

# **Bio-based Polyvinyl Chloride (PVC) Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Rigid, Flexible), By Application (Films and Sheets, Wires and Cables, Pipes and Fittings, Others), By Region and Competition**

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## **Abstracts**

Global Bio-based Polyvinyl Chloride (PVC) Market has valued at USD 627.13 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.01% through 2028. The rising appetite for sustainable and environmentally responsible materials across diverse sectors has emerged as a pivotal catalyst for the adoption of bio-based polyvinyl chloride (PVC). Conventional PVC, reliant on petroleum-derived raw materials, has encountered scrutiny due to its environmental repercussions, encompassing the emission of harmful chlorine gas during production and its protracted decomposition in landfills. Conversely, bio-based PVC is crafted from renewable sources, such as ethanol derived from biomass or plant-based plasticizers. This not only diminishes the carbon footprint but also contributes to reducing reliance on fossil fuels.

### **Key Market Drivers**

#### **Surging Demand for Bio-Based Polyvinyl Chloride (PVC) in Films and Sheets**

In an era of heightened environmental awareness, the demand for sustainable alternatives to traditional plastics has surged across various industries. One such eco-friendly option that has gained prominence is Bio-Based Polyvinyl Chloride (PVC). Among its numerous applications, the use of bio-based PVC in the production of films

and sheets has witnessed remarkable growth. The environmental imperative is one of the foremost drivers behind the growing demand for bio-based PVC in films and sheets. Traditional PVC production relies heavily on fossil fuels, contributing significantly to carbon emissions. Bio-based PVC, on the other hand, is derived from renewable feedstocks, such as sugarcane, corn, and soybeans. This shift towards renewable sourcing aligns with global sustainability goals, mitigating the carbon footprint of PVC production. With mounting concerns over climate change and plastic pollution, industries and consumers are seeking alternatives that reduce their ecological impact, making bio-based PVC an attractive choice.

Moreover, bio-based PVC's versatility is another compelling factor propelling its demand in films and sheets. The film and sheet industry spans a broad spectrum of applications, from packaging materials to construction and agriculture. Bio-based PVC can be tailored to suit a wide array of requirements, making it suitable for diverse applications. It can be manufactured in various thicknesses, colors, and textures, allowing it to replace traditional PVC in a multitude of roles. Whether used for food packaging, greenhouse films, or construction sheets, bio-based PVC offers a sustainable solution that meets the functional needs of these applications. Companies across industries are increasingly integrating sustainability initiatives into their operations. As part of this shift, many are actively seeking out environmentally friendly materials like bio-based PVC. Incorporating bio-based PVC films and sheets into their products allows these companies to demonstrate their commitment to sustainability, meet regulatory requirements, and appeal to environmentally conscious consumers. Sustainability is no longer just a buzzword; it has become a strategic business imperative, and bio-based PVC offers a tangible means of achieving sustainability goals.

Furthermore, governments and regulatory bodies worldwide are introducing policies and regulations to encourage the use of sustainable materials and reduce reliance on conventional plastics. These measures range from plastic bags and taxes to strict recycling and waste management rules. Bio-based PVC, being a sustainable alternative, aligns well with these regulatory changes. Companies operating in regions with stringent environmental regulations are more likely to adopt bio-based PVC films and sheets to remain compliant and avoid penalties. Consumer preferences are playing a pivotal role in driving the demand for bio-based PVC in films and sheets. Today's consumers are more informed and conscious of their choices, and they are increasingly favoring products that align with their values. Products packaged in bio-based PVC films are perceived as more eco-friendly and are thus preferred by environmentally conscious consumers. The rising demand for sustainable and ethical consumer products directly influences the adoption of bio-based PVC in packaging materials. Technological

advancements in the manufacturing processes of bio-based PVC have played a pivotal role in meeting the increasing demand for films and sheets. Innovations in extrusion, lamination, and coating technologies have made it easier to produce high-quality bio-based PVC films and sheets at competitive costs. These advancements have expanded the range of applications for bio-based PVC, making it an attractive choice for industries looking for efficient and sustainable solutions, leading to the demand of market in the forecast period.

