

KWD Market + Charts

Heating & Plumbing Pipes Europe 08/2025

Consumption of pipes by material and country

Contents:

- Introduction / Housing Completions Statistics
- Consumption of Heating & Plumbing Pipes 2023 – 2027
- European Overview of Heating & Plumbing Pipes
- Company Profiles of European Pipe Manufacturers
- Pipes in “Tons” - Long Term Charts 2023 – 2027

Includes the following Excel spreadsheets:

- Heating & Plumbing Pipe Consumption 2023 – 2027 (tables and graphs)
- Pipe consumption 2023 - 2027 as a pivot table
- Crisis Calculator (for individual adjustment of the estimation 2026/27)

Price Information:

19 Countries, 266 pages, in English language. Contains: digital version as pdf file, Excel files: Pipe Consumption / Crisis Calculator

1.200,- € for subscribers of KWD-SHK or KWD-globalpipe, 1.450,- € for all others

Authors:

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KWD Market + Charts "Heating & Plumbing Pipes Europe - Update 08/2025"

As always, we have estimated the current and future pipe consumption in the Euroconstruct area for this KWD Market Report on the basis of statistical values and forecasts for completions and modernisations in residential and non-residential construction. The data from the Euroconstruct Summer Conference 2025 served as the basis for this.

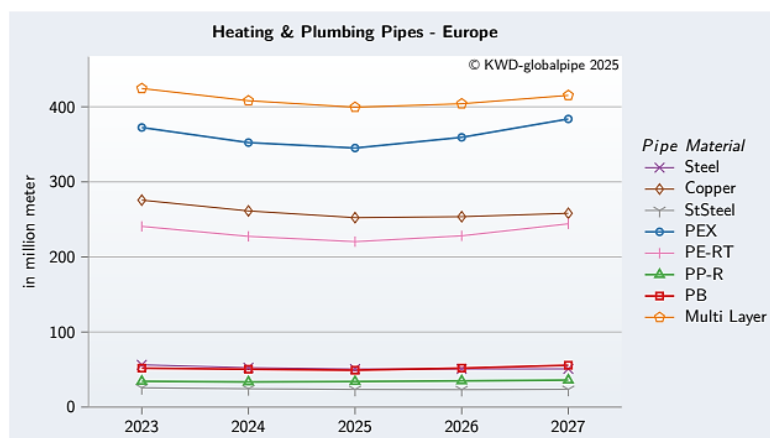
The KWD Market + Charts report "Heating & Plumbing Pipes Europe 2025" estimates the pipe consumption in millions of meters used in domestic installations in the 19 Euroconstruct countries for the years 2023 – 2027. As always, the estimated pipe quantities are broken down by application areas and pipe materials.

We divide the sector of Heating & Plumbing Installations into the three areas:

- surface heating & cooling
- radiator connection
- sanitary installations

The following pipe materials are analyzed by applications:

- Metal pipes: steel, copper and stainless steel
- Plastic pipes: PEX, PE-RT, PP-R and PB
- Multilayer composite pipes: PEX or PE-RT with a middle layer of Aluminium



The volume estimates are based on the new construction and modernisation figures for residential and non-residential construction published twice a year by the Euroconstruct network, each with a three-year trend. The KWD Market + Charts report is based on the figures from the Euroconstruct study published in June 2025. According to Euroconstruct, the ongoing decline in residential construction will not allow for any significant growth in construction activity in 2025. Increases are expected again from 2026. The study concludes that demographic trends and rising household incomes will provide somewhat stronger impetus for European residential construction in all countries.

It should be noted that this statement refers to all 19 countries as a whole, but there are still differences when looking at the individual countries. While declines of 14 - 20 % are expected in the new construction sector in 2025 for Norway, Austria, Germany, Denmark, Finland and France, Sweden expects an increase of 21.3 %, Spain of 12.4 % and Ireland of 9.1 %. This development is discussed in detail in Chapter 2 of the study.

Development of pipe materials by area of application in Europe:

- Even though PEX pipes are still the leading choice for surface heating throughout Europe, PE-RT has caught up significantly in recent years. Compared to all other pipe types, however, PEX and PE-RT are the leading choices when it comes to materials for surface heating pipes.
- In radiator connections, copper and multilayer pipes are also still in a neck-and-neck race, with multilayer pipes having a slight lead but not being able to extend it.
- In sanitary installations, multilayer has been far ahead for many years, followed at a considerable distance by copper.

