced growth (+23% per year).
- The prices of imports (€12/kg) are higher than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €6.9/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Netherlands' imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	DC share in 2010
Total	**69**	**104**	**76**	**7**	**14**	**15**	**2.5%**	**22.8%**	**19.7%**
butterfly valves	26	37	31	3	5	8	4.1%	33.7%	27.2%
ball and plug valves	43	67	46	4	10	7	1.5%	13.7%	14.7%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in the Netherlands or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- ABC Direct - http://www.abcdirect.nl - business directory.
- Dutch Association of importers and manufacturers of industrial accessories - http://www.vifia.nl - click on 'ledenlijst'.
- Dutch Oil & Gas Catalogue 2011 - http://www.iro-noc.nl - click on 'search a company'.
- Water Treatment Industry Association - http://www.aquanederland.nl - click on 'leden'.
- Water Forum - http://www.waterforum.net - go to 'Marktwijzer' and search for 'afsluiters'.
- Industrial Processing - http://www.industrialprocessing.nl - process equipment fair, biennially (even years in October) in Utrecht.
- Industry and Environment - http://www.easyfairs.com - water, waste and energy fair, annually (May) in Rotterdam.
- PPT Food - http://www.easyfairs.com - annual food equipment fair (November) in Zwolle.

Interesting players

Examples of interesting players are:

- Dylan - http://www.dylangroup.com - international distributor of a wide range of valves, fittings, flanges and pipes, from the Netherlands.
- Econosto - http://www.econosto.com - distributor of a wide range of valves and other pipe related equipment. Part of Eriks (http://www.eriks.com) from the Netherlands.
- Holland Valve Solutions - http://www.hvs-rotary valves.eu - manufacturer.
- Hoogeboom - http://www.hoogenboomkleppen.nl/EN/index.htm - manufacturer of industrial butterfly valves for gaseous media.
- Imbema Denso - http://www.imbemadenso.nl - distributor of butterfly and other types of valves and pipe related equipment.
- Ingenieursburo Gommer - http://www.gommer.nl/index_en.html - distributor of ball and other types of valves and pipe related equipment.
- MRC Transmark - http://www.transmark-fcx.com - international distributor of a wide range of valves, from the US.
- Noxon Stainless - http://www.noxon.nl -distributor of ball and other types of valves and pipe related equipment; part of the IMS Group from France.
- Valveco - http://www.valveco.com - international distributor of a wide range of valves from the Netherlands.
- Van Leeuwen Pipe and Tube Group - http://www.vanleeuwen.com - distributor of rotary and other valves and pipes and pipe related equipment.
- Wouter Witzel - http://www.wweurovalve.nl - producer of butterfly valves, part of PCC from the US.

The Netherlands hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Association of Dutch Suppliers in the Oil and Gas Industry (IRO) - http://www.iro.nl.
- Dutch Association of Subcontracting Industries - http://www.nevat.nl.
- Dutch Oil and Gas Exploration and Production Association - http://www.nogepa.nl.
- Fluids Processing - http://www.fluidsprocessing.nl - bimonthly trade magazine.
- Holland Marine Equipment Association - http://www.hme.nl.
- Industrial Maintenance - http://www.industrialmaintenance-vakblad.nl - magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- PetroChem - http://www.petrochem.nl - monthly petrochemical magazine.
- PompNL - http://www.pompnl.nl - monthly pumps and rotary valves magazine.

Quarter-turn rotary valves in Poland

Poland is the eleventh largest market in the EU. Apparent demand, as well as production output, of quarter-turn rotary valves in Poland showed impressive growth between 2005 and 2009. Being a new EU member, the Polish water sector will have to undergo several process upgrades in order to match the EU's quality standards and regulations. These changes provide interesting opportunities for exporters from developing countries (DCs). This CBI fact sheet aims to introduce valve suppliers from DCs to the Polish quarter-turn rotary valves market.

Market characteristics

- Poland is a medium-sized market for quarter-turn rotary valves in the EU. It is the eleventh largest, behind Sweden and Austria, but ahead of Hungary and Finland. Apparent demand in 2009 totalled €63 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 32%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in Poland.

Table 1 Polish demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**20**	**41**	**63**	**32.2%**
ball and plug valves	6	22	47	64.7%
butterfly valves	14	18	15	2.2%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Polish market has an immature character and it consists of new installations to a large extent. In particular, the food and water industry are still developing. In the water industry, for example, many investments are still expected in the water collection and distribution and sewer networks in order to comply with the EU Water Directives by 2015. Furthermore, Poland has a relatively large gas market segment. This is because Poland is a large country and home to the sixth largest natural gas pipeline network in the EU.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.

- Poland is a small producer of quarter-turn rotary valves in the EU. It is the thirteenth largest, behind the Czech Republic and Austria, but ahead of Hungary and Slovenia. Production in 2009 amounted to €26 million, after an annual growth of 29% between 2005 and 2009.
- Despite a drop in imports in 2009 and 2010, imports grew by 0.8% in the period 2006-2010, which was a little bit lower than average development in the EU. Imports amounted to €65 million in 2010. Imports from DCs totalled €17 million in 2010. Contrary to total imports, the development of DC imports was negative in the period under review, which led to a decrease in their share (from 27 to 25%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 97% of all imports coming from DCs. China was followed by Croatia (1.6%), Turkey (1.0%) and Ukraine (0.2%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€9.9/kg) are lower than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €7.2/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Poland's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**63**	**82**	**65**	**17**	**23**	**17**	**0.8%**	**-1.0%**	**25.5%**
ball and plug valves	46	61	47	17	22	16	0.8%	-1.5%	33.1%
butterfly valves	17	21	18	1	1	1	0.7%	7.9%	5.4%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Poland or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Polish LPG Association - http://www.pogp.pl - Click on 'Firmy czlonkowskie'.
- Ekotech - http://www.ekotech.targikielce.pl - (waste)water fair, held annually (March) in Kielce.
- Expo-Gas - http://www.expo-gas.pl - gas engineering fair, held in odd years (April) in Kielce.
- Polagra Tech - http://www.polagra-tech.pl - food processing technology fair, held annually (September) in Poznan.
- Stom - www.stom.targikielce.pl - metalworking and machining, held annually (March) in Kielce.
- Targi Wod-Kan - http://www.igwp.org.pl - water sector fair, held annually (May) in Bydgoszcz.
- Water and Sewage Industry TIWS - http://www.targikielce.pl - water sector fair, held every year (October) in Kielce.

Interesting players

Examples of interesting players are:

- AFT - http://www.aft.pl - distributor of a wide range of valves and pumps.
- Atmomat - http://www.atmomat.com.pl - distributor of a wide range of pipes and process equipment, among which rotary valves.
- Meprozet - http://www.meprozet.com.pl - produces a small range of valves, among which are ball valves. Meprozet's main products are pumps and fittings.
- Saga - http://www.saga.info.pl - distributor of a wide range of valves and pumps.
- Spinex - http://spinex.com.pl - distributor of a wide range of valves and other industrial products.
- Tehaco - http://www.tehaco.com.pl - producer of rotary and a few other types of valves.
- Valmark - http://www.valmark.pl - distributes rotary and other types of valves, pumps and food processing equipment.
- Zamkon - http://zamkon.pl - producer and distributor of butterfly and other types of valves.

Furthermore, Poland is also home to distribution facilities of foreign owned companies, such as Valveco (from the Netherlands). In total, Poland hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Polish Chamber of Commerce - http://www.chamberofcommerce.pl.
- Polish Chamber of the Exhibition Industry - http://www.polfair.pl - click on 'English' and on 'Exhibition Calendar'.
- Polish Market - http://www.polishmarket.com.pl - monthly general industry magazine.
- Polish Steel Association - http://www.hiph.com.pl.
- Pompy Pompownie - http://pompy.pompownie.com - quarterly magazine for pumps and rotary valves.

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Ministry of Foreign Affairs of the Netherlands

Quarter-turn rotary valves in Spain

Spain represents a large market for quarter-turn rotary valves, ranking fifth in the EU. Apparent demand grew by 10% per year during 2005-2009, and imports of rotary valves from developing countries (DCs) accounted for almost 40% of total imports in 2010. This CBI fact sheet aims to introduce valve suppliers from DCs to the quarter-turn rotary valves market in Spain.