### Increasing Demand of Bio-based Polyvinyl Chloride (PVC) in Wires and Cables

In the realm of sustainable materials, Bio-Based Polyvinyl Chloride (PVC) is emerging as a game-changer, particularly in the wires and cables industry. Traditional PVC, derived from fossil fuels, has long been the go-to material for insulation and sheathing in electrical applications. However, as environmental concerns intensify, the demand for more eco-friendly alternatives has surged. Bio-based PVC, sourced from renewable feedstocks like sugarcane or corn, is gaining traction due to its reduced environmental impact and versatile properties. The sustainability imperative stands out as a primary driver for the increasing demand for bio-based PVC in wires and cables. Traditional PVC production relies heavily on non-renewable fossil fuels, leading to significant carbon emissions and contributing to climate change. In contrast, bio-based PVC is derived from renewable feedstocks, aligning with global sustainability goals, and mitigating the carbon footprint associated with PVC production. In an era of heightened environmental awareness and stringent emission reduction targets, the electrical industry is under pressure to adopt eco-friendly materials, making bio-based PVC a compelling choice.

Moreover, the versatility of bio-based PVC is another key factor propelling its demand in wires and cables. The electrical industry encompasses a wide range of applications, from power distribution and telecommunications to automotive wiring. Bio-based PVC can be tailored to meet diverse technical requirements, making it a suitable material for various cable types and electrical applications. It boasts excellent insulation properties, resistance to electrical and thermal stress, and fire-retardant characteristics, which are crucial for ensuring the safety and performance of electrical systems.

Furthermore, consumer and industrial preferences are increasingly favoring sustainable products and materials. With the growing emphasis on environmental responsibility, both consumers and businesses are seeking products that align with their values. This shift in preferences has a direct impact on the electrical industry, as manufacturers and suppliers are pressured to use sustainable materials like bio-based PVC in their

products. As eco-consciousness continues to rise, the demand for bio-based PVC in wires and cables is set to increase. All these factors dominate the growth of Global Bio-based Polyvinyl Chloride (PVC) Market in the upcoming years.

### Growing Demand of Bio-based Polyvinyl Chloride (PVC) in Pipes and Fittings

The pipes and fittings sector is experiencing a paradigm shift in materials choice as sustainability takes center stage. Traditional Polyvinyl Chloride (PVC) has long been a staple in this industry, offering excellent durability and affordability. However, concerns about its environmental impact and the need for sustainable alternatives have led to the rapid rise in demand for Bio-Based PVC. Sourced from renewable materials like sugarcane, corn, or soybeans, bio-based PVC offers a greener solution without compromising on performance. The sustainability imperative is the driving force behind the growing demand for bio-based PVC in pipes and fittings. Conventional PVC production relies heavily on fossil fuels, contributing to greenhouse gas emissions and environmental degradation. In contrast, bio-based PVC is derived from renewable feedstocks, aligning perfectly with global sustainability goals. It reduces the carbon footprint associated with PVC production, offering an eco-friendlier option for the pipes and fittings sector. As environmental consciousness grows, industries are actively seeking materials that reduce their ecological impact, making bio-based PVC a compelling choice.

Moreover, bio-based PVC's versatility is a key factor propelling its demand in the pipes and fittings sector. This industry encompasses a wide array of applications, from water supply and drainage to irrigation and sewage systems. Bio-based PVC can be tailored to meet diverse technical requirements, making it a suitable material for various pipe and fitting types. It possesses excellent chemical resistance, long-term durability, and the necessary mechanical strength to withstand the demands of different applications. Its adaptability and performance make it an ideal choice for addressing the diverse needs of the pipes and fittings industry.. Thus, increasing demand of Bio-based Polyvinyl Chloride (PVC) led to the growth of the market.

### Key Market Challenges

#### Performance and Durability and Cost Competitiveness Poses a Significant Obstacle to Market Expansion

One of the primary challenges in the bio-based PVC market is achieving performance and durability comparable to traditional PVC. Traditional PVC is known for its excellent

mechanical properties, chemical resistance, and durability, making it a popular choice in various industries. Bio-based PVC, derived from renewable sources like sugarcane or corn, often faces limitations in these aspects.

