KWD globalpipe

Information on the report and pages samples

KWD Market Report

Fittings and Pipe Connections Europe 2025
for Heating & Plumbing Systems

- Consumption of Fittings 2023 – 2027
- Basic Designs of Pipe Connections
- Analysis of used Fittings by Connection Type

Update 11/2025
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Contents of the KWD Fitting Report Europe, / Update 11/2025

Chapter 3 The Development of Fittings - a brief look back

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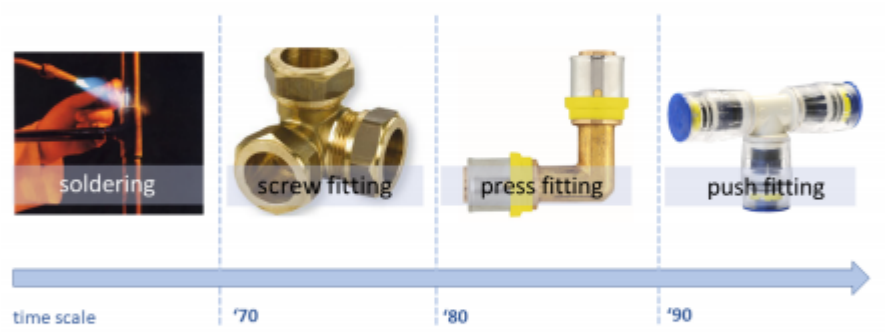
For many years, the world of fittings and connection technology was overseeable. For heating and sanitary installations almost exclusively steel and copper pipes were used and these pipes were connected by mainly manual welding or soldering. For directional changes in the pipe system, threaded fittings were used for steel pipes and soldering fittings were used for copper pipes.

With the introduction of alternative pipe materials to the market beginning in the 1960s, new jointing techniques adapted to the specific properties of these pipes were often required. For example, in supply piping systems, the increasingly used plastic pipes, such as PVC or PE were plugged or even welded. For special applications that required detachable connections, clamp connectors made of metal were already available.



The modern time in pipe jointing technology began in the 70s and 80s with the increasing use of plastic pipes in hot water applications.

Pipe installations for heating or drinking water place high demands on the permanent tightness of the pipe connection, even in areas that are difficult to access, such as concrete or flush-mounted installations.

The increasing market penetration of pipes made of cross-linked polyethylene (PE-X) - a thermoelastic resin, at that time not reliably weldable - favoured the popularity of mechanical pipe joints.

Pipe joints, specially adapted to the dimensions and properties of these newly developed pipes, became more and more an integral part of this new generation of complete pipe systems, e.g. for underfloor heating. In addition, the often excellent flexibility of the new pipe materials allowed the pipe to be bent or bends to be formed without tools or fittings.

