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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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Contents

1 RELEVANT CONCEPTS OF PVC INDUSTRY

1.1 Definition and Classification of PVC
  1.1.1 Definition
  1.1.2 Classification
1.2 Parameters and Assumptions
  1.2.1 Assumptions
  1.2.2 Data Sources
  1.2.3 About CRI

2 ANALYSIS ON CHINA'S PVC INDUSTRY, 2013-2018

2.1 Development Environment of China's PVC Industry
  2.1.1 Economic Environment
  2.1.2 Policy Environment
  2.1.3 Social Environment
2.2 Analysis on Supply of PVC in China
  2.2.1 Production Capacity
  2.2.2 Production Volume
2.3 Analysis on Demand for PVC in China
  2.3.1 Major Consumers of PVC in China
  2.3.2 Market Size of PVC in China

3 COMPETITION IN CHINA'S PVC INDUSTRY, 2013-2018

3.1 Barriers to Entry in China's PVC Industry
  3.1.1 Brand Barriers
  3.1.2 Policy Barriers
  3.1.3 Technical Barriers
  3.1.4 Scale Barriers
3.2 Competition Structure of China's PVC Industry
  3.2.1 Bargaining Power of Raw Material Suppliers
  3.2.2 Bargaining Power of Consumers
  3.2.3 Internal Competition of PVC Industry
  3.2.4 Potential Entrants
  3.2.5 Substitutes

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4 MAJOR PVC PRODUCERS IN CHINA, 2017-2018

4.1 Shanghai Chlor-Alkali Chemical Co., Ltd.
4.1.1 Enterprise Profile
4.1.2 Operation
4.2 Xinjiang Tianye Co., Ltd.
4.2.1 Enterprise Profile
4.2.2 Operation
4.3 Yibin Tianyuan Group Co., Ltd.
4.4 Hangjin Technology Co., Ltd.
4.5 Hubei Yihua Chemical Industry Co., Ltd.
4.6 Sichuan Jinlu Group Co., Ltd.
4.7 Ningxia Younglight Chemicals Co., Ltd.
4.8 Xinjiang Zhongtai Chemical Co., Ltd.
4.9 Hongda Xingye Co., Ltd.
4.10 Inner Mongolia Junzheng Energy & Chemical Group Co., Ltd.

5 ANALYSIS ON PRODUCTION COSTS AND PRICES OF PVC IN CHINA, 2015-2018

5.1 Analysis on Production Costs of PVC in China
5.2 Analysis on PVC Prices in China

6 FORECAST ON DEVELOPMENT OF CHINA'S PVC INDUSTRY, 2018-2022

6.1 Factors Influencing Development of China's PVC Industry
6.1.1 Major Driving Forces and Market Opportunities
6.1.2 Threats and Challenges
6.2 Forecast on Supply of PVC in China
6.2.1 Forecast on Production Volume of SUVs in China, 2018-2022
6.2.2 Forecast on Structure of PVC Products
6.3 Forecast on Demand for Nickel in China

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Selected Charts

SELECTED CHARTS

Chart China's GDP and Disposable Income Per Capita, 2011-2021
Chart China's Industrial Value Added, 2012-2017
Chart Real Estate Development in China, 2013-2017
Chart Chinese Government's Policies on PVC Industry
Chart Production Volume of PVC in China, 2013-2017
Chart Apparent Consumption of PVC in China, 2013-2017
Chart Market Size of PVC in China, 2013-2017
Chart Import Volume of PVC in China, 2012-2017
Chart Export Volume of PVC in China, 2012-2017
Chart Profile of Shanghai Chlor-Alkali Chemical Co., Ltd.
Chart Shanghai Chlor-Alkali Chemical Co., Ltd.'s Revenue from PVC, 2013-2017
Chart Profile of Xinjiang Tianye Co., Ltd.
Chart Profile of Yibin Tianyuan Group Co., Ltd.
Chart Yibin Tianyuan Group Co., Ltd.'s Revenue from PVC, 2013-2017
Chart Profile of Hangjin Technology Co., Ltd.
Chart Hangjin Technology Co., Ltd.'s Revenue from PVC, 2013-2017
Chart Prices of Calcium Carbide in Northwest China, 2012-2018
Chart Spot Prices of International Crude Oil, 2013-2018
Chart PVC Prices in China, 2014-2018
Chart PVC Prices in Different Parts of China, 2014-2018
Chart Forecast on Production Volume of PVC in China, 2018-2022

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