

Vietnam Plastic resin and Synthetic rubber Comprehensive Report Q3/2016

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Abstracts

Plastic resin and synthetic rubber are important input materials for many industries as it provides intermediate goods and added values for other industries, especially plastics and automobile industry. The inputs for Plastic resin and synthetic rubber (so called polymer, plastic) are products from oil industry, specifically naphtha from oil refineries or propane, ethane from processing factories, processing gas from crude oil and gas cracking.

In 2014, the total Plastic resin production was about 311 million tons with the average growth rate of 4.5% from 2010-2014. China is the biggest plastics materials producer in the world (26%), followed by Europe (20%) while Vietnam only takes up to 0.3% of production

In Vietnam, the refining and petrochemistry just started to develop and Dung Quat Refinery is the only operating one in the whole country. In addition, there are 2 joint-venture PVC factories (Vinachem- TPC Vina (Thailand) and Petrovietnam-Petronas), 1 DOP factory (Petrovietnam, Vinachem and LG), which is the support product for using PVC commonly used in building & construction. Total domestic production only met about 20% of domestic demand; hence the rest needs to be imported. Vietnam is one of the world's largest plastic bag producers thanks to competitive advantage in low labor costs. In Vietnamese plastic industry's structure, plastic packaging contributes the biggest proportion (36%), also it currently is sub-sector having the most noticeable export turnover (about 60%). The export turnover of plastic bags continuously rises with average pace of around 20%/year during recent years. By now, the majority of import tax of raw materials is 0%. Vietnam is one of few countries in Southeast Asia don't levy import tax on polymers. Other nations also doing the same are Cambodia, Myanmar and Singapore, though these countries don't hold such a large plastic industry as

Vietnam. According to Vietnam Industry Research and Consultant (VIRAC), Korea continues to be the primary import market of Vietnam with the value is worth 125 million USD, decreasing slightly yoy (130 million USD, making the share of imports fall (from 32% to 30%). Coming second is Japan with import value stands at 85 million USD, seizing 20.7% of total import value. Other markets take up the insignificant proportion.

The in-depth research “Vietnam Plastic Resin and Synthetic Rubber industry report Q2/2016” carried out by Vietnam Industry Research and Consultant (VIRAC) illustrates the overall scenario of the Plastic Resin and Synthetic Rubber industry in Vietnam in order to provide an insight for a better understanding regarding the market. The report details the economic situation in general and the industry in particular with updated date and statistic until 2016, the movement of the price as well as the forecast for the upcoming future, covering all domains, including thermoplastics, elastomers, thermoset plastics. Analysis of big players in the industry is also elaborated by providing detailed financial analysis, applied technology, market share, etc herein to help companies position and define the competitiveness in the market. For example, some typical producers are Hung Nghiep Formosa Company Limited (Taiwan), Petrolimex International Trading Joint Stock Company, Da Nang Chemicals and Plastic Joint Stock Company, Vietnam Plastic Corporation, An Loc Phat International JSC, Hiep Phat Hung Services Trading Company Limited, Opec Plastics Joint Stock Company (Opec Plastics), Da Nang Chemicals and Plastic Joint Stock Company, Nguyen Phat Trading Production Company Limited, Tin Phu Trading and Services Company Limited.

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