Moreover, the cost of bio-based PVC production, compared to traditional PVC, remains a significant hurdle. Traditional PVC benefits from decades of efficient production processes and economies of scale, which result in lower costs. In contrast, bio-based PVC production often requires more intricate processes and sustainable sourcing, increasing its production expenses.

### Feedstock Availability and Reliability and Regulatory Compliance

The availability and reliability of sustainable feedstocks for bio-based PVC production can be inconsistent. Factors like weather conditions, crop yields, and competition for agricultural resources can impact the supply chain, leading to uncertainties in production.

Moreover, meeting stringent environmental regulations and certifications can be challenging for bio-based PVC. While the material is designed to be more sustainable, it must adhere to various standards and regulations to prove its eco-friendly claims.

In addition, market acceptance is a significant challenge, particularly when bio-based PVC requires changes in manufacturing processes or consumer behavior. Convincing industries to transition from traditional PVC to bio-based PVC can be challenging due to the perceived risks and uncertainties associated with adopting a relatively new material.

### Key Market Trends

#### Increasing Demand for Sustainable Materials

One of the most significant trends in the bio-based PVC market is the growing demand for sustainable materials across various industries. Businesses and consumers are increasingly aware of the environmental impact of their choices and are seeking alternatives to traditional plastics. Bio-based PVC, with its reduced carbon footprint and renewable sourcing, is becoming an attractive option for companies looking to meet sustainability goals and reduce their environmental footprint.

Moreover, innovation in bio-based PVC extends beyond just its sourcing. Researchers and manufacturers are working on making bio-PVC biodegradable and recyclable.

Biodegradable bio-PVC has the potential to reduce plastic waste in landfills and oceans, addressing one of the most pressing environmental issues. Additionally, the development of recyclable bio-PVC materials can help create a circular economy, reducing the need for virgin materials and minimizing waste.

### Advancements in Feedstock Sourcing

The source of raw materials is a crucial aspect of bio-based PVC production. To ensure sustainability and minimize competition with food crops, the industry is focusing on using non-food, waste, or byproduct feedstocks. For example, the utilization of agricultural residues, wood waste, and non-food crops like switchgrass and jute can help reduce the environmental impact of bio-based PVC production.

Furthermore, bio-based PVC found applications primarily in industries such as automotive and packaging. However, as technology matures and performance improves, its usage is expanding into new areas. These include the construction sector, where bio-based PVC can be used in pipes, profiles, and cables, as well as in the medical field for disposable equipment.

### Enhanced Performance Characteristics

Early iterations of bio-based PVC often faced challenges in terms of performance compared to traditional PVC. However, significant progress has been made in recent years. Manufacturers are investing in research and development to improve the mechanical, thermal, and chemical properties of bio-based PVC. This includes efforts to enhance its heat resistance, durability, and overall performance, making it a more viable option for a wider range of applications.

Moreover, government regulations and incentives play a pivotal role in the adoption of bio-based PVC. Many countries and regions are implementing stricter regulations on the use of traditional plastics and encouraging the use of sustainable alternatives. This includes tax incentives, subsidies, and regulations that promote the use of bio-based materials. As governments worldwide intensify their focus on sustainability, the bio-based PVC market is likely to benefit from these policies.

### Segmental Insights

### Product Insights

Based on the category of product insights, rigid emerged as the dominant player in the global market for Bio-based Polyvinyl Chloride (PVC) in 2022. Bio-Based Polyvinyl Chloride (PVC) in its rigid product form offers a multitude of benefits that make it an attractive choice across various industries. Firstly, its environmental advantages are paramount; derived from renewable feedstocks like sugarcane, corn, and soybeans, bio-based PVC significantly reduces the carbon footprint compared to traditional PVC, making it a sustainable alternative. Furthermore, it possesses excellent mechanical strength, durability, and chemical resistance, making it suitable for a wide range of applications, including construction, automotive, and electrical industries. Its fire-retardant properties add to its safety credentials. Bio-based PVC also aligns with regulatory standards by avoiding hazardous additives, such as phthalates and heavy metals, ensuring compliance with stringent environmental regulations. As consumer and industrial preferences shift towards sustainable materials, bio-based PVC in its rigid form stands as a versatile, eco-friendly, and technologically competitive solution that contributes to a greener and more responsible future.