Market characteristics

- Spain is a large market for quarter-turn rotary valves in the EU. It is the fifth largest, behind Germany and the UK, but ahead of the Netherlands and Belgium. Apparent demand in 2009 totalled €116 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 10%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in Spain.

Table 1 Spanish demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**78**	**66**	**116**	**10.5%**
ball and plug valves	36	12	65	15.7%
butterfly valves	42	54	51	5.2%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The market segments oil, gas and other industrial applications have a mature character and mainly comprise replacements and the maintenance of existing equipment. In contrast, the water treatment industry is still developing; many investments are still expected in the water collection and distribution and sewer networks. In addition, the next few years will also be marked by several investments in the gas pipeline and power generation network.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition to this, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- Spain is a medium-sized producer of quarter-turn rotary valves in the EU. It is the fourth largest, behind Germany and France, but ahead of the Netherlands and the UK. Production in 2009 amounted to €231 million, after an annual growth of 10% between 2005 and 2009.

- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain some power because of their greater ability to innovate and manufacture low-volume products.
- Despite a drop in imports in 2009 and 2010 (in 2009 even 16%), imports grew by 1.8% in the period 2006-2010, which was slightly higher than average development in the EU. Imports amounted to €80 million in 2010. Imports from DCs totalled €29 million in 2010. Their growth was slightly slower than total imports in the period under review, which led to a decrease in their share (from 38 to 37%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 98% of all imports coming from DCs. China was followed by India (0.7%), Croatia (0.6%) and Turkey (0.6%). There were no DC countries that experienced growth in the period under review.
- The prices of imports (€8.2/kg) are lower than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €6.1/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Spain's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**75**	**101**	**80**	**28**	**44**	**29**	**1.8%**	**1.0%**	**36.8%**
ball and plug valves	48	69	54	23	32	23	3.0%	-0.3%	43.2%
butterfly valves	27	32	26	5	12	6	-0.5%	6.8%	23.8%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Spain or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Spanish Association of Capital Goods Manufacturers - http://www.sercobe.es - find a list of associated firms by clicking on 'members'.
- Spanish Association of Iron Merchants - http://www.uahe.es - click on 'Asociados' (partners) and view members by province.
- Spanish Gas Association - http://www.sedigas.es - click on 'Asociación', then 'Empresas Asociadas', and 'Otras empresas' for potential trading partners.
- Barcelona Tecnologías de la Alimentación - http://www.bta-tecnoalimentaria.com - trade fair for the food industry, held every four years, next fair will be held in May 2012.
- Cumbre Industrial y Tecnológica - http://www.bilbaoexhibitioncentre.com - industry fair, held every year (September) in Bilbao.
- Smagua - http://www.smagua.com - water treatment fair, held biennially (even years in March) in Zaragoza.
- Subcontratación - www.bilbaoexhibitioncentre.com - in 'Fairs', select 'Subcontratación'; annual subcontracting fair (September) in Bilbao.

Interesting players

Examples of interesting players are:

- Acuster - http://www.acuster.com - manufactures rotary and other types of valves and pipe related equipment.
- CMC Hydro - http://www.cmchydro.es - producer of butterfly and other types of valves and products for the water processing industry.
- Grupo Compas - http://www.valvula.es - stockholding distributor of a wide range of valves.
- ICP valves - http://www.icp-valves.com - producer of ball and other types of valves.
- Inoxpa - http://www.inoxpa.com - producer of rotary valves and pumps.
- Seguin - http://www.sugein.com - distributes butterfly and other types of valves and pipe related equipment.
- Simosa - http://www.simosa.es - distributor of rotary and other types of valves and equipment to the oil processing industry.
- Tradinox - http://www.tradinox.es - stockholding distributor of stainless steel rotary valves and pipes and related equipment.
- Tubinox - http://www.tubinox.com - stockholding distributor of butterfly and other types of valves, pipes and fittings.

Spain hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Acermetal - http://www.acermetal.es - bi-weekly newsletter and quarterly steel magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Revista de Metalurgia - http://www.cenim.csic.es - monthly technical magazine.
- Spanish Association of the Metal Industry - http://www.confemetal.es.
- Tecnología del Agua - http://www.rbi.es/publicaciones - monthly water technology magazine.

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Quarter-turn rotary valves in Sweden

Sweden is a medium-sized market for quarter-turn rotary valves, ranking as the ninth largest market in the EU. Imports of rotary valves from developing countries (DCs) recorded positive growth during 2006-2010, and accounted for around 8.8% of total rotary valve imports in 2010. This CBI fact sheet aims to introduce valve suppliers from DCs to the rotary valves market in Sweden.

Market characteristics

- Sweden is a medium-sized market for quarter-turn rotary valves in the EU. It is the ninth largest, behind Belgium and Denmark, but ahead of Austria and Poland. Apparent demand in 2009 totalled €39 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -5.3%. Refer to Table 1 for more information on the types of quarter-turn rotary valves used in Sweden.

Table 1 Swedish demand for quarter-turn rotary valves, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**48**	**78**	**39**	**-5.3%**
ball and plug valves	40	64	29	-7.7%
butterfly valves	9	15	10	3.5%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Swedish market has a mature character and mainly consists of replacements and the maintenance of existing equipment.
- In the several end-user industries, the search for energy efficiency and the limitation of CO_2 and NO_x emissions has led to the increased use of innovative production techniques, resulting in better efficiency and less waste. One of the effects of this trend is that rotary valves have become more attractive as control valves for petrochemical companies. The main reason for this is that rotary valves have lower gland emissions than globe valves. In addition to this, one specific type of quarter-turn rotary valves, eccentric plug valves, is suitable for a very wide range of applications. As a result, eccentric plug valves have seen a relatively high growth in demand, especially for control valve applications in the oil and gas industry.
- Sweden is a small producer of quarter-turn rotary valves in the EU. It is the tenth largest, behind Finland and Belgium, but ahead of the Czech Republic and Austria. Production in 2009 amounted to €44 million, after an annual growth of 4.5% between 2005 and 2009.
- Large multinational producers are expected to continue to dominate the markets for valves in process industries, though smaller, specialised niche players should retain some power because of their greater ability to innovate and manufacture low-volume products.

- As a result of large drops in 2008 and 2009, imports declined by 5.6% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €45 million in 2010. Imports from DCs totalled €3.9 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 5.9% to 8.8%). Table 2 shows the size, growth and share of quarter-turn rotary valves imports from DCs per type.
- China accounted for 66% of all imports coming from DCs. China was followed by Turkey (26%), India (3.8%), Argentina (2.1%), Mexico (1.3%) and Indonesia (0.5%). Of the main DC suppliers, only Turkey experienced growth (+12% per year).
- The prices of imports (€14/kg) are higher than the average import price in the EU (€11/kg in 2010). The average price of imports from DCs (excl. China) was €7.3/kg in 2010 (€7.2/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Sweden's imports: size, growth and share of quarter-turn rotary valves from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**56**	**49**	**45**	**3.3**	**3.6**	**3.9**	**-5.6%**	**4.2%**	**8.8%**
ball and plug valves	46	37	35	2.0	2.7	3.2	-6.2%	12.1%	9.0%
butterfly valves	11	12	9	1.3	0.8	0.7	-3.1%	-13.3%	8.1%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of rotary valves), agents and direct sales. The distributor is less important in relation to complex rotary valves than standard rotary valves, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending trade fairs in Sweden or leading EU trade fairs in other EU countries (such as Tube and Valveworld in Dusseldorf). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Association of Swedish Engineering Industries - http://www.teknikforetagen.se/en/Membership/Sok-medlemmar - find members by searching with keyword.
- Swedish Agents Directory - http://www.agenturforetagen.se - database of Swedish agents. Click on 'Find company' and search by product name.
- Swedish Armature Industry - http://www.svenskarmaturindustri.se - click on 'in English' and 'member companies'.
- Swedish Association of Suppliers of Water Treatment Equipment - http://www.varim.se. Click on 'Medlemmar' for a list of members.
- Swedish Gas Association - http://www.gasforeningen.se - click on 'om energigas sverige' and 'medlemsföretag'.
- Swedish Petroleum Institute - http://www.spi.se - trade association for oil companies in Sweden; click 'Members' for a list of member companies.
- Elmia Subcontractor - http://www.elmia.se/subcontractor - subcontracting fair, held annually (November) in Jönköping. Includes match-making event (http://www.b2fair.com).
- ProcessTeknik / Scanautomatic - http://www.scanautomatic.se - trade fair for the process industry. Next venue: Gothenburg, October 2012.

