

Market Study: Polyvinyl Chloride (PVC)



World Report (8th edition)

This brochure provides further information on the study “Polyvinyl Chloride – World (8th edition)”

Executive Summary

Everything watertight? PVC is used to make pipes, hoses, roofing membranes and pond liners, waterstops, window profiles, and door frames, as well as truck tarpaulins and shoe soles, for example. Although PVC is no longer the most produced plastic in the world, it is still one of the best-selling thermoplastics alongside polyethylene and polypropylene. The latest Ceresana study, which is already the eighth edition, forecasts further growth for this versatile material: Until 2032, the global demand is likely to rise to 58.1 million tonnes.

PVC is mainly used by construction industry

Almost two thirds of the entire production is purchased by the construction industry and used for a wide variety of applications: from floor coverings to façade cladding and roof panels, as well as seals, cables, dowels, and fastening elements. Pipes and pipelines alone, the most important PVC application, account for more than 36% of PVC consumption. This is followed by profiles with 20% and films and sheets with 18.5%. Sewage pipes in particular are made of rigid PVC; the market for PVC pipes for potable water and industrial applications is somewhat smaller. Compared to pipes made of concrete or metal, products made of PVC are lighter, more flexible, more resistant to chemicals, and generally more durable.

Packaging made from rigid PVC & flexible PVC

After the construction sector, the second largest PVC consumer is the packaging industry, which processes around 16.7% of the PVC produced worldwide. PVC is used to produce rigid packaging, i.e. containers such as butter or yogurt pots, bottles, boxes, and lids, but also flexible packaging such as packaging films, bags and sacks, shrink and stretch films. Other everyday products made of PVC include credit cards, artificial leather, toilet seats, and brush-

es. PVC is used as a good electrical insulator for insulating tapes and protective coatings for pliers or other tools. Medical technology requires PVC, which is resistant to chemicals and disinfectants, e.g. for infusion bags, tubes, catheters, and gloves. Rigid PVC foams are used as a core material for fiber composites and lightweight sandwich constructions.

Current 8th edition of the market study PVC:

Chapter 1 provides a description and analysis of the global market – including forecasts up to 2032: For each region of the world, demand in tonnes and revenues in US dollars and euros are given. Furthermore, regional demand per product and application area is analyzed. The following various PVC products are discussed in detail: Sewage pipes, potable water pipes, other pipes, profiles, films & sheets, cables & cable sheathing, flooring, containers, and others.

The study also examines application areas and sectors of use for PVC: Flexible packaging, rigid packaging, construction industry, transportation, E&E, industry, and others.

Chapter 2 looks at 46 countries individually, which constitute the largest national markets for PVC. The following are shown in each case: country-specific demand, revenues, production, and trade, demand per PVC product, demand per application, revenues per application, demand per PVC type (rigid & flexible).

Chapter 3 provides useful profiles of the largest manufacturers, clearly arranged according to contact details, revenues, net income, product range, production sites, capacities, and profile summary. In-depth profiles of 70 manufacturers are given, such as ChemChina, Formosa Plastics, Ineos, Occidental, Orbia, Shin-Etsu, Westlake, and Xinjiang Tianye.

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2.2.1 Poland

2.2.1.1 Demand and Revenues

Total demand for PVC in Poland amounted to approx. X tonnes in 2022. We forecast demand to increase by X% p.a. to approx. X tonnes in 2032. The Polish market volume regarding revenues amounted to approx. EUR X million. In 2032, we expect a value of EUR X million.

million USD	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Flexible Packaging	x	x	x	x	x	x	x	x	x	x% p.a.
Rigid Packaging	x	x	x	x	x	x	x	x	x	x% p.a.
Construction	x	x	x	x	x	x	x	x	x	x% p.a.
Transportation	x	x	x	x	x	x	x	x	x	x% p.a.
E&E	x	x	x	x	x	x	x	x	x	x% p.a.
Industry	x	x	x	x	x	x	x	x	x	x% p.a.
Others	x	x	x	x	x	x	x	x	x	x% p.a.
Total	x	x	x	x	x	x	x	x	x	x% p.a.