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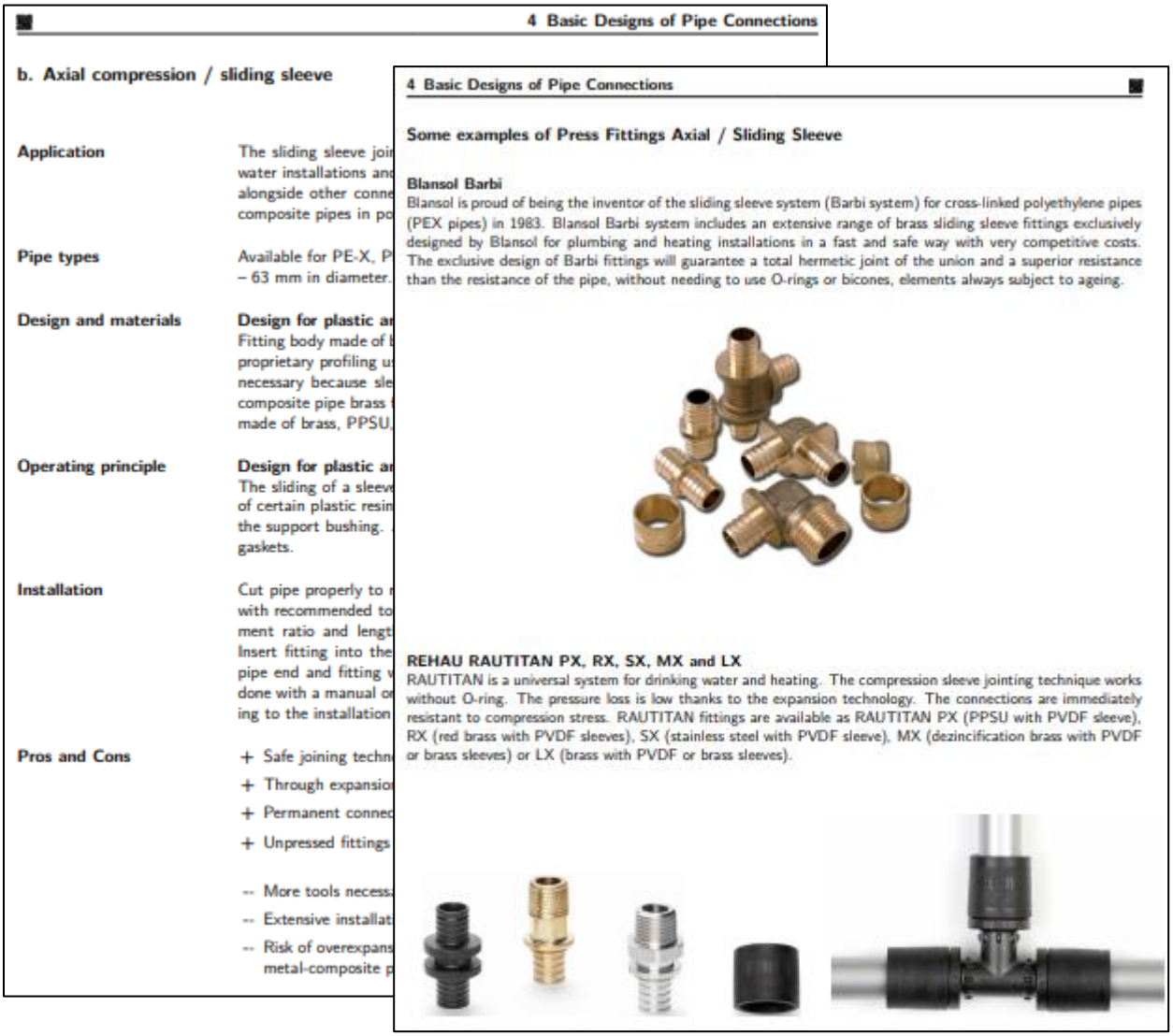
Further subchapters to chapter 3:

Chapter 4 Basic designs of pipe connections

This chapter describes the different connection types on basis of the following points: application, pipe types, designs and materials, operating principle, installation, pros and cons. Next to the explanation of the fitting type, various examples of fittings are shown.

The chapter is divided into the following points



4 Basic Designs of Pipe Connections

b. Axial compression / sliding sleeve

Application The sliding sleeve joi
water installations an
alongside other conne
composite pipes in po

Pipe types Available for PE-X, P
– 63 mm in diameter.

Design and materials **Design for plastic a**
Fitting body made of
proprietary profiling u
necessary because sle
composite pipe brass
made of brass, PPSU.

Operating principle **Design for plastic a**
The sliding of a sleev
of certain plastic resin
the support bushing.
gaskets.

Installation Cut pipe properly to
with recommended to
ment ratio and lengt
Insert fitting into the
pipe end and fitting
done with a manual o
ing to the installation

Pros and Cons
+ Safe joining techn
+ Through expansio
+ Permanent connec
+ Unpressed fittings
– More tools necess
– Extensive installat
– Risk of overexpans
metal-composite p

4 Basic Designs of Pipe Connections

Some examples of Press Fittings Axial / Sliding Sleeve

Blansol Barbi
Blansol is proud of being the inventor of the sliding sleeve system (Barbi system) for cross-linked polyethylene pipes (PEX pipes) in 1983. Blansol Barbi system includes an extensive range of brass sliding sleeve fittings exclusively designed by Blansol for plumbing and heating installations in a fast and safe way with very competitive costs. The exclusive design of Barbi fittings will guarantee a total hermetic joint of the union and a superior resistance than the resistance of the pipe, without needing to use O-rings or bicones, elements always subject to ageing.