- VA-mässan - http://www.vamassan.se - trade fair for water and wastewater technology, held annually (September) in Gothenburg.

Interesting players

Examples of interesting players are:

- Alfa Laval Nordic - http://www.alfalaval.com - producer of a wide range of valves and other process equipment with production and sales facilities all over the world, originally from Sweden.
- Armatec - http://www.armatec.com - stockholding distributor of rotary and other types of valves and pipe related process equipment.
- Industri Belos - http://www.belos.se - stockholding distributor of butterfly and other types of valves and pipe related equipment.
- Meson - http://www.meson.se - producer and stockholding distributor of a wide range of valves and fittings for the maritime industry.
- Nordic Pipe - http://www.nordicpipe.se - stockholding distributor of rotary and other types of valves and pipe related equipment.
- Protek - http://www.processteknik.se - distributor of rotary and other types of valves and pumps.
- Somas - http://www.somas.se - producer of rotary valves especially for the paper processing industry.
- Ventim - http://www.ventim.se - stockholding distributor of a wide range of valves, flanges and related products.

Sweden hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Energi Magasinet - http://www.energimagasinet.com - monthly energy magazine.
- Energi och Miljö - http://www.energi-miljo.se - monthly energy/environment magazine.
- ERA - http://www.era.se - power industry magazine, issued 10 times a year.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Ny Teknik - http://www.nyteknik.se - online technical magazine, weekly.
- Swedish Water & Wastewater Association - http://www.svensktvatten.se.
- Swedish Water Association - http://www.foreningenvatten.se.

Food processing equipment in France

France is an important importer of food processing equipment in the world and also represents the EU's largest market in terms of apparent demand. Nevertheless, the high competition in the French market represents a challenge for market entry. This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the French market of food processing equipment.

Market characteristics

- France is a large market for food processing equipment in the EU. It is the largest market in the EU, ahead of Italy and Germany. Apparent demand in 2009 totalled €1.2 billion. Compound annual average growth (CAGR) in the period under review (2005-2009) was 0.5%. Refer to Table 1 for more information.

Table 1 French demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**1,141**	**1,234**	**1,162**	**0.5%**
food and drinks	354	339	431	5.0%
dairy processing	179	238	216	4.8%
bakery and confectionery	245	278	144	-12.5%
meat processing	148	134	139	-1.5%
fermentation and brewery	78	66	79	0.3%
flour milling	70	60	71	0.4%
parts thereof	22	45	41	16.9%
fruit and nuts	38	48	33	-3.6%
agricultural products processing	4	7	6	13.1%
fat and oil	2	19	2	3.0%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- France has a large food processing sector and is one of the leading processors of agricultural and food products in the EU. The food processing machinery market is highly competitive and characterised by rapid technological advancements and tightening of environmental and hygiene regulations. Several producers, especially in the meat and dairy product segments, are addressing new changes and arising opportunities.
- France is a large producer of food processing equipment in the EU. It is the third largest, behind Italy and Germany, but ahead of the Netherlands and Spain. Production in 2009 amounted to €1.3 billion, after an annual decline of 1.0% between

2005 and 2009. The country is also one of the world's leading exporters of food processing machinery.

- France is one of the world's leading importers of food processing machinery. As a result of a large drop in imports in 2009 (-13%), imports declined by 0.9% in the period 2006-2010, which was a comparable decline as in the EU on average. Imports amounted to €495 million in 2010. Imports from DCs totalled €13 million in 2010. They dropped slightly faster than total imports in the period under review, which led to a decline in their share (from 2.7 to 2.6%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 24% of all imports coming from DCs. China was followed by Tunisia (22%), Brazil (12%), Algeria (12%), Turkey (9.0%), South Africa (4.4%) and Morocco (3.5%). Of the main DC suppliers, Algeria experienced the highest growth (+241% per year), followed by Malaysia (88%), China (15%), Morocco (11%) and Brazil (10%).
- The prices of imports (€19/kg) are higher than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €11/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 France's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**513**	**564**	**495**	**14.1**	**9.0**	**12.8**	**-0.9%**	**-2.3%**	**2.6%**
parts thereof	102	101	113	6.2	4.6	5.7	2.7%	-2.4%	5.0%
other food and drinks	26	23	17	1.1	0.3	1.7	-9.6%	12.0%	9.8%
dairy processing	68	76	46	0.1	0.4	1.3	-9.3%	88.3%	2.8%
bakery and confectionery	85	105	81	0.6	1.0	1.3	-1.0%	19.5%	1.6%
food	78	87	80	0.8	1.1	1.0	0.8%	6.0%	1.3%
meat processing	62	81	65	0.2	0.3	0.5	1.3%	24.0%	0.7%
fat and oil	6	3	3	3.1	0.0	0.5	-18.3%	-38.2%	16.0%
flour milling	11	10	13	1.2	0.2	0.4	4.4%	-21.9%	3.3%
fermentation and brewery	16	21	14	0.2	0.3	0.2	-2.5%	7.2%	1.6%
beverages	46	45	49	0.5	0.6	0.2	1.5%	-26.6%	0.3%
fruit and nuts	11	11	10	0.1	0.2	0.1	-2.8%	8.8%	0.9%
agricultural products processing	3	3	3	0.0	0.0	0.0	-0.3%	-	1.7%

Source: Eurostat (2011)

Trade channels and finding trading partners

The producer (subcontractor) of food processing equipment is the most important trade channel for the DC exporter. Agents and distributors play a minor role. The best way to approach prospects is by attending food or food processing trade fairs in France, especially IPA (http://www.ipa-web.com;- food process exhibition, held every even year (October) in Paris, or at the leading EU trade fair, namely Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennally (March) in Cologne, Germany. Many websites of trade fairs also contain the contact information of previous exhibitors. In addition, the Internet is a highly valuable source to find potential trading partners, including:

- ABC Direct - http://www.abc-d.fr - type a keyword and search for companies.

- CFIA - http://www.cfiaexpo.com - food processing technology fair, twice a year, once in Rennes (March) and biennially (October) in Metz.
- SIAL - http://www.sial.fr - trade fair for the food industry, held every odd year (October), Paris.
- European Sandwich & Snack Show - http://www.sandwichshows.com - trade exhibition for the food industry, including equipment, held yearly (February or March), Paris.
- Association of Food Industries (ANIA) - http://www.ania.net - represents national federations and regional associations in the French food industry. Click on 'Adherents' to view members.
- Europain - http://www.europain.com - trade fair for bakery and pastry-making industry, held every even year (March) in Paris. The fair also includes equipment for bakers, laboratories and kitchens.
- Intersuc - http://www.international-bakery-exhibition.com - trade fair for bakery, pastry, ice-cream, chocolate and confectionary, including machines and equipment, held every even year (March) in Paris.
- Vinitech - http://www.vinitech.fr - trade fair for the vine-growing and wine producing sector, held every even year (November) in Bordeaux.
- SIRHA - http://www.sirha.com - consumer and business-to-business exhibition for the food and bakery industry, held every odd year (January) in Lyon.

Interesting players

Examples of interesting players are:

- Mecatherm - http://www.mecatherm.fr - producer of bakery machinery.
- Italgi - http://www.infopasta.com - producer of pasta machines.
- Ali Comenda - http://www.alicomenda.fr - producer of food processing machinery.
- Bongard - http://www.bongard.fr - producer of break and pastry-making equipment.
- Bucher Vaslin - http://www.buchervaslin.com - producer of wine making machinery; headquartered in Switzerland, with a production facility in France.
- Chalvignac Prulho Distillation - http://chalvignac-prulho-distillation.com - produces distillation processing machinery.

France hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Acojur - http://www.acojur.com - legal information about commercial agents.
- Assembly of French Chambers of Commerce and Industry - http://www.acfci.cci.fr.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process Magazine - http://www.process-magazine.com - monthly issue on food processing.
- Process Worldwide - http://www.process.de - English industrial magazine for all sectors of the industrial process, issued six times per year.

