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Global Ethylene Chloride Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Ethylene Chloride market size was valued at US$ 10501 million in 2025 and is forecast to a readjusted size of US$ 12734 million by 2032 with a CAGR of 2.8% during review period.

In 2025, the gIn 2025, the global sales volume of Ethylene Chloride reached 54.00 million MT, with a global average price of approximately 189 US$/MT and an industry average gross margin of approximately 12%.

The major upstream raw materials include ethylene, chlorine, hydrogen chloride, and others.

Major upstream suppliers include ExxonMobil, LyondellBasell, SABIC, Shell, Dow, INEOS, Sinopec, PetroChina, Olin, OxyChem, Westlake, Formosa Plastics, Shin-Etsu/Shintech, Hanwha Solutions, AGC, Tosoh, and others.

Major downstream customers include Reliance Industries, Finolex Industries, Chemplast Sanmar, Westlake, Shintech, AGC, and others.

Ethylene Chloride is an important chlorinated organic compound with the molecular formula C?H?Cl? and a relative molecular mass of approximately 98.96. At room temperature, it is a colorless, transparent liquid with a mild odor; it is flammable, toxic, slightly soluble in water, and functions effectively as an organic solvent.

Industrially, ethylene dichloride is primarily produced from ethylene via direct chlorination or oxychlorination processes, serving as a key basic chemical intermediate

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linking the chlor-alkali industry with the PVC supply chain. Approximately 95% of the ethylene dichloride produced is used to manufacture vinyl chloride monomer (VCM), which is subsequently polymerized to produce polyvinyl chloride (PVC). The remaining small portion is utilized as an organic solvent or fumigant, and in the synthesis of various chemicals and chlorinated organic intermediates.

Ethylene dichloride is a key basic chemical raw material in the chlor-alkali and polyvinyl chloride (PVC) industrial chains. Primarily produced via direct chlorination and oxychlorination of ethylene, it serves as a core intermediate for the manufacture of vinyl chloride monomer (VCM). Global EDC demand is heavily concentrated in VCM production—which is subsequently used to manufacture PVC resin—meaning the EDC market is closely linked to downstream PVC demand across sectors such as construction, infrastructure, piping, cabling, packaging, and automotive manufacturing. The global EDC industry is characterized by a high degree of integration; major chlor-alkali, ethylene, and PVC producers typically adopt a complete "ethylene–EDC–VCM–PVC" industrial chain layout to reduce raw material costs and enhance supply stability. Over 90% of global EDC consumption is dedicated to VCM production, with other applications including the manufacture of ethylenediamine, chlorinated solvents, and fine chemical intermediates.

In terms of market demand, the PVC industry is the primary driver of EDC growth. Driven by global urbanization, sustained investment in infrastructure, and the upgrading of building materials, demand for PVC products—such as pipes, profiles, flooring, waterproofing materials, and wire and cable sheathing—remains stable, providing a long-term foundation for EDC demand. In regions such as Asia, the Middle East, and North America, the expansion of PVC production capacity and the development of integrated chemical complexes continue to fuel EDC consumption growth. The North American market maintains strong competitiveness in the EDC, VCM, and PVC sectors, benefiting from low-cost ethylene supplies and a mature chlor-alkali industrial chain; meanwhile, China has emerged as a major global market for EDC consumption, driven by its massive PVC production capacity.

Regarding production processes, EDC is primarily manufactured using two methods: direct chlorination and oxychlorination. Direct chlorination involves the reaction of ethylene with chlorine gas; this mature process is well-suited for integrated facilities with abundant chlorine supplies. Oxychlorination involves the reaction of ethylene, hydrogen chloride, and oxygen, allowing for the effective utilization of hydrogen chloride—a byproduct of VCM cracking—thereby improving chlorine utilization efficiency. Large-scale PVC producers typically employ a combination of these two processes to enable the

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recycling of chlorine resources, thereby enhancing overall economic efficiency and environmental performance. In the future, as requirements for low-carbon chemical production tighten, manufacturers will place greater emphasis on energy consumption, the utilization of by-products, and carbon emission control.

Regarding the industry chain structure, the upstream sector primarily comprises basic raw materials and energy sources—such as ethylene, chlorine, oxygen, electricity, and steam—with the costs of ethylene and chlorine significantly influencing the economic viability of EDC production. The midstream sector consists mainly of EDC producers that manufacture commercial-grade EDC through chlorination, purification, storage, and transportation, subsequently supplying it to VCM units or other chemical users. The downstream sector is dominated by PVC resin production, which accounts for the vast majority of consumption, while also encompassing niche areas such as ethylenediamine, chlorinated solvents, pharmaceutical intermediates, and specialty chemicals. Given that EDC is classified as a hazardous chemical—requiring stringent standards for storage, transport, safety management, and production facilities—large-scale integrated enterprises enjoy a distinct advantage in supply chain stability.