REHAU RAUTITAN PX, RX, SX, MX and LX
RAUTITAN is a universal system for drinking water and heating. The compression sleeve jointing technique works without O-ring. The pressure loss is low thanks to the expansion technology. The connections are immediately resistant to compression stress. RAUTITAN fittings are available as RAUTITAN PX (PPSU with PVDF sleeve), RX (red brass with PVDF sleeves), SX (stainless steel with PVDF sleeve), MX (dezincification brass with PVDF or brass sleeves) or LX (brass with PVDF or brass sleeves).

Chapter 5 Analysis of used Fittings by Connection Type

5.1 Comments on the Fitting Markets

This chapter explains the development of the fitting market and the individual types of fittings.

5.2 Structure of the market survey

The data for analysis of the types of fittings were collected and analyzed as a percentage in a survey, carried in autumn 2025. The quantity of fittings by connection type has been calculated based on the collected percentage and the consumption of fitting (see chapter 6).

In an anonymous survey, we asked the following questions:

- Which country do you come from?
- In your opinion, which 3 types of fitting are most used in your country?
- How high do you estimate the percentage of metal or plastic fittings in your country?

The analysis of the survey results is available for:

- Austria
- Belgium and Netherlands
- Germany
- Great Britain
- Italy
- Poland
- Spain

However, we would like to point out once again that this was an anonymous survey and that the projections presented are merely an evaluation of the responses received. There is no guarantee that these results correspond to reality.

Please note the following information regarding the evaluation of the survey:

- The data for analysis of the types of fittings were collected and analyzed as a percentage in an anonymous survey.
- We only give whole numbers in the evaluation. For this purpose, the calculated results were rounded up or down.
- The quantity of fittings by connection type has been calculated based on the collected percentage and the consumption of fitting.
- The analysis refers to all fittings used in heating & plumbing applications for all pipe materials.
- Fitting types whose quantity was less than 3% in the survey evaluation were not taken into account.

The Analysis by connection type and by material (metal or plastic) is available for:

Austria, Belgium and Netherlands, Germany, Great Britain, Italy, Spain and Poland.
The data requested was for the year 2025.

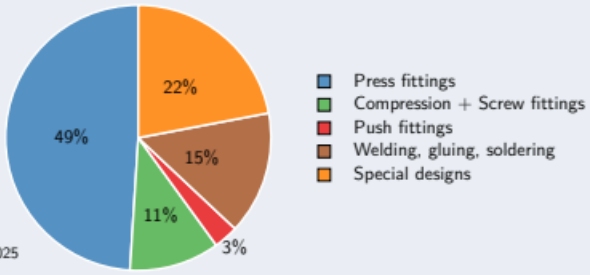
The quantity of fittings by connection type has been calculated based on the collected percentage and the consumption of fitting (see chapter 6).

At this point, we would like to show the evaluation for Spain as an example. The principle of the evaluation is the same for all countries listed.

5 Analysis of used Fittings by Connection Type and Material

5.2.7 Spain

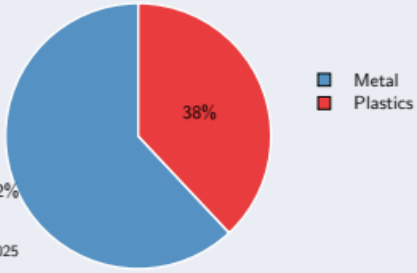
Spain 2025: Fittings by connection type



Fittings for heating & plumbing applications for all pipe materials	Fittings by connection type 2025 in percent share in %	in Million pieces million pieces
Press fittings	49%	31,06
Compression+Screw fittings	11%	6,97
Push fittings	3%	1,90
Welding, gluing, soldering	15%	9,51
Special designs	22%	13,94
	100%	63,38

Note: Fitting types whose quantity was less than 3% in the survey evaluation were not taken into account.