Food processing equipment in Germany

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the food processing equipment market in Germany. It is the EU's third largest market for food processing equipment and imports from DCs grew impressively during 2006-2010. Despite the relatively high level of market competition, the market offers opportunities for equipment with superior processing technology that enables product quality improvement and margins.

Market characteristics

- Germany is a large market for food processing equipment in the EU. It is the third largest, behind France and Italy, but ahead of Spain and the UK. Apparent demand in 2009 totalled €1.1 billion. Compound annual average growth (CAGR) in the period under review (2005-2009) was 1.9%. Refer to Table 1 for more information.

Table 1 German demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**982**	**1,361**	**1,060**	**1.9%**
food and drinks	224	386	262	4.0%
parts thereof	168	242	257	11.3%
meat processing	249	224	210	-4.2%
fermentation and brewery	64	234	51	-5.6%
bakery and confectionery	73	115	123	14.1%
dairy processing	176	115	83	-17.0%
flour milling	20	16	46	22.4%
fat and oil	2	10	4	15.6%
fruit and nuts	4	8	10	25.7%
agricultural products processing	2	11	14	66.3%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The German food and drink industry has made a steady increase in turnover for many years. The industry made around €150 billion in 2010 and comprises around 5,800 companies. Meat products account for the largest share of the industry's turnover (20-25%), followed by dairy products (15-20%). Other important segments with a lesser share in total industry turnover include alcoholic beverages, confectionary, and bakery.
- Germany is a large producer of food processing equipment in the EU. It is the second largest, behind Italy, but ahead of France and the Netherlands. Production in 2009

amounted to €2.7 billion, after an annual growth of 0.8% between 2005 and 2009. In the confectionary machinery segment, Germany is also the world's largest producer and exporter of confectionary machinery, accounting for around 25% of the global production volume. In 2010, German production of confectionary machinery reached 550 million. The country is also one of the world's largest producers of food processing machinery.

- German confectionary manufacturers increasingly focus on improving product quality and margins. This leads to the need for superior processing technology, for instance machinery and equipment that requires low energy consumption, easy cleaning and short changeover times.
- The country has attracted a lot of the world's leading food, beverage and confectionary manufacturers, including Nestlé, Ferrero and Coca-Cola. Tchibo and Dr. Oetker are also large food producers in Germany.
- Germany is one of the world's leading importers of food processing machinery. Despite a large drop in imports in 2009 (17%), imports remained virtually stable at €622 million in the period 2006-2010. Imports from DCs totalled €36 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 3.3 to 5.9%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 70% of all imports coming from DCs. China was followed by Turkey (14%), Brazil (2.8%), Indonesia (1.7%), Croatia (1.6%), Thailand (1.4%) and Argentina (1.4%). Of the main DC suppliers, China experienced the highest growth (+29% per year), followed by Turkey (10%) and Brazil (10%).
- The prices of imports (€18/kg) are higher than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €8.5/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Germany's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**620**	**693**	**622**	**20.6**	**36.3**	**36.4**	**0.1%**	**15.2%**	**5.9%**
food	95	107	112	5.3	8.7	13.9	4.3%	27.2%	12.4%
parts thereof	105	153	119	3.0	5.0	4.3	3.2%	9.6%	3.6%
bakery and confectionery	89	113	97	2.8	3.9	3.8	2.0%	7.9%	4.0%
beverages	57	71	71	1.5	3.3	3.4	5.8%	22.0%	4.8%
meat processing	47	72	56	1.4	1.1	3.0	4.7%	21.2%	5.3%
fat and oil	15	15	7	2.6	8.3	2.2	-18.4%	-4.3%	33.7%
flour milling	21	16	25	0.3	0.6	2.0	3.9%	60.3%	8.2%
dairy processing	138	66	69	1.8	1.8	1.5	-15.9%	-4.6%	2.1%
other food and drinks	24	31	28	1.0	2.5	1.1	3.8%	2.9%	3.9%
fermentation and brewery	17	27	16	0.2	0.6	0.7	-1.2%	28.2%	4.2%
fruit and nuts	8	12	12	0.6	0.6	0.6	10.0%	-2.9%	4.6%
agricultural products processing	5	11	10	0.1	0.0	0.0	19.0%	-25.9%	0.2%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of food processing equipment), agents and direct sales. Most distributors also function as importers. Additionally, they are less important in relation to complex products than standard products. The best way to approach prospects is by attending food or food processing trade fairs in Germany, especially Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennaully (March) in Cologne. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- BB Guide - http://www.harnisch.com - Beverage and Brewing International Suppliers' Guide published by Dr. Harnisch. The website also offers a search engine for companies in the German food and beverage industry; click on 'bb guide - Beverage & Brewing', then 'Product Search' or 'Producer Search'.
- BRAU Beviale - http://www.brau-beviale.de - beverage industry, held every even year (November) in Nuremberg.
- IBA - http://www.iba.de - trade fair for bakery and confectionery, held triennially (September or October) in Munich. The next fair will be in 2012.
- IFFA - http://iffa.messefrankfurt.com - trade fair for the meat-processing industry, held triennially (May) in Frankfurt. The next fair will be in 2013.
- Intermopro - Intercool - Intermeat - http://www.intermeat.de - trade fair for the dairy and refrigeration industry, held every even year (September) in Düsseldorf.
- Interpack - http://www.interpack.com - processes and packaging fair, including machines and equipment for confectionery and bakery, held triennially (May) in Düsseldorf.
- ISM - http://www.ism-cologne.de - trade fair for sweets and biscuits, held annually (February) in Cologne.
- Pro Sweets Cologne - http://www.prosweets.com - trade fair for the confectionary industry, including equipment and machinery, held every even year (February) in Cologne.
- Südback - http://www.messe-stuttgart.de - trade fair for bakery and confectionary, held annually (October) in Stuttgart.
- Wer liefert was? - http://www.wlw.de - German company database.
- German Engineering Federation (VDMA) - http://www.vdma.org - represents 37 industry-specific professional associations, including the association 'Food Processing and Packaging Machinery of VDMA'. The website provides market information and features a search engine for finding German food processing equipment producers.

Interesting players

Examples of interesting players are:

- Diosna - http://www.diosna.com - bakery equipment.
- Fortuna - http://www.fortuna-schroeder.de - bakery machinery and equipment.
- Fritsch - http://www.fritsch-forum.com - baking machinery and equipment.
- Hebenstreit - http://www.hebenstreit.de - waffle machinery.
- Kronen - http://www.kronen-gmbh.de - fruits and vegetable processing machinery.
- MIWE - http://www.miwe.de - bakery machinery and automation.
- S+S Separation and Sorting Technology - http://www.sesotec.com - producer of separators for inspection of liquid and paste products.
- Unifiller - http://www.unifiller-europe.com - bakery equipment and machinery.
- Vemag - http://www.vemag.de - food processing equipment and machinery.
- Wiesheu - http://www.wiesheu.de - ovens.
- Wolf - Lothar - http://www.wolf-machines.de - chocolate and confectionery machines.

Germany hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Dei Ernährungsindustrie - http://www.prozesstechnik-online.de/dei - trade magazine for the food and beverage production industry, published ten times a year.
- Dr. Harnisch - http://www.harnisch.com - publisher of industrial magazines, including 'Food Marketing & Technology' (English biennially magazine for the food industry in Germany); 'Food Technologie' (German magazine for the food processing and packaging industry, published five times a year); and 'Getränke! Technologie & Marketing' (German magazine for the beverage industry. Published five times a year).
- Federal Association of German Food Industry (BVE) - http://www.bve-online.de - provides industry information.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Lebensmittel Technik - http://lebensmitteltechnik-online.de - online portal for the food and food processing industries.
- Lebensmittel Zeitung (LZ) - http://www.lebensmittelzeitung.net - weekly newspaper for professionals in the food production, distribution and trade.
- Process - http://www.process.de - monthly and online industrial magazine for all sectors of the industrial process, including food and beverage processing.

CBI
Ministry of Foreign Affairs of the Netherlands

Food processing equipment in Italy

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the second largest food processing equipment market in the EU: Italy. Italian apparent demand for food processing equipment recorded a positive growth of 3.3% during 2005-2009.

Market characteristics

- Italy is a large market for food processing equipment in the EU. It is the second largest, behind France, but ahead of Germany and Spain. Apparent demand in 2009 totalled €1.2 billion. Compound annual average growth (CAGR) in the period under review (2005-2009) was 3.3%.