### Application Insights

Based on the category of application, pipe & fittings emerged as the dominant player in the global market for Bio-based Polyvinyl Chloride (PVC) in 2022. Bio-Based Polyvinyl Chloride (PVC) has become an increasingly favored choice in the pipe and fittings industry due to the multitude of benefits it offers. Firstly, its sustainability merits are noteworthy; sourced from renewable feedstocks like sugarcane and corn, bio-based PVC significantly reduces the environmental impact compared to conventional PVC, contributing to a greener, more sustainable future. Its superior chemical and corrosion resistance make it an excellent choice for pipes and fittings, ensuring longevity and minimal maintenance in various applications, including water distribution, drainage systems, and industrial piping. Bio-based PVC's robustness and durability enable it to withstand a wide range of environmental conditions, making it ideal for both above-ground and buried installations. Moreover, its compliance with stringent environmental regulations, as it lacks harmful additives like phthalates and heavy metals, assures users of a safe and eco-friendly material. As the world embraces sustainable practices, Bio-Based PVC stands as a versatile, eco-conscious, and technically adept solution for pipes and fittings, contributing to reduced environmental impact and enhanced performance in diverse applications.

### Regional Insights

Asia Pacific emerged as the dominant player in the global Bio-based Polyvinyl Chloride

(PVC) market in 2022. The Asia Pacific region is witnessing a substantial surge in the demand for Bio-Based Polyvinyl Chloride (PVC), driven by a confluence of factors. Firstly, the growing awareness of environmental issues and sustainability is pushing industries and governments to seek eco-friendly alternatives to conventional materials. Bio-Based PVC, derived from renewable sources, aligns perfectly with this agenda, as it offers a significantly reduced carbon footprint compared to its fossil fuel-based counterpart. Secondly, the region's rapid urbanization and infrastructural development have led to increased requirements for construction materials, including pipes, fittings, cables, and more, all of which can benefit from the eco-friendly and versatile nature of bio-based PVC. Furthermore, the automotive industry in the Asia Pacific is witnessing a transformation towards electric vehicles, which demand high-performance, sustainable materials in their construction, opening up another avenue for the adoption of bio-based PVC. Regulatory support and incentives for sustainable materials across countries like China, India, and Japan further bolster the demand. As industries and consumers in the Asia Pacific prioritize sustainability and environmental responsibility, the demand for Bio-Based PVC is poised to continue its upward trajectory, promising a more eco-conscious and sustainable future for the region.

### Key Market Players

BioPlastic Solutions, LLC

Ineos Group Limited

BASF SE

Mitsubishi Chemical Corporation

LG Chem Ltd.

Teknor Apex Company, Inc.

Vynova Group

Sylvin Technologies, Inc.

Neste Oyj

Evonik Industries AG



## Report Scope:

In this report, the Global Bio-based Polyvinyl Chloride (PVC) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Bio-based Polyvinyl Chloride (PVC) Market, By Product:

Films and Sheets

Wires and Cables

Pipes and Fittings

Others

### Bio-based Polyvinyl Chloride (PVC) Market, By Application:

Films and Sheets

Wires and Cables

Pipes and Fittings

Others

### Bio-based Polyvinyl Chloride (PVC) Market, By Region:

Asia-Pacific

China

India

Australia

Japan

South Korea

Europe

France

Germany

Spain

Italy

United Kingdom

North America

United States

Mexico

Canada

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Bio-based Polyvinyl Chloride (PVC) Market.

