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# Global Ethylene Chloride Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Ethylene Chloride market size is expected to reach $ 12734 million by 2032, rising at a market growth of 2.8% CAGR during the forecast period (2026-2032).

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 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),

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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 recycling of chlorine resources, thereby enhancing overall economic efficiency and environmental performance. In the future, as requirements for low-carbon chemical

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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-scale production capacity.

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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 studies the global Ethylene Chloride production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Ethylene Chloride and provides market size (US$ million) and Year-over-Year (YoY) Growth,

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considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Ethylene Chloride that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Ethylene Chloride total production and demand, 2021-2032, (Kilotons)

Global Ethylene Chloride total production value, 2021-2032, (USD Million)

Global Ethylene Chloride production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Ethylene Chloride consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Ethylene Chloride domestic production, consumption, key domestic manufacturers and share

Global Ethylene Chloride production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Ethylene Chloride production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Ethylene Chloride production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Ethylene Chloride market

## Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Ethylene Chloride Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Ethylene Chloride Market, Segmentation by Type:

Standard Purity Grade ((Purity < 99.9%)

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High Purity Grade (Purity ?99.9%)

## Global Ethylene Chloride Market, Segmentation by Production Process:

Direct Chlorination EDC

Oxychlorination EDC

## Global Ethylene Chloride Market, Segmentation by Water Content:

Water Content <20 ppm

Water Content 20-50 ppm

Water Content 50-100 ppm

Others

## Global Ethylene Chloride Market, Segmentation by Application:

VCM

Chlorinated Solvents & Chemicals

Others

# Companies Profiled:

Formosa Plastics

Westlake

Shin-Etsu Chemical

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Olin

Hanwha Solutions

Tosoh

Tianjin Bohai Chemical

Reliance Industries

OxyChem

Arvand Petrochemical

SABIC

LG Chem

Shanghai Chloroalkali Chemical

SINOPEC

Wanhua Chemical

AGC

INEOS

Vynova

KEM ONE

Dow

Qatar Vinyl Company

Qingdao Haiwan Chemical

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Braskem

RusVinyl

ORLEN

Sulfindo Adiusaha

## Key Questions Answered

1. How big is the global Ethylene Chloride market?
2. What is the demand of the global Ethylene Chloride market?
3. What is the year over year growth of the global Ethylene Chloride market?
4. What is the total value of the global Ethylene Chloride market?
5. Who are the Major Players in the global Ethylene Chloride market?
6. What are the growth factors driving the market demand?

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