Table 1 Italian demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**1,036**	**1,169**	**1,181**	**3.3%**
food and drinks	523	346	453	-3.5%
parts thereof	69	135	232	35.4%
fat and oil	78	55	117	10.5%
bakery and confectionery	130	249	85	-10.2%
dairy processing	86	104	91	1.2%
fruit and nuts	16	146	89	54.9%
fermentation and brewery	9	55	45	49.4%
meat processing	95	60	52	-14.1%
flour milling	27	11	8	-26.8%
agricultural products processing	3	7	11	37.3%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Italy is the largest producer in the EU, ahead of Germany and France. Production in 2009 amounted to €2.7 billion, after an annual growth of 2.1% between 2005 and 2009.
- Despite a drop in imports in 2009 (-7.4%), imports grew by 3.2% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €292 million in 2010. Imports from DCs totalled €28 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 6.0 to 9.7%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 38% of all imports coming from DCs. China was followed by Argentina (18%), Turkey (15%), South Africa (3.9%), Iran (3.9%), India (2.7%) and Morocco (2.3%). Of the main DC suppliers, Iran experienced the highest growth

(+170% per year), followed by Argentina (83%), India (53%), Morocco (40%), South Africa (32%), Tunisia (28%), Mexico (24%), Bosnia and Herzegovina (14%), Turkey (11%) and China (11%).

- The prices of imports (€17/kg) are higher than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €8.4/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Italy's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**257**	**295**	**292**	**15.5**	**17.0**	**28.4**	**3.2%**	**16.2%**	**9.7%**
fat and oil	7	2	12	0.6	0.5	6.2	16.1%	81.0%	51.6%
bakery and confectionery	37	56	47	5.8	3.5	5.9	6.2%	0.2%	12.6%
flour milling	5	10	11	0.3	0.8	4.0	20.3%	98.9%	38.2%
parts thereof	41	42	49	1.7	3.6	2.9	4.7%	14.1%	6.0%
other food and drinks	23	23	18	1.1	0.8	2.4	-6.3%	21.9%	13.4%
Food	35	41	45	0.6	1.0	2.3	6.2%	38.6%	5.1%
meat processing	40	33	32	0.7	0.6	1.7	-5.3%	23.1%	5.3%
beverages	18	31	20	3.0	4.9	1.2	2.4%	-20.6%	6.1%
dairy processing	34	30	28	0.5	0.4	0.7	-4.9%	11.1%	2.5%
fruit and nuts	5	8	10	0.6	0.3	0.6	19.5%	-3.8%	5.5%
agricultural products processing	1	1	10	0.0	0.0	0.2	65.8%	155.8%	2.4%
fermentation and brewery	12	17	12	0.6	0.6	0.2	-0.4%	-21.0%	1.8%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of food processing equipment), agents and direct sales. The distributor is less important in relation to complex food processing equipment than standard food processing equipment, but still remains the most important channel for DC exporters. The best way to approach prospects is by attending food or food processing trade fairs in Italy, especially CibusTec (http://www.cibustec.it; food processing and packaging technology fair, held every odd year (October) in Parma or at the leading EU trade fair, namely Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennaully (March) in Cologne, Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- AB Tech Expo - http://www.abtechexpo.it - baking and technology exhibition for bakery, pastry and confectionery, held for the first time in Milan, October 2010.
- Eurocarne - http://www.eurocarne.it - trade fair for the meat and meat processing industry, held triennially (May) in Verona.
- HOST - Pane, Pizza, Pasta - http://www.host.fieramilano.it - trade fair for the treatment and production of bread-based productions, including machines, ovens and equipment, held yearly (October) in Milan.
- Italian Association for Food Producing, Processing and Preservation Manufacturers - http://www.assofoodtec.it - click on 'associati e produzione' and 'Elenco Aziende'.
- Italian Federation of Agents - http://www.fnaarc.it - click on 'agents search'.
- Ipack Ima - http://www.ipack-ima.it - trade fair for processing, packaging and material handling, held every three years in Milan. The next fair will be in 2012.
- SIAB International - http://www.siabweb.com - trade fair for technologies for bakery, pastry, confectionery and pizza processing, held triennially (May) in Verona.
- SIMEI - http://www.simei.it - trade fair for machinery and equipment for oenology and beverage production, bottling and packaging, held biennially (November) in Milan.

Interesting players

Examples of interesting players are:

- FPE - http://www.fpe2000.it - producer of food processing equipment.
- Morello Forni - http://www.morelloforni.com - producer of static and rotary ovens.
- Palermitana Forni - http://www.palermitanaforni.com - producer of ovens.
- Garbin - http://www.garbinovens.com - producer of bakery and food ovens.
- Imaforni - http://www.imaforni.com - bakery equipment.
- Kelvin - http://www.kelvinsrl.com - bakery equipment.
- Moretti Forni - http://www.morettiforni.com - produces pizzeria and bakery ovens.
- Real Forni - http://www.realforni.com - producer of baking equipment.
- Trezza Forni - http://www.trezzaforni.it - ovens and machinery for bakeries, pizzerias and pastry shops.

Italy hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- IT Food Online - http://www.itfoodonline.com - bimonthly magazine for the food industry.
- Italian Chamber of Commerce - http://www.unioncamere.it.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process Worldwide - http://www.process.de - English industrial magazine for all sectors of the industrial process, distributed in Italy six times per year.

CBI
Ministry of Foreign Affairs of the Netherlands

Food processing equipment in the Netherlands

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the food processing equipment market in the Netherlands. The Dutch food processing equipment industry is large and is home to globally renowned food and food processing equipment producers. It ranks as the sixth largest market in the EU. During 2006-2010, imports from DCs remained relatively stable and they accounted for around 7.0% of total food processing equipment imports.

Market characteristics

- The Netherlands is a medium-sized market for food processing equipment in the EU. It is the sixth largest, behind Spain and the UK, but ahead of Denmark and Poland. Apparent demand remained relatively stable at €412 million in the period under review. Refer to Table 1 for more information.

Table 1 Dutch demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
total	**412**	**440**	**412**	**0.0%**
food and drinks	219	212	163	-7.1%
parts thereof	55	86	80	9.7%
meat processing	37	14	49	6.9%
dairy processing	19	25	51	28.3%
fruit and nuts	49	54	31	-10.7%
bakery and confectionery	20	40	18	-3.1%
fermentation and brewery	3	5	3	-5.5%
flour milling	4	2	2	-14.9%
fat and oil	5	1	13	25.6%
agricultural products processing	0	1	3	54.5%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The Netherlands has a large food processing industry. Production of meat and dairy products forms a large share of the industry, while other important segments include the bakery, confectionry, flour and sugar. The majority of processing companies are located in main port cities, namely Rotterdam and Amsterdam. The industry has been characterised by continuous consolidation, also occurring between Dutch and foreign companies. Leading food/beverage processing companies in the Netherlands are Unilever, Heineken and Royal Friesland Foods.