## Available Customizations:

Global Bio-based Polyvinyl Chloride (PVC) Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Applications
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. IMPACT OF COVID-19 ON GLOBAL BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET**

### **5. VOICE OF CUSTOMER**

### **6. GLOBAL BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value & Volume

## 6.2. Market Share & Forecast

6.2.1. By Product (Rigid, Flexible)

6.2.2. By Application (Films and Sheets, Wires and Cables, Pipes and Fittings, Others)

6.2.3. By Region

6.2.4. By Company (2022)

## 6.3. Product Market Map

# 7. ASIA PACIFIC BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET OUTLOOK

## 7.1. Market Size & Forecast

7.1.1. By Value & Volume

## 7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Application

7.2.3. By Country

## 7.3. Asia Pacific: Country Analysis

7.3.1. China Bio-based Polyvinyl Chloride (PVC) Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value & Volume

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By Application

7.3.2. India Bio-based Polyvinyl Chloride (PVC) Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value & Volume

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By Application

7.3.3. Australia Bio-based Polyvinyl Chloride (PVC) Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value & Volume

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product

7.3.3.2.2. By Application

7.3.4. Japan Bio-based Polyvinyl Chloride (PVC) Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value & Volume

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Product

- 7.3.4.2.2. By Application
- 7.3.5. South Korea Bio-based Polyvinyl Chloride (PVC) Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value & Volume
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Product
    - 7.3.5.2.2. By Application

## **8. EUROPE BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value & Volume
- 8.2. Market Share & Forecast
  - 8.2.1. By Product
  - 8.2.2. By Application
  - 8.2.3. By Country
- 8.3. Europe: Country Analysis
  - 8.3.1. France Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value & Volume
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Product
      - 8.3.1.2.2. By Application
  - 8.3.2. Germany Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value & Volume
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Product
      - 8.3.2.2.2. By Application
  - 8.3.3. Spain Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value & Volume
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Product
      - 8.3.3.2.2. By Application
  - 8.3.4. Italy Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value & Volume
    - 8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Product
- 8.3.4.2.2. By Application
- 8.3.5. United Kingdom Bio-based Polyvinyl Chloride (PVC) Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value & Volume
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Product
    - 8.3.5.2.2. By Application

## **9. NORTH AMERICA BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value & Volume
- 9.2. Market Share & Forecast
  - 9.2.1. By Product
  - 9.2.2. By Application
  - 9.2.3. By Country
- 9.3. North America: Country Analysis
  - 9.3.1. United States Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value & Volume
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Product
      - 9.3.1.2.2. By Application
  - 9.3.2. Mexico Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value & Volume
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Product
      - 9.3.2.2.2. By Application
  - 9.3.3. Canada Bio-based Polyvinyl Chloride (PVC) Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value & Volume
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Product
      - 9.3.3.2.2. By Application

## **10. SOUTH AMERICA BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET**

## OUTLOOK

### 10.1. Market Size & Forecast

#### 10.1.1. By Value & Volume

### 10.2. Market Share & Forecast

#### 10.2.1. By Product

#### 10.2.2. By Application

#### 10.2.3. By Country

### 10.3. South America: Country Analysis

#### 10.3.1. Brazil Bio-based Polyvinyl Chloride (PVC) Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value & Volume

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Product

###### 10.3.1.2.2. By Application

#### 10.3.2. Argentina Bio-based Polyvinyl Chloride (PVC) Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value & Volume

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Product

###### 10.3.2.2.2. By Application

#### 10.3.3. Colombia Bio-based Polyvinyl Chloride (PVC) Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value & Volume

