

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

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Polyvinyl Chloride (PVC) Market Analysis

The Polyvinyl Chloride Market size is estimated at 53.82 Million tons in 2025, and is expected to reach 65.48 Million tons by 2030, at a CAGR of 4% during the forecast period (2025-2030). This expansion reflects PVC's entrenched role in water infrastructure, healthcare disposables, and new-generation electric vehicles, even as regulations tighten around traditional additives. Sustained demand arises from a favorable performance-to-price ratio, especially in fast-urbanizing regions where substitutes cannot yet match PVC's durability, chemical resistance, or ease of processing. Large-diameter pipes for stormwater and potable-water grids, phthalate-free medical tubing, and lightweight automotive interiors all reinforce the growth trajectory of the polyvinyl chloride market. Meanwhile, producer margins face mixed pressures: Chinese overcapacity weighs on global prices, but vertical integration into chlor-alkali and recycling operations helps offset feedstock and compliance costs for leading firms.

Global Polyvinyl Chloride (PVC) Market Trends and Insights

Rapid Urban Infrastructure Expansion in SPAC-Financed Megacities

Continued spending on flood management and potable-water grids in Asia's megacities drives specification of large-diameter PVC pipes exceeding 2m, a departure from legacy residential bore sizes. Projects in India and Indonesia illustrate how acoustic leak-detection technology embedded in PVC piping allows utilities to address non-revenue water losses while extending asset life. Governments also link climate-resilience funding to materials with long service lives, which favors PVC over ductile iron or

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

concrete. As a result, premium grades capable of handling higher pressures and aggressive soil conditions obtain stronger margins than commodity pipe. Similar infrastructure commitments across Gulf Cooperation Council states suggest spill-over demand into the Middle East over the next decade.

Surge in Single-Use Medical Devices Favoring DEHP-Free PVC Compounds

California's impending DEHP ban in 2030 prompted North American converters to adopt DOTP-plasticized PVC as the default choice for blood bags, IV sets, and peritoneal-dialysis tubing. Teknor Apex, for instance, commercialized low-extractable APEX medical compounds that match flexibility targets without reproductive-toxicity concerns. Simultaneously, EU postponement of its own DEHP prohibition until mid-2030 offers first-mover advantage to suppliers that have already re-qualified with phthalate-free formulations. Higher compliance costs are readily absorbed by hospital procurement budgets, rounding out a premium niche that shields specialty PVC grades from commodity cycles.

Accelerating Bans on Lead-Based Stabilizers under EU REACH and Indian BIS

EU Regulation 923/2023 limits total lead content in PVC articles to 0.1 wt% starting January 2026. The same threshold is being replicated by India's Bureau of Indian Standards. Re-formulation to calcium-zinc stabilizers, while environmentally favorable, reduces processing windows and can lower dielectric strength-posing particular issues for wire and cable grades. Companies with patented synergistic additive packages secure a pricing premium, yet smaller extruders lacking R&D scale face qualification delays. Cost pass-through remains challenging in price-sensitive markets, compressing margins and encouraging consolidation.

Other drivers and restraints analyzed in the detailed report include:

Rising Demand for Clean-Water Infrastructure / OEM Shift Toward Lightweight Flexible PVC Interiors in Electric Vehicles / Brand-Owner Push for Phthalate-Free Packaging Diminishing Conventional Flexible PVC Demand /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Rigid PVC accounted for 62% of polyvinyl chloride market share in 2024, anchored by construction profiles, window frames, and infrastructure pipe. Volume leadership rests on standardized tooling, wide raw-material availability, and cost-efficient mass production. However, CPVC-while representing a single-digit share-shows the strongest 4.80% CAGR to 2030 thanks to superior temperature tolerance for hot-and-cold potable systems in hotels, hospitals, and data centers. CPVC's performance premium permits double-digit price differentials that cushion producers from commodity swings in the polyvinyl chloride market. Flexible PVC continues to serve medical bags, vehicle interiors, and consumer hoses; advances in DOTP and citrate plasticizers resolve regulatory scrutiny, retaining these applications. Low-smoke zero-halogen PVC variants further unlock growth in metro-rail and public-venue cabling where fire-safety codes tighten.

A notable spill-over effect involves CPVC blends that deliver incremental heat resistance in pipe-in-pipe installations without the full cost of neat CPVC. Producers exploit these hybrids to extend product portfolios and capture projects beyond standard temperature thresholds. Meanwhile, rigid PVC suppliers counter CPVC's rise by marketing co-extruded pipes with foam cores or impact-modified skins that reduce weight and resin consumption. These innovations collectively sustain competition across the polyvinyl chloride market even as specialized niches attract premium pricing.