Spain 2025: Fittings by material



Chapter 6 Consumption of Fittings by Pipe Material Europe 2023 - 2027

This chapter is the heart of the study. It shows the consumption volumes of fittings in million pieces by pipe material on 4 pages per country:

- Floor heating (surface heating)
- Radiator connection
- Sanitary installation
- Total (Heating & Plumbing Pipes)

6.3 Consumption of Fittings in Europe 2023 - 2027

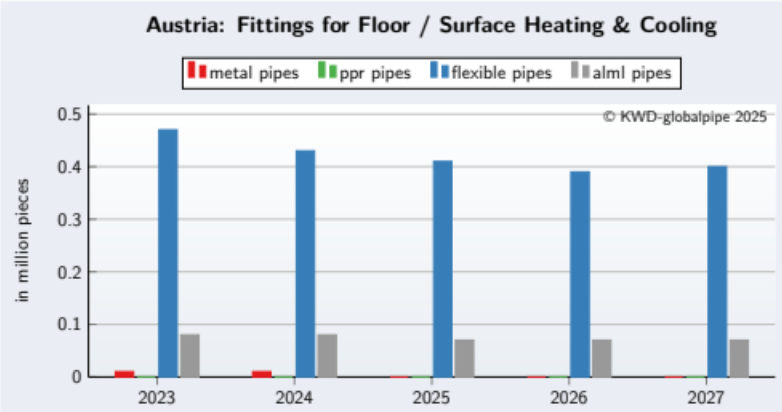
6.3.1 Consumption of Fittings - Austria

Floor Heating / Surface Heating & Cooling - Austria

Fittings for	2023	2024	+/- Previous Year	2025	+/- Previous Year	2026	+/- Previous Year	2027	+/- Previous Year
metal pipes[1]	0.01	0.01	0.00 %	0	-100.00 %	0	– %	0	– %
PP-R pipes	0	0	– %	0	– %	0	– %	0	– %
flexible pipes[2]	0.47	0.43	-8.51 %	0.41	-4.65 %	0.39	-4.88 %	0.4	2.56 %
Alu-Multilayer pipes[3]	0.08	0.08	0.00 %	0.07	-12.50 %	0.07	0.00 %	0.07	0.00 %
Total	**0.56**	**0.52**	**-7.14 %**	**0.48**	**-7.69 %**	**0.46**	**-4.17 %**	**0.47**	**2.17 %**

Fittings in million pieces
[1] Carbon steel/steel, copper + stainless steel
[2] PEX, PE-RT + PB pipes
[3] PEX or PE-RT/Al/...

Floor Heating / Surface Heating & Cooling - Austria



Available for 19 European countries:

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

Radiator Connection - Austria

Fittings for	2023	2024	+/− Previous Year	2025	+/− Previous Year	2026	+/− Previous Year	2027	+/− Previous Year
metal pipes[1]	2,71	2,47	-8,86 %	2,32	-6,07 %	2,19	-5,60 %	2,19	0,00 %
PP-R pipes	0	0	– %	0	– %	0	– %	0	– %
flexible pipes[2]	0,96	0,87	-9						
Alu-Multilayer pipes[3]	2,42	2,22	-8						
Total	**6,09**	**5,56**	**-8,**						

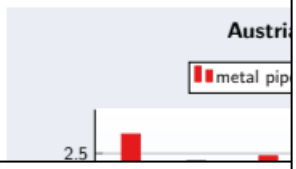
Fittings in million pieces
[1]Carbon steel/steel, copper + stainless steel
[2] PEX, PE-RT + PB pipes
[3] PEX or PE-RT/Al/...

Sanitary / Hot & Cold Water Systems - Austria

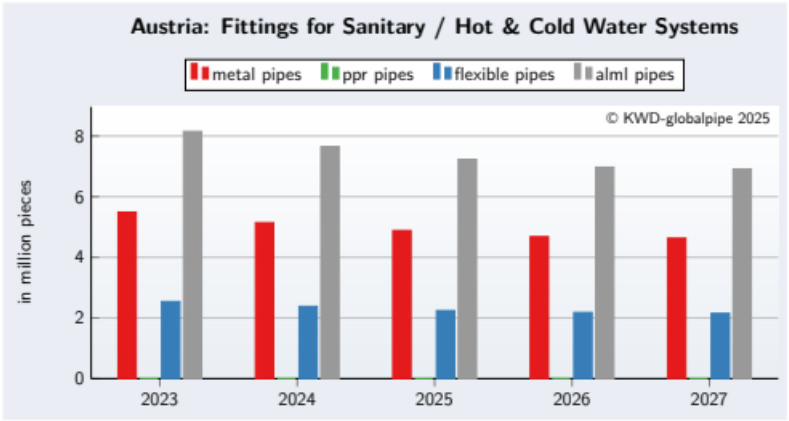
Fittings for	2023	2024	+/− Previous Year	2025	+/− Previous Year	2026	+/− Previous Year	2027	+/− Previous Year
metal pipes[1]	5.49	5.14	-6.38 %	4.88	-5.06 %	4.68	-4.10 %	4.63	-1.07 %
PP-R pipes	0	0	– %	0	– %	0	– %	0	– %
flexible pipes[2]	2.54	2.38	-6.30 %	2.24	-5.88 %	2.18	-2.68 %	2.15	-1.38 %
Alu-Multilayer pipes[3]	8.15	7.65	-6.13 %	7.23	-5.49 %	6.97	-3.60 %	6.91	-0.86 %
Total	**16.18**	**15.17**	**-6.24 %**	**14.35**	**-5.41 %**	**13.83**	**-3.62 %**	**13.69**	**-1.01 %**