In terms of the competitive landscape, the EDC industry is characterized by high capital and technical barriers to entry; the market is primarily populated by large chemical enterprises possessing advantages in ethylene resources, chlor-alkali capabilities, and PVC integration. Internationally, companies such as OxyChem (Occidental Petroleum), Westlake, Olin, Dow, INEOS, Formosa Plastics, and SABIC maintain a presence across the vinyl chloride value chain. The Chinese market features enterprises with established foundations in the PVC and chlor-alkali industries, such as Xinjiang Zhongtai Chemical, Junzheng Group, Shanghai Chlor-Alkali Chemical, Juhua Group, and Xinjiang Tianye. Competition in the industry centers not merely on EDC product sales, but on factors such as raw material security, energy costs, facility scale, upstream-downstream synergy, and regional supply capabilities.

Regionally, the Asia-Pacific area is the largest consumer of EDC, driven primarily by PVC demand in China, Southeast Asia, and other emerging markets. China boasts the world's largest PVC production system, providing strong support for EDC demand; meanwhile, domestic enterprises are continuously advancing chlor-alkali integration and extending their value chains to enhance raw material self-sufficiency. The North American market leverages abundant ethane resources and low-cost ethylene supplies to maintain a competitive edge in EDC exports and large-scale PVC value chains. The European market is relatively mature, with growth driven more by facility upgrades, green production initiatives, and the circular economy rather than the addition of large-

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scale production capacity.

Regarding technological trends, the future of the EDC industry will focus on low-carbon production, resource recycling, and the enhancement of facility efficiency. On one hand, enterprises will further optimize oxychlorination processes to enhance hydrogen chloride recovery and utilization efficiency while reducing by-product emissions. On the other hand, driven by the rising demand for green PVC and low-carbon building materials, EDC producers must focus on managing their carbon footprints and optimizing their energy structures. Furthermore, digital production control, smart factory management, and the development of large-scale integrated production bases will serve as key avenues for boosting production efficiency.

Regarding market opportunities, the future growth of ethylene dichloride (EDC) will be driven primarily by global infrastructure development, the growing demand for PVC substitute materials, and urbanization in emerging economies. The construction sector will remain the largest source of demand, characterized by stable requirements for long-term applications such as water supply and drainage piping, electrical conduits, and architectural profiles. Simultaneously, trends toward automotive lightweighting and electrification, along with the expansion of the new energy industry, will indirectly stimulate demand for PVC-related materials, creating new growth potential for the EDC sector. For manufacturers, enhancing competitiveness in the future will hinge on expanding integrated operations, reducing energy consumption, improving raw material utilization efficiency, and developing low-carbon production pathways.

Overall, while ethylene dichloride is a mature basic chemical product—typically growing at a slower pace than the emerging materials sector—it benefits from strong, inelastic demand across the industrial chain. Future industry competition will shift from mere capacity expansion to a contest based on resource advantages, integration capabilities, energy cost control, and green production proficiency. Enterprises that possess stable access to ethylene and chlorine resources, a comprehensive PVC value chain, and advanced environmental protection technologies will maintain a stronger competitive edge in the long run.

Report Scope

This report is a detailed and comprehensive analysis for global Ethylene Chloride market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this

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report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Ethylene Chloride market size and forecasts, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Ethylene Chloride market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Ethylene Chloride market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Ethylene Chloride market shares of main players, shipments in revenue ($ Million), sales quantity (Kilotons), and ASP (US$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Ethylene Chloride

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Ethylene Chloride market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies

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covered as a part of this study include Formosa Plastics, Westlake, Shin-Etsu Chemical, Olin, Hanwha Solutions, Tosoh, Tianjin Bohai Chemical, Reliance Industries, OxyChem, Arvand Petrochemical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Ethylene Chloride market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Standard Purity Grade ((Purity < 99.9%)

High Purity Grade (Purity ?99.9%)

Market segment by Production Process

Direct Chlorination EDC

Oxychlorination EDC

Market segment by Water Content

Water Content <20 ppm

Water Content 20-50 ppm

Water Content 50-100 ppm

Others

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Market segment by Application

VCM

Chlorinated Solvents & Chemicals

Others

Major players covered

Formosa Plastics

Westlake

Shin-Etsu Chemical

Olin

Hanwha Solutions

Tosoh

Tianjin Bohai Chemical

Reliance Industries

OxyChem

Arvand Petrochemical

SABIC

LG Chem

Shanghai Chloroalkali Chemical

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Wanhua Chemical

AGC

INEOS

Vynova

KEM ONE

Dow

Qatar Vinyl Company

Qingdao Haiwan Chemical

Braskem

RusVinyl

ORLEN

Sulfindo Adiusaha

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

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Chapter Outline

Chapter 1, to describe Ethylene Chloride product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Ethylene Chloride, with price, sales quantity, revenue, and global market share of Ethylene Chloride from 2021 to 2026.

Chapter 3, the Ethylene Chloride competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Ethylene Chloride breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Ethylene Chloride market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Ethylene Chloride.

Chapter 14 and 15, to describe Ethylene Chloride sales channel, distributors, customers, research findings and conclusion.

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