

Vinyl Chloride and Vinylidene Chloride Resin Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Vinyl Chloride and Vinylidene Chloride Resin Market Summary

Introduction

Vinyl chloride and vinylidene chloride resins are critical materials in the polymer industry, with vinylidene chloride (VDC) primarily used to produce polyvinylidene chloride (PVDC), a high-performance thermoplastic known for its exceptional barrier properties against moisture, oxygen, and aromas. Vinyl chloride (VC) is polymerized to form polyvinyl chloride (PVC), a versatile thermoplastic used across multiple industries. The VDC-VC copolymer resin, a key segment of PVDC, is widely applied in food packaging, particularly for sausage casings and cling films, due to its excellent clarity, flexibility, and chemical resistance. PVDC is also utilized in fiber, film, and emulsion/latex forms, with applications extending to pharmaceuticals, electronics, and industrial coatings. Japan leads global VDC-VC copolymer resin production with a capacity of 90,000 tons, accounting for 55.21% of the global total, driven by its robust demand for cling films and sausage casings. China is the largest consumer of sausage casings, while its cling film market is in early development. Europe and North America have lower demand for these applications, while Vietnam shows moderate demand for casings. The market faces challenges from global overcapacity, with 40–50% of VDC-VC copolymer resin capacity underutilized, and environmental concerns over chlorinated polymers. Trends include sustainable PVDC formulations, recyclable films, and water-based latex coatings. The industry is moderately consolidated, with key players like Kureha and Asahi Kasei driving innovation, while China's Zhejiang Juhua expands capacity to meet domestic demand. Since April 2017, China has imposed anti-dumping measures on VDC-VC copolymer resin imports from Japan, impacting trade

dynamics.

Market Size and Growth Forecast

The global vinyl chloride and vinylidene chloride resin market is projected to reach USD 1.0–2.0 billion by 2025, with an estimated compound annual growth rate (CAGR) of 3%–5% through 2030. Growth is driven by rising demand for PVC in construction and PVDC in food and pharmaceutical packaging, supported by capacity expansions in Asia Pacific and advancements in sustainable materials.

Regional Analysis

Asia Pacific is expected to lead the vinyl chloride and vinylidene chloride resin market with a growth rate of 4.5%–6.5%, driven by China, Japan, and Vietnam. China dominates as the largest consumer of sausage casings, with 130 tons of VDC-VC copolymer resin demand in 2020, and its cling film market is growing rapidly due to urbanization and rising consumer spending. Zhejiang Juhua's capacity expansions strengthen China's position. Japan, with 55.21% of global VDC-VC resin capacity (90,000 tons), leads in cling film production, driven by companies like Kureha and Asahi Kasei. Vietnam's growing food processing industry fuels moderate demand for casings.

North America follows with a growth rate of 3%–5%, led by the United States and Canada. The U.S. market focuses on PVDC films and latex for pharmaceutical packaging and industrial coatings, with trends emphasizing recyclable materials. Canada's smaller market grows steadily, driven by food packaging and construction applications for PVC.

Europe, with a growth rate of 2.5%–4.5%, is driven by Germany, France, and the UK. Demand for sausage casings and cling films is lower than in Asia, with Germany focusing on pharmaceutical and industrial applications. EU regulations on sustainability push innovation in eco-friendly PVDC formulations.

South America, with a growth rate of 2%–4%, sees demand in Brazil and Argentina, driven by food packaging and construction. Brazil's growing food exports support PVDC film use, though limited local production hinders growth.

The Middle East and Africa, with a growth rate of 1.5%–3.5%, are led by the UAE and South Africa. The UAE's food and beverage sector drives PVDC film demand, while South Africa's construction industry supports PVC applications. Limited infrastructure

restricts broader adoption.

Application Analysis

PVDC Fiber: Expected to grow at 3%–5%, PVDC fiber is used in textiles and industrial applications for its chemical resistance and durability. Trends focus on lightweight, high-strength fibers for filtration and protective fabrics, particularly in Japan and China.