- The Netherlands is a large producer of food processing equipment in the EU. It is the fourth largest, behind Germany and France, but ahead of Spain and Denmark. Production in 2009 amounted to €1.2 billion, after an annual growth of 0.9% between 2005 and 2009. Examples of leading food processing equipment producers include Stork Food Systems (has been merged with Marel from Iceland), Convenience Food Systems (food processing and preparation) and Meyn Food Processing Technology (poultry processing); all of which are internationally renowned.
- Despite a large drop in imports in 2009 (-16%), imports grew by 0.5% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €265 million in 2010. Imports from DCs totalled €18 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 4.1 to 6.9%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 57% of all imports coming from DCs. China was followed by Turkey (18%), India (5.9%), Malaysia (4.7%), Thailand (3.3%), Brazil (2.7%) and South Africa (1.2%). Of the main DC suppliers, Thailand experienced the highest growth (+59% per year), followed by Turkey (34%), India (24%) and China (19%).
- The prices of imports (€17/kg) are higher than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €8.9/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Netherlands's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	**2008**	**2010**	**2006**	**2008**	**2010**	**Total imports**	**DC imports**	
Total	**260**	**320**	**265**	**10.6**	**18.0**	**18.4**	**0.5%**	**14.8%**	**6.9%**
parts thereof	74	95	99	1.2	3.5	5.3	7.4%	45.9%	5.4%
food	34	34	34	2.0	2.7	4.5	-0.3%	22.9%	13.4%
meat processing	37	43	31	1.1	5.7	4.5	-3.9%	41.6%	14.3%
beverages	27	29	21	1.8	0.9	0.8	-5.5%	-17.0%	3.9%
fat and oil	5	2	3	0.9	1.5	0.8	-14.2%	-1.3%	29.6%
dairy processing	44	65	35	1.4	1.7	0.8	-6.0%	-12.9%	2.3%
fruit and nuts	3	3	3	0.1	0.0	0.6	-1.5%	58.9%	22.0%
bakery and confectionery	20	25	27	1.2	0.5	0.4	7.8%	-22.0%	1.6%
other food and drinks	10	14	8	0.8	0.6	0.4	-6.3%	-17.8%	4.8%
fermentation and brewery	2	4	3	0.2	0.1	0.2	5.3%	-2.4%	7.5%
flour milling	2	3	2	0.0	0.4	0.0	-5.3%	-	0.9%
agricultural products processing	1	2	0	0.0	0.4	0.0	-29.4%	-5.3%	2.9%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of food processing equipment), agents and direct sales. Most distributors also function as importers. Additionally, they are less important in relation to complex products than standard products. The best way to approach prospects is by attending food or food processing trade fairs in the Netherlands, or at the leading EU trade fair, namely Anuga

FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennaully (March) in Cologne, Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Dutch Food Processing & Technology - http://www.dutchfoodprocessing.com - association of Dutch small- and medium-sized companies in the food industry, including food processing equipment. Click on 'Participants' for members.
- Dutch Manufacturers of Machinery for Food Processing and Packaging (GMV) - http://www.gmv-fme.nl - click on 'Members'.
- Industrial Processing - http://www.industrialprocessing.nl - process equipment fair, including the food and drink industries, biennially (even years in October) in Utrecht.
- PPT Food - http://www.easyfairs.com - food process equipment fair, annually (November) in Zwolle.

Interesting players

Examples of interesting players are:

- Baas - http://www.baasfood.nl - bakery and food equipment.
- Bakon - http://www.bakon.eu.com - bakery machinery.
- BVT Bakery Services - http://www.bvtbakeryservices.nl - bakery and food equipment.
- Capway Bakery Automation - http://www.capway.nl - industrial bakery machines.
- Daub Baking - http://www.daub-baking.com - bakery machinery.
- Hoba - http://www.hoba.ws - machines for industrial bakery.
- Hogervorst Bakkerijservice - http://www.bakkerijovens.com - produces bakery ovens.
- Kaak Group - http://www.kaakgroep.nl - industrial bakery machinery.
- Rademaker - http://www.rademaker.com - food processing equipment.
- Tromp - http://www.tromp.nl - food processing and bakery equipment.

The Netherlands hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process Worldwide - http://www.process.de - English industrial magazine for all sectors of the industrial process, distributed in the Netherlands six times per year.
- VMT - http://www.vmt.nl - trade magazine for the Dutch food industry, published twenty times per year.

CBI
Ministry of Foreign Affairs of the Netherlands

Food processing equipment in Slovakia

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the food processing equipment market in Slovakia. The market ranks as the twentieth largest in the EU. However, the Slovak food industry is of great importance to the Slovak economy. Being a new EU member, the Slovak food processing sector will need to adapt its processes to EU standards and measures. These changes, together with Slovakia's growing economy, offer interesting market opportunities.

Market characteristics

- Slovakia is a small market for food processing equipment in the EU. It is the twentieth largest, behind Ireland and Bulgaria, but ahead of Lithuania and Latvia. Apparent demand in 2009 totalled €38 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was 7.0%.

Table 1 Slovakian demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**29**	**48**	**38**	**7.0%**
dairy processing	4	10	4	-5.2%
meat processing	3	3	6	20.2%
food and drinks	6	7	5	-4.7%
parts thereof	6	8	4	-8.0%
bakery and confectionery	6	14	10	16.2%
fermentation and brewery	2	2	3	18.6%
agricultural products processing	2	1	1	-17.5%
fruit and nuts	0	0	1	62.9%
fat and oil	0	2	0	-56.6%
flour milling	1	0	4	50.1%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Market opportunities from the Slovak food processing machinery industry arise from improving economic conditions, rising dispoable income levels and higher living standards. There has also been a continuous shift from traditional systems of food processing, such as meat slaughter, to more sophisicated industrial processing.
- Slovakia's food sector accounts for around 15% of the country's total industrial output and is one of the largest industrial sectors in the country. The Slovak food industry, including food processing, has become fully privatised and has attracted a large amount of capital foreign investment. Several international food companies and

breweries have either established production facilities in the country or acquired local producers, including Nestle, Kraft Food, Agrana (Austrian sugar producer), Heineken and SAB Miller. In addition, Poland's E.Wedel (now part of South Korean Lotte Group) has recently announced their plan of opening new plants in Slovakia.

- Dairy production accounts for 15-20% of the total food production, followed closely by meat production, brewing (8.0%), poultry production (8.0%) and confectionery-baking production (7.0%).
- Slovakia is a small producer of food processing equipment in the EU. It is the eighteenth largest, behind Hungary and Latvia, but ahead of Slovenia and Greece. Production in 2009 amounted to €26 million, after an annual growth of 12% between 2005 and 2009.
- Slovakia hosts several domestic and foreign producers of food processing equipment, including Iceland's Marel, which is one of the world's largest producers of advanced food processing equipment. Investment continues as many factories adapt to the standards of the EU, especially directives of hygiene practice and hygiene (food safety) measures.
- Despite a large drop in imports in 2009 (-26%), imports remained virtually stable in the period 2006-2010. Imports amounted to €49 million in 2010. Imports from DCs totalled €0.3 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 0.1 to 0.6%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- Turkey and China were the two DC exporters to Slovakia that experienced the highest growth.
- The prices of imports (€15/kg) are lower than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €15/kg in 2010 (€8.0/kg in the EU).
- In general, the Slovak economy and consumer spending are expected to pick up and be more positive than the previous year. However, sales of food and beverages (especially premium products) might be affected due to current food inflation and increased taxes on alcoholic drinks.

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Slovakia's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			Imports from DCs			CAGR '06-'10		DC share in 2010
	2006	2008	2010	2006	2008	2010	Total imports	DC imports	
Total	**49**	**58**	**49**	**0.1**	**0.4**	**0.3**	**-0.1%**	**47.0%**	**0.6%**
other food and drinks	1	1	2	0.0	0.0	0.1	8.2%	69.1%	6.2%
fruit and nuts	1	1	1	0.0	0.1	0.1	-1.0%	-	12.7%
beverages	2	3	1	0.0	0.0	0.1	-10.4%	241.2%	5.4%
food	3	5	6	0.0	0.0	0.0	14.8%	-	0.5%
meat processing	6	6	5	0.0	0.2	0.0	-4.6%	24.5%	0.5%
parts thereof	5	8	8	0.0	0.0	0.0	11.1%	304.9%	0.1%
bakery and confectionery	15	10	10	0.0	0.1	0.0	-9.7%	-2.6%	0.0%
fermentation and brewery	2	7	4	0.0	0.0	0.0	18.3%	-	0.0%
dairy processing	10	14	6	0.0	0.0	0.0	-11.3%	-	0.0%
agricultural products processing	3	2	1	0.0	0.0	0.0	-29.5%	-	0.0%
fat and oil	0	1	4	0.0	0.0	0.0	82.8%	-	0.0%
flour milling	0	1	2	0.0	0.0	0.0	53.0%	-	0.0%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of food processing equipment), agents and direct sales. Most distributors also function as importers. Additionally, they are less important in relation to complex products than standard products. The best way to approach prospects is by attending food or food processing trade fairs in Slovakia, or at the leading EU trade fair, namely Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennaully (March) in Cologne, Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- ABC Slovenského Hospodárstva - http://firmy.abcsk.sk - company database.
- Agrokomplex - http://www.agrokomplex.sk - trade fair for agriculture, food processing machinery and food packaging, held annually (August or October) in Nitra.
- Milling, Bakery & Confectionary Fair (MBK) - http://www.bvv.cz/mbk - trade fair for processing machinery for bakery and confectionary, held every even year (March) in Brno, the Czech Republic.
- Salima - http://www.bvv.cz/en/salima - trade fair for food processing machinery and food packaging, held (March) in Brno, the Czech Republic.
- Slovak Agricultural and Food Chamber (SPPK) - http://www.sppk.sk - represents associations and organisations in the Slovak agricultural and food industries; click on 'Unions, associations'.
- Slovak Investment and Trade Development Agency - http://www.sario.sk - business partner search.
- Wer Liefert Was - http://sk.wlw.sk - company database.

