

Research Report on China's PVC Industry, 2013-2017

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Abstracts

In the 1970's, the global PVC industrial structure changed greatly along with the development of Asia PVC industry. Especially after entering the 21st century, China PVC industry became increasingly influential in the global PVC industry. In recent years, China has become the largest country in PVC production capacity, PVC output volume and PVC consumption all over the world. Meanwhile, PVC industry boomed in China, which changes the global structures in production capacity, output volume and processing techniques. Calcium carbide method develops prosperously in China. As a result, ethylene method and calcium carbide method exists at the same time. Because of the deficient crude oil resources and the low cost of calcium carbide processing technique, calcium carbide processing technique become increasingly popular in the global PVC industry. However, its development is greatly restricted by its serious pollution and high energy consumption.

The PVC consumption regions are mainly located in Asia, North America, Europe and the Middle East. North America and Europe were the largest global PVC consumers in 2003-2005. After entering 2005, Asia became the largest global PVC consumer and producer. According to statistics, the global growth rate of PVC consumption declined from 6% to 4% during 2005 to 2010, however, the growth rate of PVC consumption increased 8%-10% in Asia, especially in China, in the same period. In recent years, the increase of global PVC consumption mainly concentrates in Asia and the Middle East where PVC industry develop rapidly and stably. However, growth rate of PVC consumption shows downward trend in the U.S. and Europe, which is closely related to their economy and PVC utilization rates

The reputation of China in global PVC industry changes constantly. After the PVC anti-dumping in 2003 and with the rapid development of calcium carbide method, China developed gradually from the pure PVC importer into the largest PVC producer whose PVC production capacity and PVC output volume exceeding that of the U.S. in 2006. In

2012, the output volume of PVC totaled 13.181 million tons in China, increasing by 1.77% YOY. According to the consumption structure of PVC downstream industries, building material consumption like pipes and section bars is still in the dominant position and real estate market will still be the main PVC demand source.

As an energy-intensive industry, the development of PVC industry is influenced by factors including energy price, raw material price, new constructed projects, project in construction, the combination development of chlor-alkali industry and petrochemical industry and environmental safety. In recent years, the development and distribution of PVC manufacturing enterprises concentrates in raw material regions and the production capacity gradually transfer towards the central and western regions. As a result, PVC production capacity booms in Inner Mongolia, Xinjiang, Shaanxi, Shanxi, Ningxia and Henan in recent years. Moreover, due to the "excessive coal, insufficient oil and lack gas" energy structure in China, PVC produced by calcium carbide method accounts for over 70% of the total PVC production capacity. Thanks to the abundant coal resources in some regions, calcium carbide industry, chlor-alkali industry and PVC industry become the local pillar industries.

In 2012, China imported 940,000 tons PVC, decreasing by 10.51% YOY; China exported 385,600 tons PVC, increasing by 4.9% YOY. From the third quarter of 2012, influenced by the increased international energy cost and the shortage of raw materials, the global PVC output volume declined. Meanwhile, influenced by the production halts of PVC devices of Malaysia Liquefied Natural Gas Corporation, the PVC supply in Southeast Asia suffered shortage in a short time. As a result, the export volume of PVC products increased in China.

With the constant improving of urbanization level and economy, it is predicted that the demand for PVC will keep increasing in China market during 2013 to 2017.

Through this report, the readers can acquire the following information:

China PVC Supply and Demand

China PVC Import and Export

Expansion Trend of China PVC Production Capacity

Major China PVC Manufacturing Enterprises and Their Operation Status

Forecast on Development of China PVC Industry

The Following Enterprises and People are Proposed to Purchase This Report:

PVC Manufacturing Enterprises

PVC Raw Material Manufacturing Enterprises and Downstream Enterprises

PVC Trade Enterprises

Research Institutes and Investors Concerned about PVC Market

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