Suspension polymerization delivered 75% of 2024 volume, reflecting unmatched economies of scale and broad compatibility with additives. Most construction-grade resins stem from suspension lines exceeding 300 kt/yr, enabling cost leadership across the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

polyvinyl chloride market. Yet emulsion PVC, while holding a modest base, is forecast for a 4.61% CAGR driven by its fine-particle morphology which supports high-definition calendared films and medical-grade tubing. Emulsion plants are inherently smaller and more flexible, allowing rapid grade switches toward higher-margin niches such as transparent blood-collection film or synthetic leather for EV interiors.

Suppliers use process versatility as a differentiation lever. Integrated producers operate both suspension and emulsion assets, bundling supply contracts and technical services to lock in converters shifting between commodity and specialty applications. Bulk polymerization, although limited, serves ultra-high-purity segments like semiconductor clean-room paneling where extractables must be minimized. As regulatory and end-user demands become more exacting, process diversification protects revenue streams and tempers price volatility in the polyvinyl chloride market.

The Polyvinyl Chloride Market Report Segments the Industry by Product Type (Rigid PVC, Flexible PVC, and More), Manufacturing Process (Suspension PVC, Emulsion PVC, and More), Stabilizer Type (Calcium-Based Stabilizers, Lead-Based Stabilizers, and More), Application (Pipes and Fittings, Bottles, and More), End-User Industry (Building and Construction, Packaging, and More), and Geography (Asia-Pacific, North America, and More).

Geography Analysis

Asia-Pacific preserved a commanding 60% share of the polyvinyl chloride market in 2024 and is forecasting a 4.38% CAGR to 2030. China's decision to raise PVC import tariffs to 5.5% underscores a policy focus on utilizing its 30 million t/yr domestic nameplate capacity while encouraging technological upgrades in suspension and paste lines. India's Jal Jeevan Mission funnels record capital into rural drinking-water networks, supporting large-bore PVC pipe demand alongside leak-detection infrastructure. Thailand's feedstock diversification, enabled by US ethane imports from 2029, secures cost competitiveness for Southeast Asian converters. In parallel, regional producers invest in vinyl recycling plants that create certified post-consumer resin for export-compliant building products.

North America balances infrastructure-renewal spending with rising EV assembly investments. Shin-Etsu's USD 1.25 billion Louisiana debottlenecking project and Formosa's Baton Rouge expansion add over 800 kt/yr of new suspension capacity between 2025 and 2027. Environmental permitting remains strict, compelling operators to integrate brine mining and vinyl chloride monomer emissions-reduction technology. As state regulations phase out DEHP, US compounders expedite phthalate-free offerings, thereby raising value per tonne and cushioning the cyclical construction market.

Europe endures the world's most stringent additive rules, driving capital toward calcium-zinc stabilizer production while accelerating R&D on recyclable mono-material profiles. VinylPlus exceeded its 2025 voluntary recycling target five years early, lifting the region's recycled-content rate in PVC profiles above 20%. Meanwhile, regional producers operate at reduced run-rates when power prices spike, exporting PVC from US Gulf Coast plants to backfill European contract commitments. Beyond OECD markets, South America and Africa seek polymer self-sufficiency; Brazil's sugar-cane-based ethylene project signifies a differentiated low-carbon route to PVC, while Nigeria evaluates chlor-alkali investments to reduce import reliance. Political and currency volatility remains a hurdle, yet infrastructure deficits present an undeniable addressable need for the polyvinyl chloride market.

List of Companies Covered in this Report:

Aditya Birla Chemicals / China National Bluestar (Group) Co.,Ltd. / Ercros, S.A. / Formosa Plastics Corporation / Hanwha Solutions / INEOS / Inner Mongolia Junzheng Energy & Chemical Group Co., Ltd. / Kem One SAS / LG Chem / Occidental Petroleum Corporation / Orbia / Reliance Industries Limited / SABIC / Shaanxi Coal & Chemical Industry Group Co., Ltd. / Shin-Etsu Chemical Co., Ltd. / Tianye Group / Westlake Corporation / Xinjiang Zhongtai Chemical Co., Ltd. /

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Additional Benefits:

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

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rapid Urban Infrastructure Expansion in SPAC-Driven Megacities across Asia

