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Polyvinyl Chloride (PVC) Market by Raw Material (EDC & Acetylene), Polymerization Process, Product, End User Industry (Construction, Automotive, Electrical, Packaging, Footwear), Type of Application, & Geography – Trends and Forecasts to 2018

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Abstracts

Polyvinyl chloride (PVC) is among the most widely used polymers that finds its place in a diverse range of applications, owing to its properties and price effectiveness. It is manufactured by employing vinyl chloride monomer (VCM) as feedstock, which itself can be manufactured by ethylene dichloride and acetylene; EDC based process is more prevalent due to environmental concerns related to acetylene based route to VCM. More than 90.0% of the PVC production is by suspension resin polymerization process, while some considerable number of processes also use emulsion and bulk polymerization.

The demand for PVC is dominated by the Asia-Pacific region, which is bound to grow, driven primarily by the huge consumpion by China and the potential of the Indian market. The region consumes more than half of the global PVC produced annually, while within the Asia-Pacific, China and India collectively consumed more than 75.0% of the regional demand. Rigid applications of PVC hold a major share in the Asia-Pacific market, but significant investments in phthalate as well as non-phthalate plasticizers indicate a considerable growth for flexible PVC applications in the region. ROW is expected to be the fastest growing PVC market, while Europe is also expected to add significant market demand by 2018, which is driven by strong anticipated growth in Russia and Turkey.

The demand for PVC is strong through the manufacturers of pipes, fittings, profiles, and tubes that account for more than 60.0% of the total global consumption. The PVC pipes

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are widely used in building, construction, chemical, energy, and other industrial applications. Consumption of PVC for the manufacturing of profile & tubes and pipe & fittings is expected to grow at a highest CAGR of about 5.34% and 5.15%, from2013 to 2018. The construction industry, was the major end user industry, using PVC products, accounting for more than 65.00% of the total global PVC consumption. The increasing demand for electric vehicles, wood plastic composites, and innovation of bio-based additives, for the improvement of recycled PVC, enclose major opportunities in the PVC market.

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About

PVC is one of the most widely used plastics in the world. It is produced by polymerizing vinyl chloride monomers. PVC has an amorphous structure with polar chlorine atoms and possesses fire retarding properties, durability, and oil/chemical resistance. It is added with modifiers to modify its property according to the end-user demand. Various properties of PVC such as abrasion resistance, light weight, good mechanical strength, and toughness enable its wide use in building & construction, automotive, packaging, and electrical industries. The overall demand for PVC has grown significantly in the past, and this trend is expected to continue in the future on account of building and construction industry in Asia-Pacific. It has been estimated that the global PVC consumption may reach XX KT by 2018, at a CAGR of XX% from 2013 and 2018.

The global PVC industry is witnessing high growth on account of increasing applications, technological advancements, and growing demand in the Asia-Pacific region. It is largely used in manufacturing various products such as pipe & fittings, profiles & tubes, film & sheets, wire & cables, bottles, and others.

The overall global market for PVC is estimated grow from about XX KT in 2012 to XX KT by 2018, at a CAGR of XX% from 2013 to 2018. Asia-Pacific dominated the global PVC market and consumed around XX KT in 2012 and is expected to grow at a CAGR of XX% from 2013 to 2018. Europe and ROW were among the major consumers, with an estimated consumption of about XX KT and XX KT respectively in 2012. ROW is expected to be the fastest-growing PVC market, with the highest CAGR of XX% during the forecast period.

The global PVC market is estimated to grow from about $XX million in 2012 to $XX million by 2018, at a CAGR of XX% from 2013 to 2018. Asia-Pacific led the global PVC market by accounting for about XX% of the total value in 2012 and is expected to grow at a CAGR of XX% during the forecast period. ROW and Europe constitute second- and third-largest market for PVC with a value of about $XX million and $XX million respectively in 2012. These two regions collectively accounted for about XX% of the total value garnered by the global PVC market in 2012. The ROW PVC market is expected to grow at a fast pace of XX% CAGR from 2013 to 2018. The drivers of the industry are identified as growing demand in Asia-Pacific and growth in building & construction industry around the globe. The restraining factors are identified as, economic slowdown in Europe and North America and environmental constraints on phthalate modified PVC. Industry players are following strategies such as capacity

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expansions and technological innovations to address the demands generated by end-user industries in developing countries. Key participant in the market include Shin-Etsu Chemical Co. Ltd. (Japan), Formosa Plastics Group (Taiwan), Occidental Petroleum Corporation (U.S.), INEOS (U.K.), and Solvay S.A. (Belgium), AXIALL Corporation (U.S.), Mexichem S.A.B. (Mexico), Kem One (France), Vinnolit GmbH & Co. KG (Germany), and Xinjiang Zhongtai Chemical Co. Ltd. (China).

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