Table: Revenues generated in Poland from 2020 to 2032, in million USD – split by application

in 1,000 tonnes	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Flexible Packaging	x	x	x	x	x	x	x	x	x	x% p.a.
Rigid Packaging	x	x	x	x	x	x	x	x	x	x% p.a.
Construction	x	x	x	x	x	x	x	x	x	x% p.a.
Transportation	x	x	x	x	x	x	x	x	x	x% p.a.
E&E	x	x	x	x	x	x	x	x	x	x% p.a.
Industry	x	x	x	x	x	x	x	x	x	x% p.a.
Others	x	x	x	x	x	x	x	x	x	x% p.a.
Total	x	x	x	x	x	x	x	x	x	x% p.a.

Table: Demand in Poland from 2020 to 2032 – split by application

in 1,000 tonnes	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Sewage – Pipes	x	x	x	x	x	x	x	x	x	x% p.a.
Potable Water – Pipes	x	x	x	x	x	x	x	x	x	x% p.a.
Other – Pipes	x	x	x	x	x	x	x	x	x	x% p.a.
Profiles	x	x	x	x	x	x	x	x	x	x% p.a.
Films & Sheets	x	x	x	x	x	x	x	x	x	x% p.a.
Cables & Cable Sheathing	x	x	x	x	x	x	x	x	x	x% p.a.
Flooring	x	x	x	x	x	x	x	x	x	x% p.a.
Containers	x	x	x	x	x	x	x	x	x	x% p.a.
Others	x	x	x	x	x	x	x	x	x	x% p.a.
Total	x	x	x	x	x	x	x	x	x	x% p.a.

Table: Demand in Poland from 2020 to 2032 – split by product

Market Study: "Polyvinyl Chloride –World (8th edition)"

46 Countries, 70 Producers, 530 Pages, 146 Graphs, 369 Tables; 04/2024

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in 1,000 tonnes	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Rigid PVC	x	x	x	x	x	x	x	x	x	x% p.a.
Flexible PVC	x	x	x	x	x	x	x	x	x	x% p.a.
Total	x	x	x	x	x	x	x	x	x	x% p.a.

Table: Demand in Poland from 2020 to 2032 – split by type

With X tonnes, the application area "construction" was the largest application area of PVC in 2022. The sub-market "rigid packaging" is likely to account for the highest percentage increases in the years to come.

Since the end of communism, and especially since joining the EU in 2004, Poland has achieved impressive economic growth and, in terms of per capita purchasing power, has overtaken the "old" EU states of Greece and Portugal, for example. The war in neighboring Ukraine is currently unsettling: About 400,000 Ukrainians (about one-third of all construction workers) were hired to replace Polish construction workers who left for Western Europe – but many of them have now returned to Ukraine as soldiers. On the other hand, Poland benefits from the USA shifting its interests (and troops) from Germany to Eastern Europe. Provided conflicts with the EU are resolved, Poland can expect to receive around EUR 173 billion in EU funding by 2027.

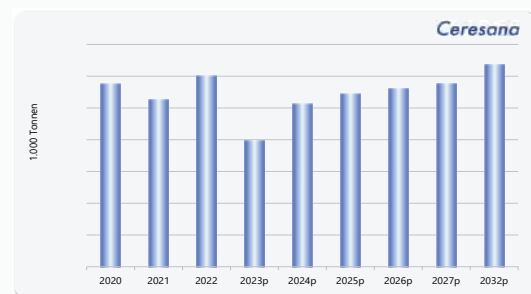
In contrast to Western Europe, new buildings are more important for the construction industry in Poland than renovations of existing buildings. According to Statistics Poland, 93,700 new apartments were completed in Poland from January to May 2023, i.e. 2.5% more than in the same period last year. In contrast, the number of building permits for new apartments decreased to 91,000, i.e. by 33.3% compared to the previous year; construction started on 69,500 apartments, which constitutes a decrease of 27.4%. In the whole year of 2021, 109,400 new residential buildings were built in Poland, which is 18% more than in 2020 and 38.9% more than in 2017. 234,700 new apartments were completed, 6.3% more than in 2020 and 31.6% more than in 2017. The fact that the consequences of the COVID-19 pandemic were quickly overcome in the construction sector is possibly due, among other things, to the fact that since May 2021, the construction of single-family homes up to 90 m² no longer requires a permit, but only needs to be reported to the building inspectorate.