3.15 Portugal (tables and charts)

Floor Heating / Surface Heating & Cooling - Portugal

Year	Metal-Pipes			Plastic-Pipes				Multi layer	Totals		Total
	Steel	Copper	StSteel	PEX	PE-RT	PP-R	PB		Metal	Plastics	

2023 0.00 0.00 0.00 1.34 0.67 0.00 0.00 0.04 0.00 2.01 2.05

Sanitary / Hot & Cold Water Systems - Portugal

Year	Metal-Pipes			Plastic-Pipes				Multi layer	Totals		Total
	Steel	Copper	StSteel	PEX	PE-RT	PP-R	PB		Metal	Plastics	

2023 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2024 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2025 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2026 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2027 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2028 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2029 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2030 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2031 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2032 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

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2034 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2035 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

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2062 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2063 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2064 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2065 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2066 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2067 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2068 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2069 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

2070 0.00 2.60 0.38 1.47 0.04 1.05 0.12 1.08 2.07 2.50 2.54

Estimation of the consumption of Heating & Plumbing Pipes in Europe

The report covers the EC19 countries (as defined by EUROCONSTRUCT):

Austria
Belgium
Czech Republic
Denmark
Finland
France
Germany
Great Britain
Hungary
Ireland
Italy
Netherlands
Norway
Poland
Portugal
Slovakia
Spain
Sweden
Switzerland

Europe / Western Europe / Eastern Europe

A range of 5 years is always shown per country:

- 2 years backward
- Current year
- 2 years forward

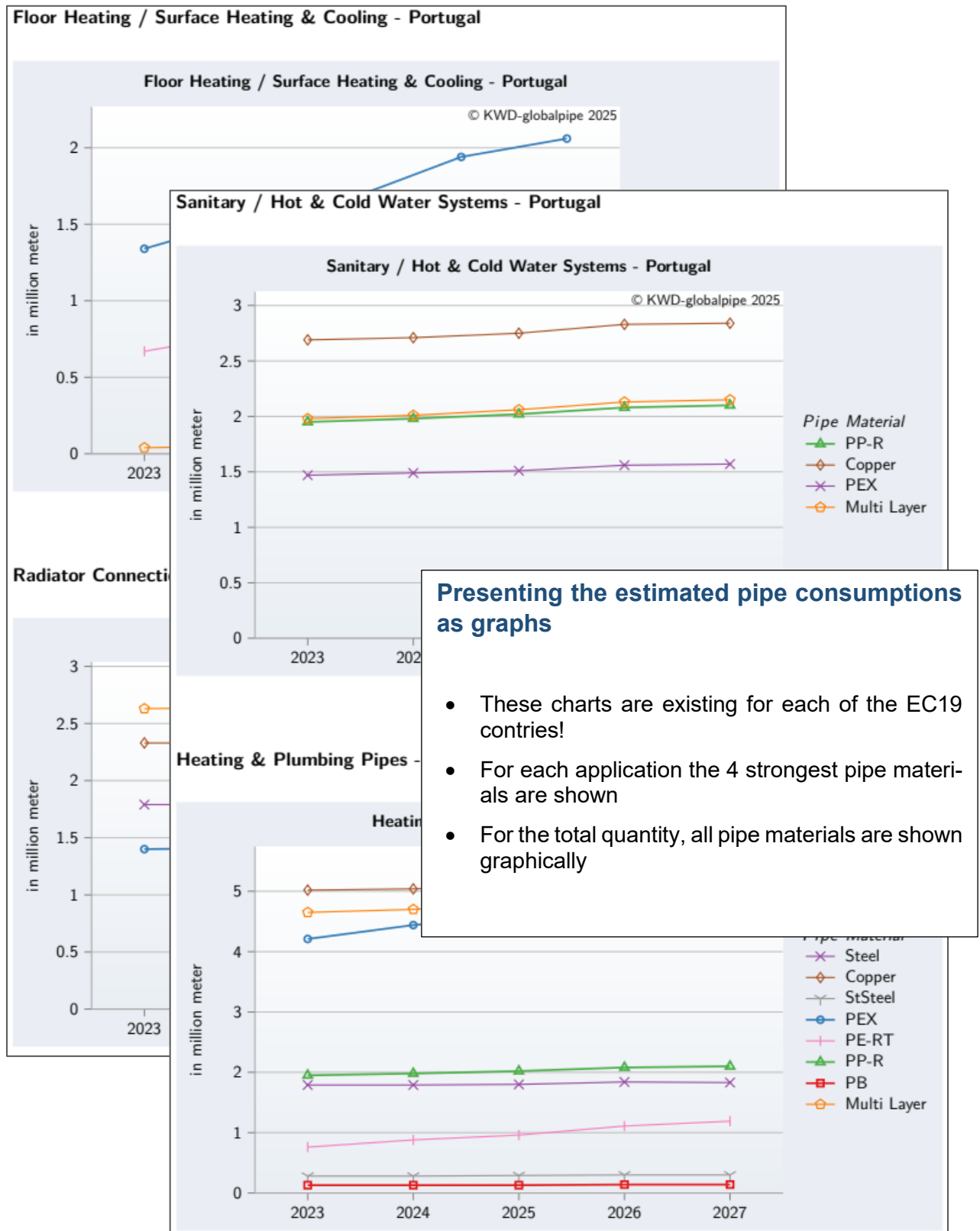
Shown is the pipe consumption for the applications:

- Floor Heating / Surface Heating & Cooling
- Radiator Connection
- Sanitary Installations (Hot & Cold Water Systems)

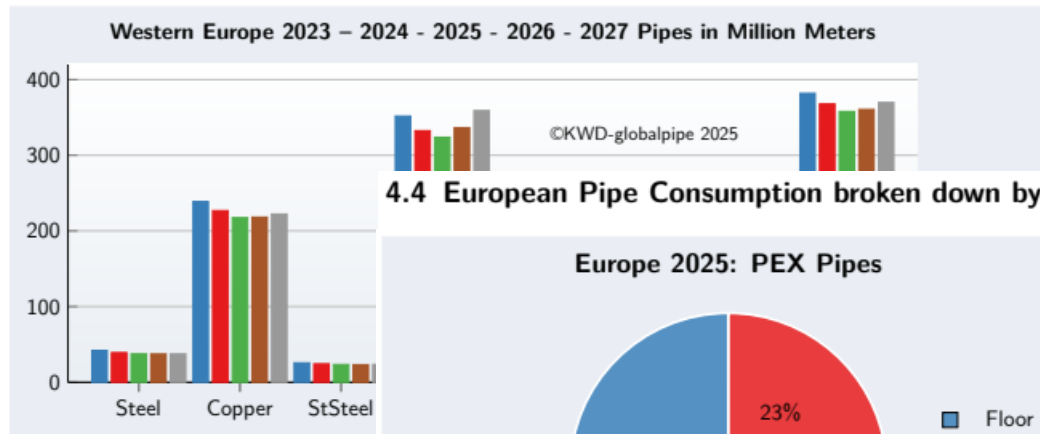
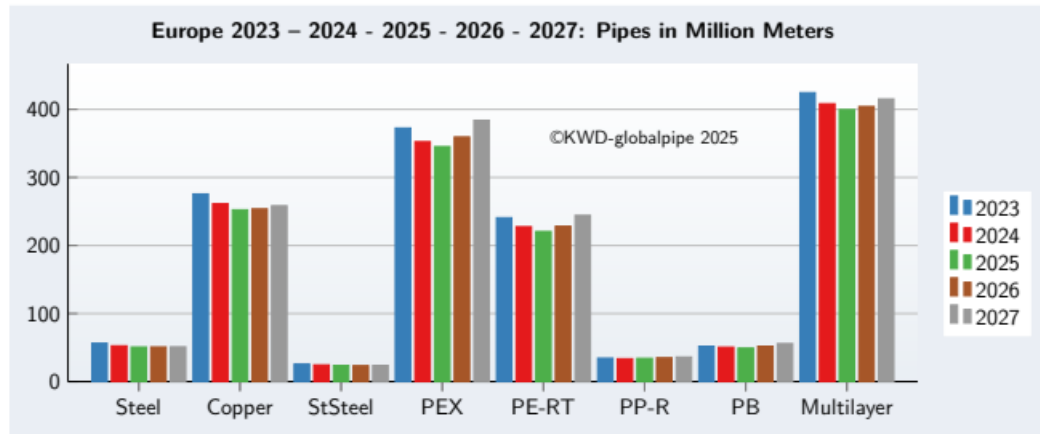
The analysis includes the following contents:

- estimated pipe consumption per application and as a total
- % change on previous years
- % market share