4.2.2 Surge in Single-Use Medical Devices Favoring DEHP-Free PVC Compounds in North America and Europe

4.2.3 Rising Demand for Clean Water Infrastructure:

4.2.4 OEM Shift Toward Lightweight Flexible PVC Interiors in Electric Vehicles Produced

4.2.5 Chlor-Alkali Capacity Integration by Producers in the US and EU Lowering PVC Production Costs

4.3 Market Restraints

4.3.1 Accelerating Bans on Lead-Based Stabilizers under EU REACH and Indian BIS Standards

4.3.2 Brand-Owner Push for Phthalate-Free Packaging Diminishing Conventional Flexible PVC Demand

4.3.3 Ethylene Price Volatility Linked to Crude-Oil Fluctuations Compressing Margins

4.4 Value Chain Analysis

4.5 Regulatory Outlook

4.6 Porter's Five Forces

4.6.1 Bargaining Power of Suppliers

4.6.2 Bargaining Power of Buyers

4.6.3 Threat of New Entrants

4.6.4 Threat of Substitutes

4.6.5 Competitive Rivalry

5 Market Size and Growth Forecasts (Volume)

5.1 By Product Type

5.1.1 Rigid PVC

5.1.1.1 Clear Rigid PVC

5.1.1.2 Non-clear Rigid PVC

5.1.2 Flexible PVC

5.1.2.1 Clear Flexible PVC

5.1.2.2 Non-clear Flexible PVC

5.1.3 Low-Smoke PVC

5.1.4 Chlorinated PVC (CPVC)

5.2 By Manufacturing Process

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2.1 Suspension PVC
- 5.2.2 Emulsion PVC
- 5.2.3 Bulk/Mass Polymerized PVC
- 5.3 By Stabilizer Type
 - 5.3.1 Calcium-based Stabilizers (Ca-Zn Stabilizers)
 - 5.3.2 Lead-based Stabilizers (Pb Stabilizers)
 - 5.3.3 Tin and Organotin-based (Sn Stabilizers)
 - 5.3.4 Barium-based and Other Stabilizer Types (Liquid Mixed Metals)
- 5.4 By Application
 - 5.4.1 Pipes and Fittings
 - 5.4.2 Films and Sheets
 - 5.4.3 Wires and Cables
 - 5.4.4 Bottles
 - 5.4.5 Profiles, Hoses and Tubings
 - 5.4.6 Other Applications
- 5.5 By End-User Industry
 - 5.5.1 Building and Construction
 - 5.5.2 Automotive and Transportation
 - 5.5.3 Electrical and Electronics
 - 5.5.4 Packaging
 - 5.5.5 Footwear
 - 5.5.6 Healthcare
 - 5.5.7 Other End-User Industries
- 5.6 By Geography
 - 5.6.1 Asia-Pacific
 - 5.6.1.1 China
 - 5.6.1.2 India
 - 5.6.1.3 Japan
 - 5.6.1.4 South Korea
 - 5.6.1.5 Rest of Asia-Pacific
 - 5.6.2 North America
 - 5.6.2.1 United States
 - 5.6.2.2 Canada
 - 5.6.2.3 Mexico
 - 5.6.3 Europe
 - 5.6.3.1 Germany
 - 5.6.3.2 United Kingdom
 - 5.6.3.3 Italy
 - 5.6.3.4 France
 - 5.6.3.5 Spain
 - 5.6.3.6 Rest of Europe
 - 5.6.4 South America
 - 5.6.4.1 Brazil
 - 5.6.4.2 Argentina
 - 5.6.4.3 Rest of South America
 - 5.6.5 Middle East and Africa
 - 5.6.5.1 Saudi Arabia

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.6.5.2 South Africa

5.6.5.3 Nigeria

5.6.5.4 Rest of Middle East and Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Aditya Birla Chemicals

6.4.2 China National Bluestar (Group) Co.,Ltd.

6.4.3 Ercros, S.A.

6.4.4 Formosa Plastics Corporation

6.4.5 Hanwha Solutions

6.4.6 INEOS

6.4.7 Inner Mongolia Junzheng Energy & Chemical Group Co., Ltd.

6.4.8 Kem One SAS

6.4.9 LG Chem

6.4.10 Occidental Petroleum Corporation

6.4.11 Orbia

6.4.12 Reliance Industries Limited

6.4.13 SABIC

6.4.14 Shaanxi Coal & Chemical Industry Group Co., Ltd.

6.4.15 Shin-Etsu Chemical Co., Ltd.

6.4.16 Tianye Group

6.4.17 Westlake Corporation

6.4.18 Xinjiang Zhongtai Chemical Co., Ltd.

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

7.2 Recycled PVC and Circular Economy Integration

7.3 Green Hydrogen-Driven Chlor-Alkali for Carbon-Neutral PVC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Polyvinyl Chloride (PVC) - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com