Fittings in million pieces
[1]Carbon steel/steel, copper + stainless steel
[2] PEX, PE-RT + PB pipes
[3] PEX or PE-RT/Al/...

Radiator Connection - Austria



Sanitary / Hot & Cold Water Systems - Austria

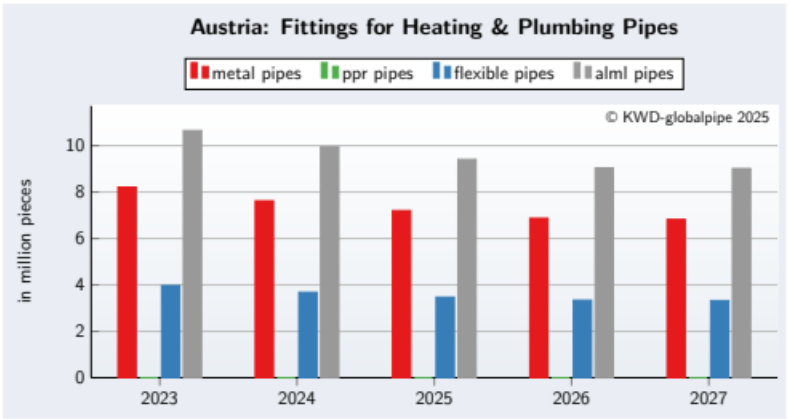


Heating & Plumbing Pipes - Austria

Fittings for	2023	2024	+/− Previous Year	2
metal pipes[1]	8.21	7.62	-7.19 %	
PP-R pipes	0.00	0.00	– %	
flexible pipes[2]	3.97	3.68	-7.30 %	
Alu-Multilayer pipes[3]	10.65	9.95	-6.57 %	
Total	**22.83**	**21.25**	**-6.92 %**	**2**

Fittings in million pieces
[1]Carbon steel/steel, copper + stainless steel
[2] PEX, PE-RT + PB pipes
[3] PEX or PE-RT/Al/...