Find more trade fairs at http://www.eventseye.com and http://www.auma.de.

Interesting players

Examples of interesting players are:

- AXA - http://www.axa-zilina.sk - bakery ovens.
- Farm Profi Modra - http://www.farmprofi.sk - machines for meat processing.
- Lekos - http://www.lekos.sk - machines and equipment for confectionary.
- Milking - http://www.milking.sk/index.php?about - food processing machinery for dairy products, chocolate products and beverages.
- Processing System Solutions - http://www.pss-svidnik.sk - food processing equipment.
- Vops - http://www.vops.sk - wine processing equipment.

Slovakia hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Ministry of Agriculture and Rural Development SR - http://www.mpsr.sk - provides information on Slovakia's agricultural and food (including food processing) industries.
- Process Worldwide - http://www.process.de - English industrial magazine for all sectors of the industrial process, distributed in the Czech Republic six times per year.
- Research Insittute of Agricultural and Food economics (RIAFE) - http://www.vuepp.sk - functions as central (statistical) database of the Ministry of Agriculture.
- Research Institute of Agricultural and Food Economy -
- Slovensko - http://www.slovensko.com - guide to Slovakia, providing general information on doing business in Slovakia.

Food processing equipment in Sweden

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the food processing equipment market in Sweden. The market ranks tenth in the EU. Sweden has a highly advanced food industry and a growing market for functional foods and beverages. During 2006-2010, imports of food processing equipment from DCs recorded a positive growth.

Market characteristics

- Sweden is a medium-sized market for food processing equipment in the EU. It is the tenth largest, behind Poland and Belgium, but ahead of Greece and Romania. Apparent demand in 2009 totalled €136 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -0.6%. Refer to Table 1 for more information.

Table 1 Swedish demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* ‘05-‘09
Total	**140**	**145**	**136**	**-0.6%**
dairy processing	40	36	42	1.4%
food and drinks	39	65	57	9.8%
bakery and confectionery	31	16	14	-17.8%
parts thereof	7	10	10	8.6%
fermentation and brewery	1	4	1	0.3%
meat processing	17	8	8	-16.0%
flour milling	3	4	3	3.6%
fruit and nuts	1	1	1	-2.5%
agricultural products processing	1	1	0	-52.7%
fat and oil	0	0	0	-25.8%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- Food industry is the fourth largest industry in Sweden. Production value reached €18.6 billion (or 170 billion SEK) in 2009.
- The Swedish food processing industry accounts for 80% of the food consumed domestically. In some food market segments, only one or two food suppliers control close to 100% of market share. Farm co-operatives are strong in the Swedish food industry, and are market leaders in the meat, milling and bakery sectors. On the other hand, most food processors in Sweden are privately owned, and are active in the sugar, frozen food, prepared fish and brewing sectors. Leading players include Arla Foods (dairy), Löfbergs Lila (coffee roasting), Findus (fish processing), Swedish Meats (meat processing) and Cerealia (milling and bakery).

- The Swedish industry for functional foods and beverages is one of the most highly developed in the world, with active collaboration among producers, the government and academia, and a high level of research investments. The market value for functional foods and beverages in Sweden was approximately estimated at €172 million in 2009. Innovative products on the market are in the diary, non-dairy and cereals, including probiotics and products derived from oats. The market is dominated by large Nordic and domestic companies, including Arla Foods (dairy products), Brämhults (beverages), Finax (cereals and bakery) and GoGreen (processed foods and non-dairy products).
- Sweden is a small producer of food processing equipment in the EU. It is the eleventh largest, behind Austria and Poland, but ahead of Portugal and the Czech Republic. Production remained relatively stable at €192 million in the period under review.
- Despite a large drop in imports in 2009 (-24%), imports declined by only 1.6% in the period 2006-2010 (this was a higher decline than average development in the EU). Imports amounted to €147 million in 2010. Imports from DCs totalled €4.7 million in 2010. Contrary to total imports, the development of DC imports was positive in the period under review, which led to an increase in their share (from 2.3 to 3.2%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 86% of all imports coming from DCs. China was followed by Lebanon (4.4%), Turkey (2.8%) and Brazil (1.5%). Of the main DC suppliers, only China experienced growth (+21% per year).
- The prices of imports (€26/kg) are relatively high compared to the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €11/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices, please refer to the modules concerning the pipes and process equipment market in general.

Table 2 Sweden's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			**Imports from DCs**			**CAGR '06-'10**		**DC share in 2010**
	2006	**2008**	**2010**	**2006**	**2008**	**2010**	**Total imports**	**DC imports**	
Total	**157**	**164**	**147**	**3.7**	**3.3**	**4.7**	**-1.6%**	**6.5%**	**3.2%**
beverages	21	16	22	0.0	0.2	2.7	1.0%	198.3%	12.4%
dairy processing	40	39	34	1.7	1.7	0.7	-3.6%	-20.4%	1.9%
parts thereof	24	25	25	0.2	0.3	0.4	0.8%	25.2%	1.6%
bakery and confectionery	16	17	11	0.2	0.2	0.3	-8.7%	3.5%	2.4%
food	25	26	23	0.4	0.2	0.2	-2.2%	-11.0%	1.0%
other food and drinks	9	11	10	0.5	0.5	0.2	2.3%	-20.7%	2.1%
meat processing	13	15	15	0.0	0.2	0.1	4.1%	31.9%	0.7%
fruit and nuts	1	1	1	0.0	0.0	0.1	-3.2%	63.0%	5.8%
flour milling	4	4	2	0.6	0.0	0.1	-13.5%	-45.1%	2.5%
fermentation and brewery	3	8	1	0.0	0.0	0.0	-28.2%	72.4%	3.6%
agricultural products processing	0	1	2	0.0	0.0	0.0	85.7%	-	0.4%
fat and oil	1	0	1	0.0	0.0	0.0	-13.8%	5.5%	0.5%

Source: Eurostat (2011)

Trade channels and finding trading partners

The producer (subcontractor) of food processing equipment is the most important trade channel for the DC exporter. Agents and distributors play a minor role. The best way to approach prospects is by attending food or food processing trade fairs in Sweden or at the leading EU trade fair, namely Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennaully (March) in Cologne, Germany. Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Association of Swedish Engineering Industries - http://www.teknikforetagen.se/en/Membership/Sok-medlemmar - search with keyword, such as 'Food', for members.
- Dan Fish International - http://www.danfish.com - trade fair for the fishing industry, including fish processing equipment and machinery, held every odd year (October) in Aalborg, Denmark.
- Swedish Agents Directory - http://www.agenturforetagen.se - database of Swedish agents. Click on 'Find company' and search by product name.
- Swedish Bakery and Pastry Show - http://www.kistamassan.com - important bakery and confectionary trade fair in Sweden, held triennially (September) in Stockholm.
- Swedish Food Federation (Li) - http://www.li.se - trade and employers' federation for the Swedish food industry. Industry information and a list of member associations can be found on the website.

Interesting players

Examples of interesting players are:

- Dalblad's Chocolate Machines - http://chocolate.dalblads.se - chocolate machinery.
- Glimek - http://www.glimek.se - bakery machinery.
- Pow Tech - http://www.powtech.se - bakery and food processing equipment.
- Revent - http://www.revent.com – producer of ovens.
- Roulette - http://www.svroulette.se - industry bakery machines.
- Sveba-Dahlen - http://www.sveba-dahlen.com - produces various kinds of ovens.

Sweden hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process Worldwide - http://www.process.de - English industrial magazine for all sectors of the industrial process, distributed in Sweden six times per year.