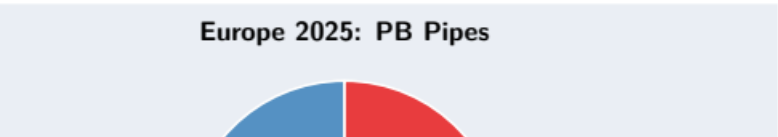
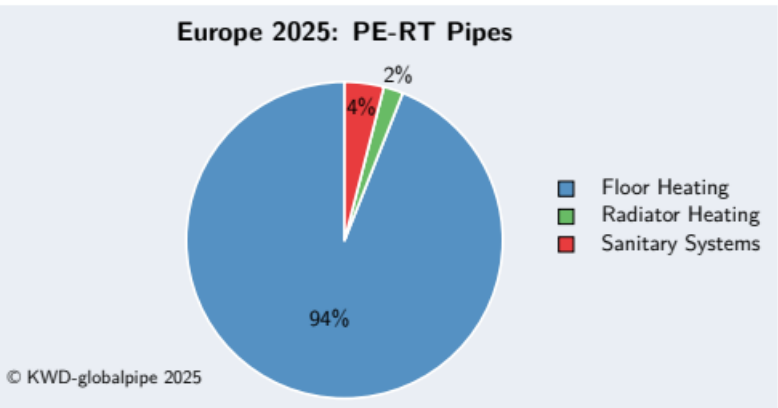
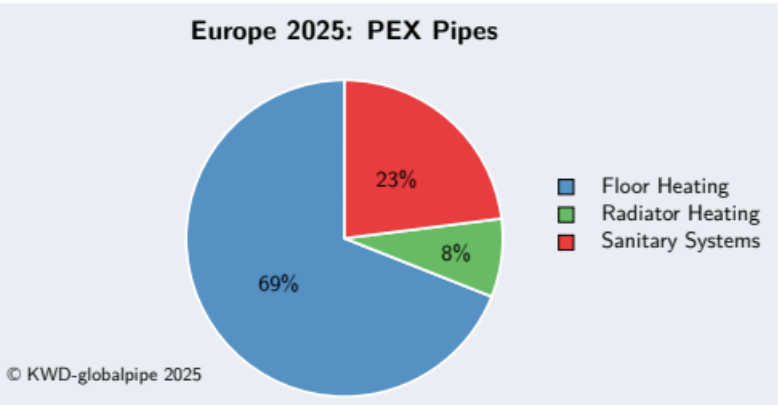
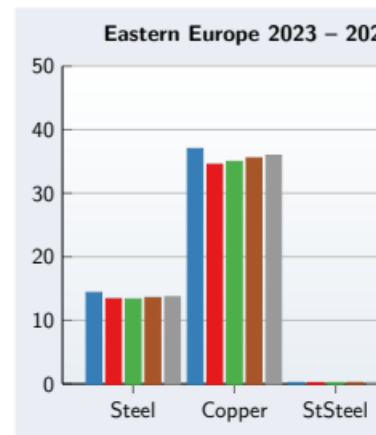




4.5 Development of Pipe Consumption in Europe 2023 – 2027



4.4 European Pipe Consumption broken down by applications 2025



7 KWD Crisis Calculator

The KWD Crisis Calculator is our response to the unclear assessment of construction work due to the various crises of recent years and the resulting difficulties.

The crisis calculator is an Excel table that initially contains the same tables as in the study with the pipe consumption. These tables can be found again in parallel, but the years 2026 and 2027 can be edited.

A correction factor can be specified for each country as a percentage with which 2026 is recalculated. 2027 is then recalculated based on the corrected figures for 2026.

The graphs are then displayed with the recalculated values for 2026 and 2027.

Instructions on how to use the crisis calculator can be found on the first sheet in the Excel file.

KWD Market + Charts Heating & Plumbing Pipes Europe 2025		
Crisis Calculator	Crisis-related change in percent for the years 2026-2027	
Austria	0,0%	Here you can enter a percentage with one decimal place. The changes are taken into account for the years 2026 and 2027. Inputs can be negative or positive, so for example: "-1,5" or "1,5".
Belgium	0,0%	
Switzerland	0,0%	
Czech Republic	0,0%	
Germany	0,0%	
Denmark	0,0%	
Spain	0,0%	
Finland	0,0%	
France	0,0%	
Great Britain	0,0%	
Hungary	0,0%	
Ireland	0,0%	

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