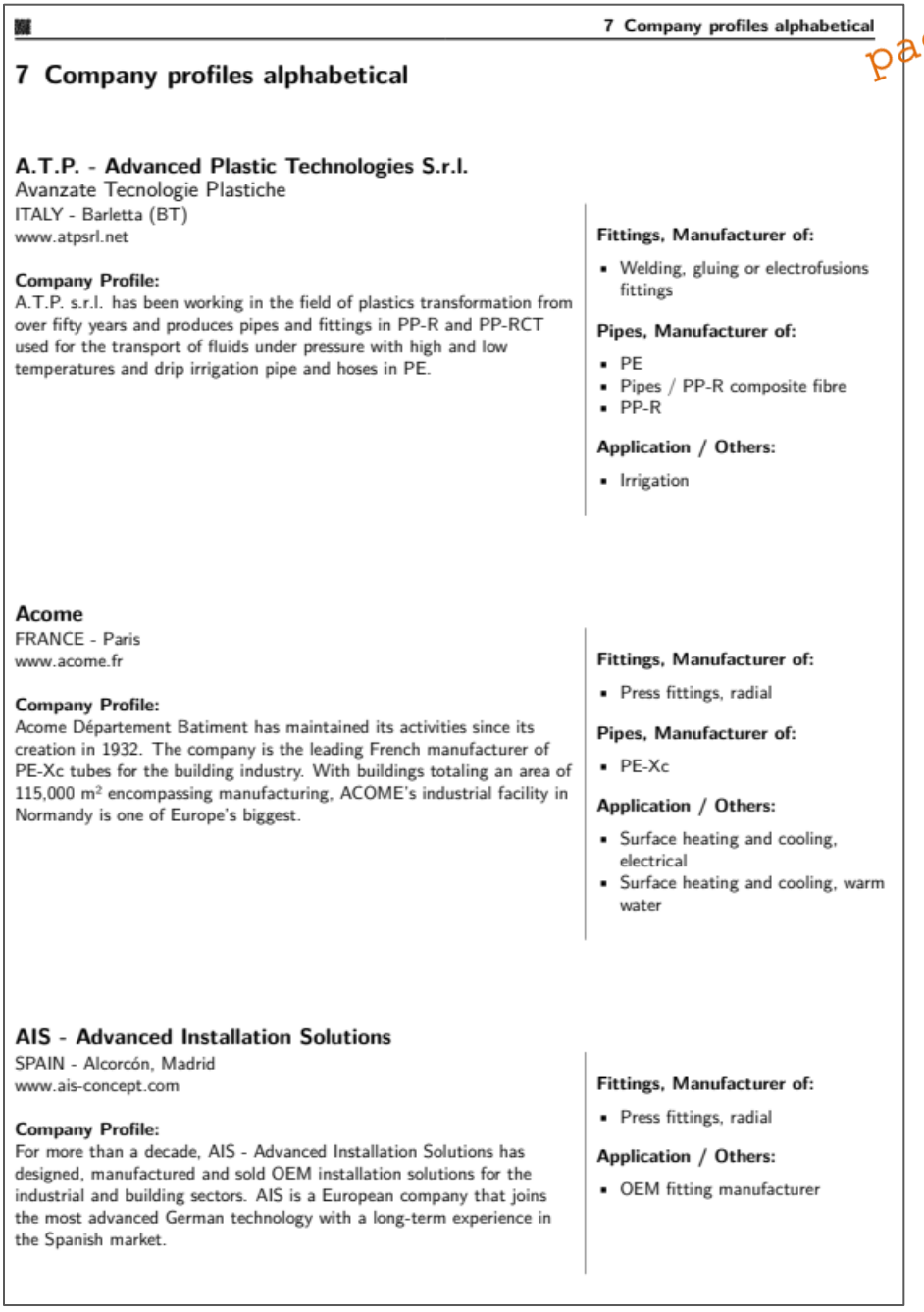
Heating & Plumbing Pipes - Austria



Chapter 7 Company profiles alphabetical

This chapter contents company profiles to European producers and distributors of fittings.

In addition to the address and a brief description of the company, keywords such as fitting or pipe manufacturer or distributor are used to describe the company.



7 Company profiles alphabetical

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A.T.P. - Advanced Plastic Technologies S.r.l.
Avanzate Tecnologie Plastiche
ITALY - Barletta (BT)
www.atpsrl.net

Company Profile:
A.T.P. s.r.l. has been working in the field of plastics transformation from over fifty years and produces pipes and fittings in PP-R and PP-RCT used for the transport of fluids under pressure with high and low temperatures and drip irrigation pipe and hoses in PE.

Fittings, Manufacturer of:
- Welding, gluing or electrofusions fittings

Pipes, Manufacturer of:
- PE
- Pipes / PP-R composite fibre
- PP-R

Application / Others:
- Irrigation

Acome
FRANCE - Paris
www.acome.fr

Company Profile:
Acome Département Batiment has maintained its activities since its creation in 1932. The company is the leading French manufacturer of PE-Xc tubes for the building industry. With buildings totaling an area of 115,000 m² encompassing manufacturing, ACOME's industrial facility in Normandy is one of Europe's biggest.

Fittings, Manufacturer of:
- Press fittings, radial

Pipes, Manufacturer of:
- PE-Xc

Application / Others:
- Surface heating and cooling, electrical
- Surface heating and cooling, warm water

AIS - Advanced Installation Solutions
SPAIN - Alcorcón, Madrid
www.ais-concept.com

Company Profile:
For more than a decade, AIS - Advanced Installation Solutions has designed, manufactured and sold OEM installation solutions for the industrial and building sectors. AIS is a European company that joins the most advanced German technology with a long-term experience in the Spanish market.

Fittings, Manufacturer of:
- Press fittings, radial

Application / Others:
- OEM fitting manufacturer