CBI
Ministry of Foreign Affairs of the Netherlands

Food processing equipment in the UK

This CBI fact sheet aims to introduce food processing equipment suppliers from developing countries (DCs) to the food processing equipment market in the UK. It ranks as the fifth largest market in the EU. Despite the currently small share of imports from DCs in total imports, DC imports of food processing equipment recorded a positive growth during 2006-2010.

Market characteristics

- The UK is a large market for food processing equipment in the EU. It is the fifth largest, behind Germany and Spain, but ahead of the Netherlands and Denmark. Apparent demand in 2009 totalled €581 million. Compound annual average growth (CAGR) in the period under review (2005-2009) was -6.6%. Refer to Table 1 for more information.

Table 1 UK demand for food processing equipment, by type, 2005-2009, € million

	2005	2007	2009	CAGR* '05-'09
Total	**763**	**848**	**581**	**-6.6%**
food and drinks	424	497	325	-6.4%
parts thereof	110	107	88	-5.4%
bakery and confectionery	123	132	54	-18.5%
meat processing	37	53	37	-0.2%
dairy processing	45	25	52	3.7%
fermentation and brewery	10	9	6	-12.6%
agricultural products processing	3	4	8	27.8%
fat and oil	3	6	2	-8.3%
flour milling	3	3	4	8.2%
fruit and nuts	5	12	5	1.5%

Source: Eurostat Prodcom (2011)
*Compound annual growth rate

- The UK's food processing machinery market is highly competitive and characterised by rapid technological advancements and tightening of environmental and hygiene regulations. Several producers, especially in the meat and dairy product segments, are addressing new changes and emerging opportunities.
- Similar to other developed food markets, the UK food processing industry shows increasing interests in energy efficient processes. Low CO_2 emission technology/equipment is expected to grow as an alternative to conventional energy-intensive processes. For example, in the dairy and bakery sector, this especially applies to ovens, which account for around 35-45% of bakery plant emission. The UK hosts more than 100 production facilities of dairy products and the country's dairy processing industry processes more than 13 billion litres of milk yearly.

- The UK is a medium-sized producer of food processing equipment in the EU. It is the seventh largest, behind Spain and Denmark, but ahead of Belgium and Austria. Production in 2009 amounted to €450 million, after an annual decline of 7.0% between 2005 and 2009. An example of important producers is AEW Delfort Systems, which joined with Iceland's Marel in 2009.
- The UK is one of the world's leading importers of food processing machinery. Despite a large drop in imports in 2009 (-19%), imports grew by 2.5% in the period 2006-2010, which was contrary to average development in the EU. Imports amounted to €543 million in 2010. Imports from DCs totalled €25 million in 2010. They grew faster than total imports in the period under review, which led to an increase in their share (from 2.4 to 4.5%). Table 2 shows the size, growth and share of food processing equipment imports from DCs per type.
- China accounted for 71% of all imports coming from DCs. China was followed by Mexico (11%), India (4.9%), Turkey (4.5%), South Africa (2.8%) and Thailand (2.3%). Of the main DC suppliers, Thailand experienced the highest growth (+32% per year), followed by China (30%), Turkey (25%) and Mexico (18%).
- The prices of imports (€12/kg) are lower than the average import price in the EU (€16.5/kg in 2010). The average price of imports from DCs (excl. China) was €13/kg in 2010 (€8.0/kg in the EU).

For more information on buyer requirements, trends, trade structure and prices please refer to the modules concerning the pipes and process equipment market in general.

Table 2 UK's imports: size, growth and share of food processing equipment from DCs, by type, 2006-2010

	Total imports			**Imports from DCs**			**CAGR '06-'10**		**DC share in 2010**
	2006	**2008**	**2010**	**2006**	**2008**	**2010**	**Total imports**	**DC imports**	
Total	**491**	**504**	**543**	**11.5**	**20.9**	**24.6**	**2.5%**	**20.8%**	**4.5%**
bakery and confectionery	65	72	76	3.5	4.4	8.4	4.0%	25.1%	11.0%
food	101	100	106	3.0	5.8	5.2	1.2%	14.7%	4.9%
other food and drinks	41	32	35	1.7	2.9	4.1	-3.5%	23.6%	11.5%
dairy processing	43	51	45	1.3	2.3	2.2	1.6%	14.8%	4.8%
parts thereof	115	112	133	0.9	0.9	1.6	3.7%	15.8%	1.2%
beverages	54	50	50	0.3	1.4	1.2	-1.7%	47.6%	2.5%
meat processing	47	42	57	0.4	0.7	0.6	5.1%	11.5%	1.1%
flour milling	3	4	13	0.1	0.1	0.6	49.9%	48.0%	4.6%
fermentation and brewery	7	18	7	0.2	2.1	0.3	-2.1%	21.4%	5.1%
fruit and nuts	8	8	8	0.1	0.2	0.2	2.7%	32.3%	2.4%
fat and oil	6	7	5	0.2	0.3	0.1	-5.0%	-23.5%	1.4%
agricultural products processing	3	8	6	0.0	0.0	0.0	22.1%	103%	0.4%

Source: Eurostat (2011)

Trade channels and finding trading partners

The most common trade channels are distributors, subcontractors (producers of food processing equipment), agents and direct sales. Most distributors also function as importers. Additionally, they are less important in relation to complex products than standard products. The best way to approach prospects is by attending food or food processing trade fairs in the UK, or at the leading EU trade fair, namely Anuga FoodTec (http://www.anugafoodtec.com; food and beverage technology exhibition, held triennially (March), in Cologne, Germany). Besides meeting prospects at trade fairs, the Internet is a highly valuable source to find potential trading partners. Relevant country-specific sources to find prospects are:

- Applegate directory - http://www.applegate.co.uk - search by 'Products & Services'.
- Campden BRI http://www.campden.co.uk - the UK's largest independent membership-based organisation for the technology in the food and drink supply chain. Click on 'Members List' to see members.
- Food & Drink Expo - http://www.foodanddrinkexpo.co.uk - trade fair for the food and beverage industry, including manufacturing, held every even year (March), in Birmingham.
- Hotfrog - http://www.hotfroguk.co.uk - company database.
- PPMA Show - http://www.ppmashow.co.uk - processing and packaging machinery exhibition, held every odd year (September), in Birmingham. Also attended by food processing equipment producers.
- Process & Packing Machinery Association - http://www.ppma.co.uk - represents suppliers of processing and packaging machinery in the UK; click on 'PPMA Members' to view a list of members.
- Process and Control today - http://www.pandct.com - search by 'supplier', 'product' or 'product area'.
- Total - http://www.totalexhibition.com - processing and packaging exhibition, held triennially (May) in Birmingham.
- Total Processing & Packaging - http://www.totalexhibition.com - process engineering equipment fair, triennially (May) in Birmingham. The next event will be held in 2013.

Interesting players

Examples of interesting players are:

- Alpma - http://www.alpma.co.uk - cheese making equipment.
- BCH - http://www.bchltd.com - food and confectionery machinery.
- Grote - http://www.grotecompany.com - producer of machines for sandwich production; headquartered in the U.S., with a factory in the UK.
- Holmach - http://www.holmach.co.uk - thermal processing technology for the food industry.
- Raque - http://www.raque.com - produces industrial food machinery.
- Riggs Autopack - http://www.autopack.co.uk - produces depositing and filling machines for food production.
- Spooner - http://www.spooner.co.uk - producer of machinery for the food processing industry, including ovens, dryers, process controls.
- Winkworth Machinery - http://www.mixer.co.uk - producer of mixers for bakery and food processing.

The UK hosts several interesting players. Since each company is unique, with its own customers, market segments and products, the profile of the potential trading partner is very important. There is a considerable chance that you will find one that matches.

Other useful sources

- Food and Drink International - http://www.fdiforum.net - monthly magazine for the food and drink industry.
- Food Manufacture - http://www.foodmanufacture.co.uk - magazine for professionals in the food, beverage and bakery industry.
- Food Processing magazine - http://www.fponthenet.net - monthly food manufacturing magazine.
- Kwintessential - http://www.kwintessential.co.uk/resources/country-profiles.html - for practical tips on business culture and etiquette.
- Process Engineering - http://www.centaur.co.uk - monthly engineering magazine.
- Process Worldwide - http://www.process.de - industrial magazine for all sectors of the industrial process, issued six times per year.

- Meat Management - http://www.yandellmedia.com/yandell_meat_frameset.html - trade magazine, issued six times a year.