2.2.1.2 Production and Trade

PVC production volume amounted to approx. X tonnes in 2022. We forecast production volume to amount to approx. X tonnes in 2032. Relative to 2022, this constitutes an average increase of X% per year.

in 1,000 tonnes	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Production	x	x	x	x	x	x	x	x	x	x% p.a.
Import	x	x	x	x	x	x	x	x	x	x% p.a.
Export	x	x	x	x	x	x	x	x	x	x% p.a.
Demand	x	x	x	x	x	x	x	x	x	x% p.a.

Table: Production, import, export, and demand in Poland from 2020 to 2032



Graph: Production in Poland from 2020 to 2032

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- Belgium (1 producer)
- France (1)
- Spain (1)
- United Kingdom (1)

3.2 Eastern Europe

- Hungary (1)
- Poland (1)
- Russia (3)
- Slovakia (1)
- Turkey (1)

3.3 North America

- Mexico (1)
- USA (3)

3.4 South America

- Brazil (2)
- Venezuela (1)

3.5 Asia-Pacific

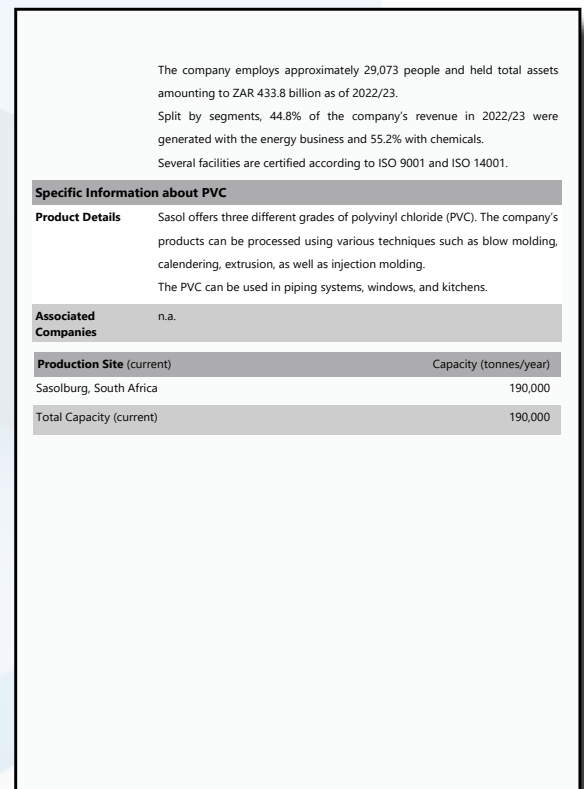
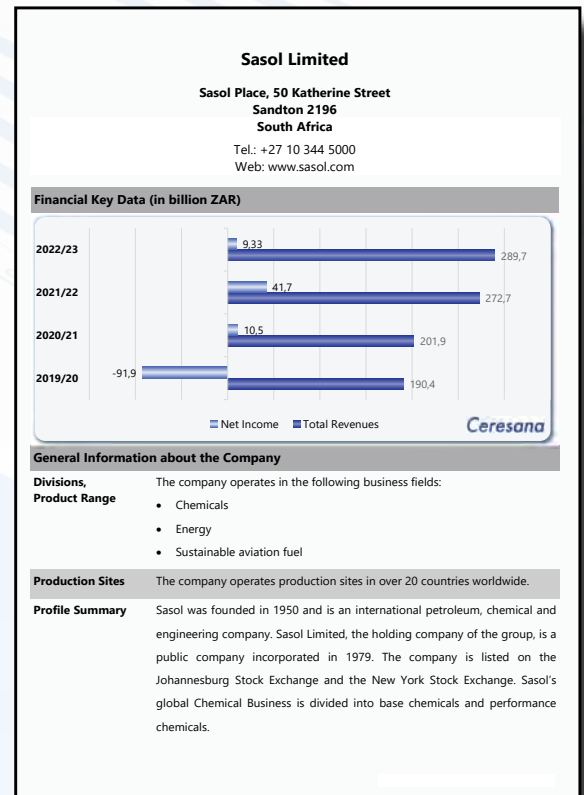
- China (24)
- Hong Kong (1)
- India (5)
- Indonesia (2)
- Japan (6)
- Pakistan (1)
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- Taiwan (3)
- Thailand (1)
- Vietnam (1)

3.6 Middle East

- Iraq (1)
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- Egypt (1)
- Morocco (1)
- South Africa (1)



*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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