

Global PVDC Emulsions 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 PVDC Emulsions market size was valued at US\$ 250 million in 2025 and is forecast to a readjusted size of US\$ 373 million by 2032 with a CAGR of 5.9% during review period.

PVDC latex (also known as PVDC emulsion) is a stable aqueous polymeric colloidal dispersion system prepared via free-radical emulsion polymerization, with vinylidene chloride (VDC) as the main polymerizable monomer (typically accounting for ~50% by mass), most commonly in copolymer systems such as VDC-vinyl chloride (VDC-VC), VDC-methyl acrylate (VDC-MA) and VDC-acrylate systems, under the action of emulsifiers/protective colloids and an initiator system. It is commercially supplied as a wet-state sold latex product consisting of nanoscale latex particles dispersed in an aqueous phase, and can form a continuous and dense PVDC (copolymer) barrier layer on substrate surfaces through a coating-drying-film formation process.

In contrast to PVDC resins produced via suspension polymerization, which are in granular or powder form and mainly applied to thermoplastic processing including extrusion, film blowing and calendering (e.g., for cling films and rigid sheets), the core processing methods of PVDC latex are coating and lamination rather than thermoplastic processing. Its key properties are jointly determined by the high polarity and dense crystallization/packing characteristics of the polymer segments, combined with the compactness of the formed film. In commercial aqueous coating systems, it typically delivers the comprehensive barrier advantage of simultaneous high oxygen barrier and high water vapor barrier performance, and also features grease resistance, resistance to most chemical media, as well as formulation tunability and process compatibility for a wide range of substrates including films, paper substrates, metals and fabrics.

Typical applications of PVDC latex include barrier coatings for food and pharmaceutical packaging (such as high-barrier coated films for flexible packaging, paper-based barrier coatings, and barrier layers in blister packaging structures), industrial protective and anti-corrosion primer/barrier coatings, as well as functional coating scenarios with stringent requirements for chemical resistance, hydrothermal resistance and penetration resistance. Its core value lies in significantly enhancing the barrier and media resistance of substrates via a micron-scale ultra-thin coating, while enabling low-VOC processing with the aqueous system and compatibility with downstream processes including heat sealing, lamination and printing. Furthermore, through the design of monomer and additive systems, engineering trade-offs and customized optimization can be achieved across key performance indicators including barrier properties, adhesion, flexibility, heat resistance, migration resistance and biosafety.

In terms of price, the average price of food-grade latex is between \$1,400 and \$1,700 per ton; while the average price of pharmaceutical-grade latex is 2 to 2.5 times that of food-grade latex.

As the only commercially available waterborne coating material in the world with unmatched dual high-barrier performance against both oxygen and water vapor, PVDC latex delivers a core competitive advantage: its micron-scale ultra-thin coating can enhance the barrier properties of substrates by dozens of times. It has become the core base material for high-barrier functional coatings in food and pharmaceutical packaging, industrial protection and other fields, securing irreplaceable niche value in the global high-performance functional polymer materials segment.

From a market fundamentals perspective, the PVDC latex industry is in a steady upward expansion cycle, with a projected compound annual growth rate (CAGR) of 6.06% from 2026 to 2032. Regionally, the Asia-Pacific market has emerged as the core engine of global growth. Within this, the Chinese market accounted for 25.25% of global revenue in 2025, ranking among the world's most critical growth markets (driven primarily by food packaging, followed by pharmaceutical packaging), with an expected CAGR of 6.64% over the next six years and a market size set to exceed USD 96 million by 2032. The Indian market (led primarily by pharmaceutical packaging, followed by food packaging) held a 20.88% share of the global market in 2025, with a projected CAGR of 7.5% over the next six years. The dual-core market structure led by China and India will continue to strengthen. Meanwhile, Europe, as a core market for pharmaceutical packaging, still accounted for 42.07% of global production share in 2025.

The industry's competitive landscape is highly concentrated: the world's top three manufacturers – Asahi Kasei, Syensqo, and Borchers (Milliken) – hold a combined 86.08% of the global market share, with Syensqo long dominating high-end segments such as pharmaceutical packaging. At the same time, domestic Chinese enterprises are accelerating technological breakthroughs and domestic substitution. Local manufacturers including Zhejiang Juhua Group and Zhejiang Keguan Polymer Co., Ltd. have established large-scale supply capacity in the food and pharmaceutical packaging sectors, gradually breaking the technological and market monopoly of foreign-funded enterprises.

In the long term, pharmaceutical packaging, as the core growth driver of the industry, contributed 72.71% of global revenue share in 2025 and will maintain a growth rate outpacing the industry average in the years ahead. Coupled with the upgrading of China's food contact material standards, the improvement of the cold chain logistics system, policy support for high-performance new materials under China's 15th Five-Year Plan, and growth opportunities in markets along the Belt and Road Initiative, the PVDC latex industry has a clear long-term growth trajectory. Despite facing cyclical challenges from sustainable packaging regulations and alternative materials, the industry will maintain a steady growth momentum backed by its irreplaceable dual high-barrier properties, as well as the technological iteration and capacity expansion of domestic Chinese enterprises. Local players are well-positioned to achieve dual growth in both global market share and commercial value.

This report is a detailed and comprehensive analysis for global PVDC Emulsions 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 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 PVDC Emulsions market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PVDC Emulsions market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices

(US\$/Ton), 2021-2032

Global PVDC Emulsions market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PVDC Emulsions market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), 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 PVDC Emulsions
- 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 PVDC Emulsions market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Syensqo, Asahi Kasei, Fujian Liangjingjing New Material, Shandong Xinlu Chemical, Lubrizol, Zhejiang Keguan, Borchers (Milliken), Zhejiang Juhua, etc.

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

Market Segmentation

PVDC Emulsions 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 segment by Type

50%

55%

60%

Market segment by Application

Food Packaging

Pharmaceutical Packaging

Industrial

Major players covered

Syensqo

Asahi Kasei

Fujian Liangjingjing New Material

Shandong Xinlu Chemical

Lubrizol

Zhejiang Keguan

Borchers (Milliken)

Zhejiang Juhua

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PVDC Emulsions product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the PVDC Emulsions 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 PVDC Emulsions 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 PVDC Emulsions.

Chapter 14 and 15, to describe PVDC Emulsions sales channel, distributors, customers, research findings and conclusion.

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