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Product

###### 10.3.3.2.2. By Application

## 11. MIDDLE EAST AND AFRICA BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET OUTLOOK

### 11.1. Market Size & Forecast

#### 11.1.1. By Value & Volume

### 11.2. Market Share & Forecast

#### 11.2.1. By Product

#### 11.2.2. By Application

#### 11.2.3. By Country

### 11.3. MEA: Country Analysis

#### 11.3.1. South Africa Bio-based Polyvinyl Chloride (PVC) Market Outlook



- 11.3.1.1. Market Size & Forecast
  - 11.3.1.1.1. By Value & Volume
- 11.3.1.2. Market Share & Forecast
  - 11.3.1.2.1. By Product
  - 11.3.1.2.2. By Application
- 11.3.2. Saudi Arabia Bio-based Polyvinyl Chloride (PVC) Market Outlook
  - 11.3.2.1. Market Size & Forecast
    - 11.3.2.1.1. By Value & Volume
  - 11.3.2.2. Market Share & Forecast
    - 11.3.2.2.1. By Product
    - 11.3.2.2.2. By Application
- 11.3.3. UAE Bio-based Polyvinyl Chloride (PVC) Market Outlook
  - 11.3.3.1. Market Size & Forecast
    - 11.3.3.1.1. By Value & Volume
  - 11.3.3.2. Market Share & Forecast
    - 11.3.3.2.1. By Product
    - 11.3.3.2.2. By Application

## **12. MARKET DYNAMICS**

- 12.1. Drivers
- 12.2. Challenges

## **13. MARKET TRENDS & DEVELOPMENTS**

## **14. GLOBAL BIO-BASED POLYVINYL CHLORIDE (PVC) MARKET: SWOT ANALYSIS**

## **15. PORTER'S FIVE FORCES ANALYSIS**

- 15.1. Competition in the Industry
- 15.2. Potential of New Entrants
- 15.3. Power of Suppliers
- 15.4. Power of Customers
- 15.5. Threat of Substitute Product

## **16. COMPETITIVE LANDSCAPE**

- 16.1. BioPlastic Solutions, LLC
  - 16.1.1. Business Overview
  - 16.1.2. Form Offerings
  - 16.1.3. Recent Developments
  - 16.1.4. Financials (In Case of Listed Companies)
  - 16.1.5. Key Personnel
- 16.2. Ineos Group Limited
  - 16.2.1. Business Overview
  - 16.2.2. Form Offerings
  - 16.2.3. Recent Developments
  - 16.2.4. Financials (In Case of Listed Companies)
  - 16.2.5. Key Personnel
- 16.3. BASF SE
  - 16.3.1. Business Overview
  - 16.3.2. Form Offerings
  - 16.3.3. Recent Developments
  - 16.3.4. Financials (In Case of Listed Companies)
  - 16.3.5. Key Personnel
- 16.4. Mitsubishi Chemical Corporation
  - 16.4.1. Business Overview
  - 16.4.2. Form Offerings
  - 16.4.3. Recent Developments
  - 16.4.4. Financials (In Case of Listed Companies)
  - 16.4.5. Key Personnel
- 16.5. LG Chem Ltd.
  - 16.5.1. Business Overview
  - 16.5.2. Form Offerings
  - 16.5.3. Recent Developments
  - 16.5.4. Financials (In Case of Listed Companies)
  - 16.5.5. Key Personnel
- 16.6. Teknor Apex Company, Inc.
  - 16.6.1. Business Overview
  - 16.6.2. Form Offerings
  - 16.6.3. Recent Developments
  - 16.6.4. Financials (In Case of Listed Companies)
  - 16.6.5. Key Personnel
- 16.7. Vynova Group
  - 16.7.1. Business Overview

- 16.7.2. Form Offerings
- 16.7.3. Recent Developments
- 16.7.4. Financials (In Case of Listed Companies)
- 16.7.5. Key Personnel
- 16.8. Sylvin Technologies, Inc.
  - 16.8.1. Business Overview
  - 16.8.2. Form Offerings
  - 16.8.3. Recent Developments
  - 16.8.4. Financials (In Case of Listed Companies)
  - 16.8.5. Key Personnel
- 16.9. Neste Oyj
  - 16.9.1. Business Overview
  - 16.9.2. Form Offerings
  - 16.9.3. Recent Developments
  - 16.9.4. Financials (In Case of Listed Companies)
  - 16.9.5. Key Personnel
- 16.10. Evonik Industries AG
  - 16.10.1. Business Overview
  - 16.10.2. Form Offerings
  - 16.10.3. Recent Developments
  - 16.10.4. Financials (In Case of Listed Companies)
  - 16.10.5. Key Personnel

## **17. STRATEGIC RECOMMENDATIONS**

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