

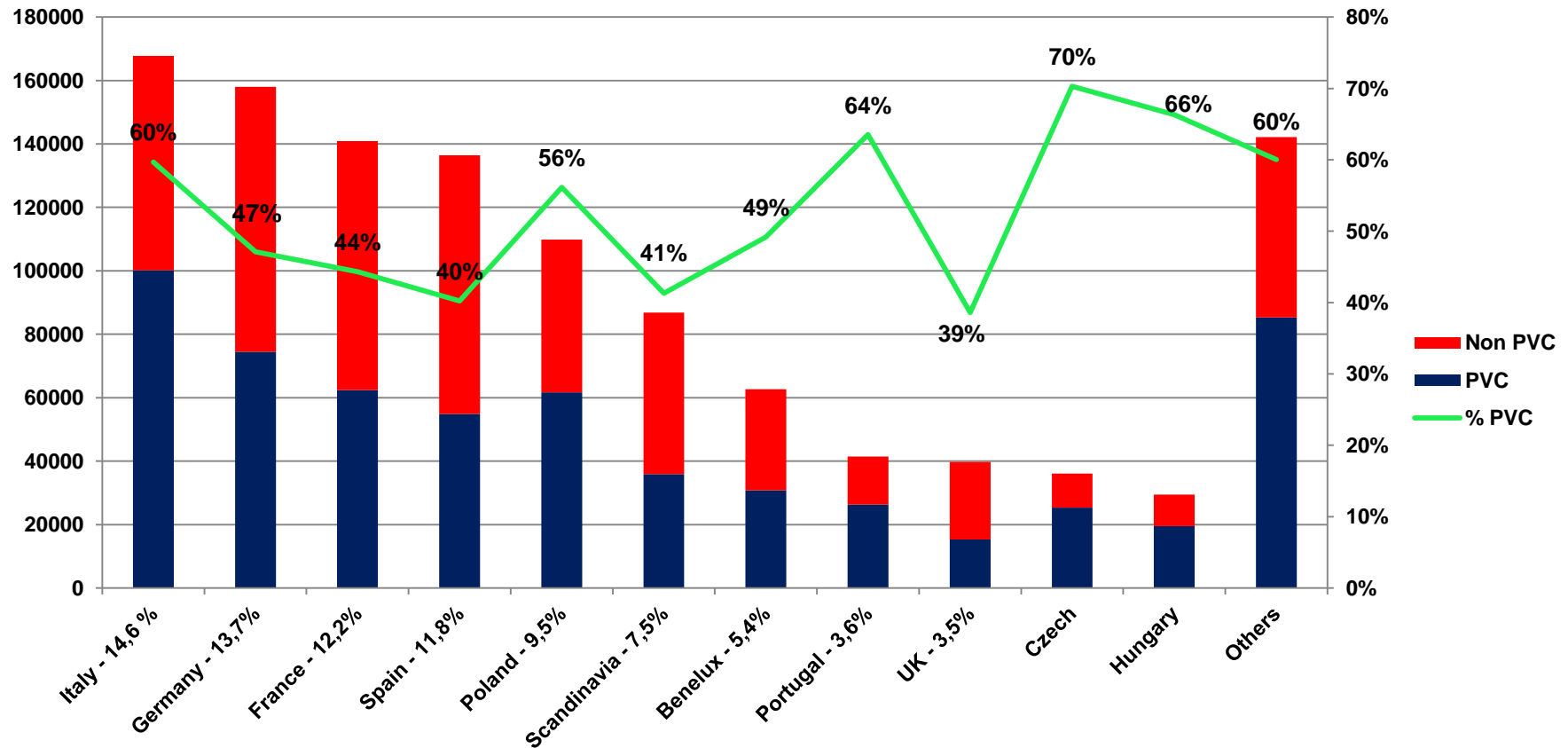


# **PVC cables 2016**

## **Market overview**

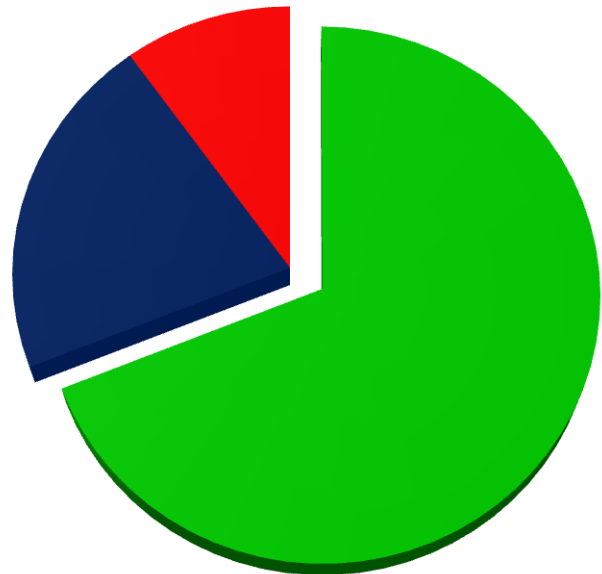
# PVC Cables in Europe

## Demand by Regions

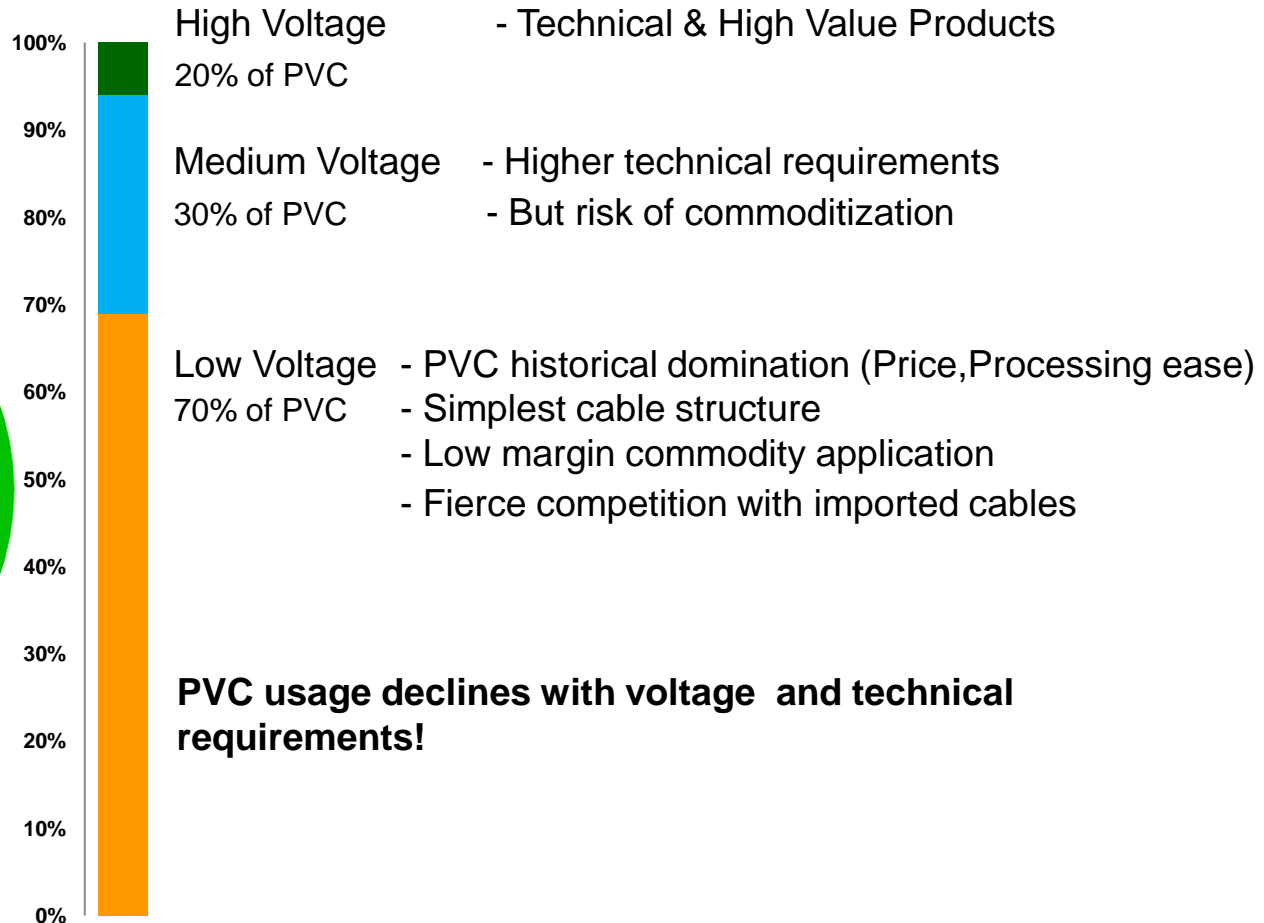


# PVC Cables in Europe

## Applications Overview



■ Power Cables  
■ Telecom  
■ Others



# PVC Cables in Europe

## Views & Summary

- ▶ A mature market - Industry consolidation
  - Commodity products with low technical requirements
  - Fierce competition with imported goods
  - Lack of technical innovation & developments
- ▶ Bi-polar market in Europe
  - General purpose PVC/PE cables : No innovation, low margin, price competition
  - Innovative cables ( Telecom, light weight, submarines, high voltage...). PVC not well positioned here.
  - .... but still clear regional differences !
- ▶ The PE industry is very active. Low Smoke Halogen Free (LSHF) cables are promoted and challenge PVC cables
- ▶ Weak market conditions and economic environment ( Lack of public investment in new infrastructure, weak building market...) seen as impacting PVC cables into much greater extent.
- ▶ Changing regulations eg. circular economy or CPR

Although having a well established cost/performance track of record for cables, PVC has been losing market share in the cable market. How to reverse the trend ?