

Polyvinyl Butyral (PVB) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Polyvinyl Butyral Market is expected to register a CAGR of greater than 6% during the forecast period.

The market was negatively impacted by COVID-19. Given the pandemic situation, car manufacturing plants were temporarily halted to prevent the spread, limiting demand for PVB materials used to manufacture safe, impact-resistant automotive windscreens. However, the industry has picked up speed since 2021, and the market is expected to follow a similar trajectory throughout the projection period as well.

Key Highlights

- Over the short term, the growing number of laminated glass applications and the ever-increasing construction and infrastructure activities across the world are likely to boost market growth.
- On the flip side, the availability of product substitutes in the market is expected to hinder the market's growth. The high amount of polyvinyl butyral recycling in developed economies could also hurt the market because it would cause environmental problems.
- In the coming years, the market is likely to grow thanks to growing demand from the photovoltaic industry and more people buying electric cars.
- During the period of the forecast, the Asia-Pacific region is expected to lead and have the highest CAGR.

Polyvinyl Butyral (PVB) Market Trends

The Automotive Segment to Dominate the Market

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- Polyvinyl butyral is a polymer with good mechanical properties that are commonly used as an interlayer material in laminated glass. The PVB sheet adheres to both layers of glass, keeping them unbroken even after impact. Because the bond between the PVB sheet and the glass is chemical, it does not delaminate easily.
- PVB is mostly found in laminated safety glass for car windshields. Because of the safety and security it provides in automotive windscreens, the demand for PVB as an interlayer in sandwich laminated glass has skyrocketed. Furthermore, acoustic insulation and UV protection are important advantages of PVB that increase its use in the automotive industry.
- The Organization Internationale des Constructeurs d'Automobiles (OICA) predicts that 80 million vehicles will be made around the world in 2021, which is about 3% more than the 78 million vehicles that will be made in 2020.
- Toyota, a renowned automobile company, increased vehicle sales and manufacturing by around 4% in November 2022 compared to the previous year. Toyota's total vehicle sales and production from January to November 2022 were around 9.5 million and 9.7 million, respectively. Even though sales didn't change much from the year before, production did go up by about 7% compared to the year before.
- The European Automobile Manufacturers' Association stated in its latest report that a total of 194 automobile manufacturing units operate on European Union soil. Also, a total of about 12 million vehicles will be made in Europe in 2021.
- The ACEA also saw an increase in passenger automobile registrations in December 2022, which grew by roughly 13% month over month compared to December 2021. Germany gained the highest percentage of registrations (+38%), followed by Italy (+21.0%). With the increased registration of passenger vehicles, demand for production is also increasing in the industry, significantly impacting the PVB market.
- So, the above factors are likely to keep the polyvinyl butyral market going in the years to come.

The Asia-Pacific Region to Dominate the Market

- Asia-Pacific is expected to be the biggest market in the world because China, India, Japan, and Singapore are building more buildings and selling and making more cars, and because investments are being made in the region to help solar energy production.
- According to the China Association of Automobile Manufacturers, China has also seen an increase in automotive production in the country of around 2.1% in the year 2022, compared to the previous year. About 26.86 million units of automobiles were sold in the United States in 2014. China has also seen an increase in automotive production in the country of around 2.1% in the year 2022, compared to the previous year. About 26.86 million units of automobiles were sold in 2022, as compared to 26.27 million units sold in 2021.
- According to the Indian Brand Equity Foundation, the Indian automotive industry is expected to reach around USD 300 billion by 2026. Moreover, in FY 2022, passenger vehicle sales in the country reached about 3 million.
- Between April 2000 and June 2022, the automobile industry received approximately USD 33.53 billion in cumulative equity FDI inflows. The Indian government thought that between USD 8 billion and USD 10 billion more would be invested in the car business from India and other countries by 2023.
- The Japanese construction industry is also expected to bloom due to the events expected to be hosted in the country. For instance, Osaka will host the World Expo in 2025. The construction is mostly driven by redevelopment and recovery from natural disasters. Two high-rise towers for Tokyo Stations, a 37-story, 230-meter-tall office tower initially planned to be completed in 2021, and a 61-story, 390-meter-tall office tower, are due for completion in 2027.
- According to Japan's Ministry of Land, Infrastructure, Transport, and Tourism (MLIT), total investment in the construction sector in 2022 is expected to be around 66,990 billion yen (USD 508.16 billion), which is a 0.6% increase over the previous year.
- Growing investments in the auto, construction, and other industries would lead to a rise in demand for polyvinyl butyral (PVB) because it serves those industries. This would be good for the market over the next few years.

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Polyvinyl Butyral (PVB) Industry Overview

The polyvinyl butyral (PVB) market is partially consolidated, with a few major players dominating a significant portion of the market. Some of the key players in the market include (in no particular order): Eastman Chemical Company, Kuraray Co. Ltd., Sekisui Chemical Co. Ltd., Kingboard (Fogang) Specialty Resins Co. Ltd. (KB PVB), and Chang Chun Group.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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