

Research Report on China's Polyvinyl Chloride (PVC) Industry, 2018-2022

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Abstracts

Description

Polyvinyl chloride (PVC) is an important synthetic organic material. As one of the five most common synthetic resins, it is widely used in building materials, industrial products, daily necessities, pipes, wires and cables, packaging film, foaming materials, sealing materials, etc.

China is the world's largest PVC producer and consumer. At the end of 2017, China's PVC production capacity exceeded 20 million tons/year. In 2017, the production volume of PVC in China was approximately 17.9 million tons, an increase of 7.2% year-on-year.

In 2017, there were more than 60 PVC producers in China, 20 of which had an annual capacity of 400,000 tons or more. Most of them are located in Inner Mongolia, Xinjiang, Shandong and Qinghai. The two largest PVC producers are situated in Xinjiang, namely, Xinjiang Zhongtai Chemical Co., Ltd. (with an annual production capacity of 2.2 million tons) and Xinjiang Tianye Co., Ltd. (with an annual production capacity of 1.2 million tons). In China, PVC is produced in the calcium carbide method or in the ethylene method. The calcium carbide method accounts for over 80% of China's PVC production capacity. PVC produced in the calcium carbide method is mainly used in the production of low-end pipes because it contains a large amount of vinyl chloride residues. While PVC made from ethylene, containing little vinyl chloride residue, can be used to produce refined high-end PVC products that cannot be produced with PVC made from calcium carbide. PVC made from ethylene and PVC made from calcium carbide can hardly replace each other.

Economically developed regions such as Guangdong and South China are the major

consumers of PVC in China. Guangdong accounts for over 20% of the total PVC consumption in China; Fujian, Shanghai, Jiangsu and Zhejiang in East China account for more than 30% of the national total.

The downstream applications of China's PVC mainly include construction materials, pipes, etc. Among building materials, sections, doors and windows account for about 30% PVC consumption; pipes account for about 30%; and film accounts for nearly 10%.

According to CRI's market research, China's PVC industry is still expanding its production capacity in 2018-2019. It is expected that by the end of 2020, China's annual PVC production capacity will exceed 27 million tons.

China's PVC industry is playing an increasingly important role in the global PVC industry. China has grown from a net PVC importer into a net PVC exporter. Especially since 2003 when China took anti-dumping actions against PVC imports, PVC made from calcium carbide has been developing rapidly in China. In 2006, China surpassed the U.S. in both the capacity and volume of PVC production, becoming the largest PVC producer in the world. As the Chinese economy develops and the urbanization rate increases, the demand for PVC will continue to expand in China from 2018 to 2022.

Topics Covered:

Supply of and demand for PVC in China

Major PVC producers in China

Market price of PVC in China

Competition on China's PVC market

Import of PVC in China

Major driving forces and market opportunities for China's PVC industry

Prospect of China's PVC industry from 2018 to 2022

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