PVDC Film: With a growth rate of 4%–6%, this segment dominates due to its use in food packaging (e.g., sausage casings, cling films) and pharmaceuticals for its superior barrier properties. Trends include recyclable, multilayer films and chlorine-free coatings, with strong demand in China and Japan.

PVDC Emulsion/Latex: Projected to grow at 3.5%–5.5%, PVDC latex is used in coatings and adhesives for its water resistance and adhesion. Water-based latex formulations are gaining traction in North America and Europe for sustainable industrial applications.

Others: Expected to grow at 2.5%–4.5%, this segment includes niche applications like hoses, gaskets, and specialty coatings. Trends focus on eco-friendly alternatives and high-performance polymers for electronics and automotive sectors.

Key Market Players

Lubrizol: A U.S.-based company, Lubrizol produces PVDC resins and latex for coatings, adhesives, and packaging, focusing on high-performance and sustainable solutions for global markets.

Kureha: A Japanese manufacturer, Kureha specializes in VDC-VC copolymer resins for food packaging, particularly cling films and sausage casings, with a strong emphasis on innovation and sustainability.

Asahi Kasei: A Japanese firm, Asahi Kasei produces PVDC films and resins for food, pharmaceutical, and industrial applications, leveraging advanced polymer technologies.

Zhejiang Juhua: A Chinese company, Zhejiang Juhua is a major producer of VDC and PVDC resins, expanding capacity to meet China's growing demand for food packaging and industrial applications.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. High capital investment, technical expertise, and environmental compliance create barriers, but overcapacity (40–50% for VDC-VC resins) lowers entry costs for new players, particularly in China.

Threat of Substitutes: Moderate to High. Alternatives like polyethylene, EVOH, and bio-based polymers compete with PVDC in packaging due to sustainability concerns. PVC faces competition from polypropylene and recycled plastics in construction.

Bargaining Power of Buyers: High. Large buyers in food, pharmaceutical, and construction sectors have significant leverage due to multiple suppliers and overcapacity, particularly in Asia Pacific, though specialized PVDC formulations limit switching.

Bargaining Power of Suppliers: Moderate to High. Suppliers of raw materials like vinyl chloride and chlorine are concentrated, giving them leverage, especially amid global supply chain disruptions. Stable supply chains in Asia Pacific moderate this power.

Competitive Rivalry: High. The market is competitive, with Kureha and Asahi Kasei leading in high-value applications, while Zhejiang Juhua focuses on cost-competitive production. Overcapacity and anti-dumping measures in China intensify price competition.

Market Opportunities and Challenges

Opportunities

Food Packaging Demand: Rising consumption of processed foods in China and Vietnam drives demand for PVDC films in sausage casings and cling films, supported by urbanization and e-commerce growth.

Sustainable Innovations: Growing regulatory pressure in Europe and North America creates opportunities for recyclable and chlorine-free PVDC films and latex, aligning with circular economy goals.

Construction Growth: Expanding construction in Asia Pacific and South America boosts PVC demand for pipes, fittings, and cables, supporting vinyl chloride

resin growth.

Capacity Expansions: Zhejiang Juhua's investments in VDC production strengthen supply chains, meeting rising demand in China's packaging and industrial sectors.

Emerging Market Potential: Vietnam and India offer growth opportunities for PVDC films due to expanding food processing and consumer goods industries.

Challenges

Overcapacity Issues: Global VDC-VC copolymer resin overcapacity (40–50%) pressures pricing and profitability, particularly for Japanese producers facing China's anti-dumping measures.

Environmental Concerns: Chlorinated polymers like PVDC and PVC face scrutiny in Europe and North America, increasing compliance costs and pushing demand for bio-based alternatives.

Regulatory Pressures: Stringent regulations on chemical emissions and waste disposal in the EU and China raise production costs and complexity for manufacturers.

Raw Material Volatility: Fluctuations in vinyl chloride and chlorine prices, coupled with supply chain disruptions, challenge cost stability for resin producers.

Competition from Alternatives: Bio-based polymers and high-barrier materials like EVOH threaten PVDC's market share in eco-conscious markets, requiring continuous innovation.

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