



Global Ethylene Dichloride Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 20.8 bn
Forecast (2031)	USD 29.7 bn
CAGR (2021-2031)	6.1%
Study period	2021-2031
Largest region	Asia-Pacific · 51.8%
Fastest-growing region	Middle East and Africa · 7.4%
Market concentration	Moderate
Licence	Individual / Company

The global ethylene dichloride market reached USD XXX billion and XXX metric tons in 2025. Market value is forecast to rise to USD XXX billion by 2031, advancing at a XX% CAGR as PVC infrastructure demand, integrated chlorvinyl investment and higher replacement construction support consumption. Asia-Pacific accounted for XX% of 2025 revenue, while the Middle East and Africa is projected to record the fastest regional growth at XX% annually. Captive conversion into vinyl chloride monomer remains the industry's defining commercial structure, representing XX% of EDC consumption.

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Executive summary

The global ethylene dichloride market reached USD XXX billion and XXX metric tons in 2025. Market value is forecast to rise to USD XXX billion by 2031, advancing at a XX% CAGR as PVC infrastructure demand, integrated chlorvinyl investment and higher replacement construction support consumption. Asia-Pacific accounted for XX% of 2025 revenue, while the Middle East and Africa is projected to record the fastest regional growth at XX% annually. Captive conversion into vinyl chloride monomer remains the industry's defining commercial structure, representing XX% of EDC consumption.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global ethylene dichloride demand reached XXX metric tons in 2025 and is forecast to reach XXX metric tons in 2031.
- The market generated USD XXX billion in 2025 and will expand to USD XXX billion by 2031 at a XX% CAGR.
- Vinyl chloride monomer production absorbed XX% of global EDC value in 2025, reflecting the chemical's central role in the PVC chain.
- Asia-Pacific represented XX% of global market value in 2025, led by China's integrated chlor-alkali, VCM and PVC production base.
- Captive and intracompany supply accounted for XX% of 2025 consumption, leaving a comparatively thin merchant market exposed to outages and freight disruptions.
- Direct chlorination supplied XX% of market value in 2025, while oxychlorination is forecast to grow faster at XX% annually through 2031.
- The U.S. Environmental Protection Agency reports that 2016 Chemical Data Reporting volumes for 1,2-dichloroethane were between XXX and XXX pounds annually in the United States.
- The European Commission's large-volume organic chemicals reference document identifies approximately XX% of EDC use as feedstock for VCM and reported XXX metric tons of European EDC capacity in 2013.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Ethylene Dichloride Market Trends and Growth

Drivers

Ethylene dichloride economics are governed by the entire chlorine-to-PVC chain rather than by a standalone commodity balance. Producers optimize chlorine, ethylene, hydrogen chloride, EDC, VCM, caustic soda and PVC simultaneously, making electricity cost, co-product realization and downstream operating rates as important as the nominal EDC price.

Demand growth is structurally linked to PVC applications in water systems, construction profiles, electrical networks, healthcare and transport. Asia supplies the majority of incremental consumption, while North American and Middle Eastern producers use advantaged feedstocks and coastal logistics to compete for merchant balancing volumes.

Regulation and asset age are widening the cost curve. Modern membrane chlor-alkali units, efficient oxychlorination reactors, high-recovery cracking furnaces and continuous emissions monitoring support higher utilization, while older plants face rising maintenance, energy and environmental-control expenditure.

Growth drivers

PVC Pipe and Infrastructure Expansion

EDC demand is anchored by rigid PVC used in water, sewer, drainage, irrigation and electrical-conduit systems. Large municipal networks and replacement programs translate directly into higher VCM operating rates, giving infrastructure expenditure a durable multiplier across the integrated chlorvinyl chain.

Asian Urbanization and Manufacturing Growth

China remains the largest consumption center, while India and Southeast Asia are adding housing, utility and industrial capacity from lower per-capita PVC bases. Regional demand growth supports higher utilization of integrated EDC and VCM plants and additional import requirements in markets without balanced chlorine chains.

Integrated Chlorvinyl Investment

New ethylene, membrane chlor-alkali and VCM assets reduce transfer costs and improve control over feedstock availability. Projects such as Shintech's Plaquemine expansion strengthen EDC economics by placing chlorine, ethylene and downstream conversion within one production system.

Developed-Market Network Replacement

Aging water, wastewater, power and communications networks support PVC demand even where new-building activity is mature. Replacement expenditure is less volatile than residential construction and favors long-lived pipe, fittings, cable insulation and conduit applications.

Advantaged Feedstock Hubs

Low-cost ethane, export terminals and large chlor-alkali systems support competitive EDC production on the U.S. Gulf Coast and in selected Middle Eastern complexes. These hubs can supply structurally short VCM assets and absorb temporary regional imbalances through seaborne trade.

Healthcare and Electrification Applications

Medical tubing, blood bags, cable insulation, battery-area infrastructure and renewable-energy electrical systems broaden the PVC demand base beyond conventional construction. These applications reward reliable resin quality and support integrated producers with specialty downstream portfolios.

Restraints

Tighter Hazardous-Air Controls

EDC is regulated as a hazardous air pollutant in the United States and is subject to stringent emissions, leak-detection and risk-management requirements. Fenceline monitoring and equipment-control investments raise fixed costs, particularly for older or smaller production units.

PVC and VCM Overcapacity

Large capacity additions can outpace downstream demand and compress operating rates across EDC, VCM and PVC. The resulting margin pressure accelerates rationalization of high-cost assets, as demonstrated by recent North American and European chlorvinyl closures.

European Energy-Cost Disadvantage

Chlor-alkali production is electricity intensive, while EDC economics also depend on competitive ethylene and steam. Persistently elevated European input costs reduce utilization, increase reliance on imported intermediates and place older integrated sites under restructuring pressure.

Restricted Merchant Logistics

EDC's hazardous classification requires dedicated storage, vessels, rail equipment and handling procedures. The thin merchant market magnifies the effects of terminal constraints, weather interruptions and plant outages, limiting rapid supply substitution between regions.

Ethylene Dichloride Market Driver and Restraint Impact Through 2031

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
PVC Pipe and Infrastructure Expansion	XXX	XXX	XXX
Asian Urbanization and Manufacturing Growth	XXX	XXX	XXX
Integrated Chlorvinyl Investment	XXX	XXX	XXX
Developed-Market Network Replacement	XXX	XXX	XXX
Advantaged Feedstock Hubs	XXX	XXX	XXX
Healthcare and Electrification Applications	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Tighter Hazardous-Air Controls	XXX	XXX	XXX
PVC and VCM Overcapacity	XXX	XXX	XXX
European Energy-Cost Disadvantage	XXX	XXX	XXX
Restricted Merchant Logistics	XXX	XXX	XXX

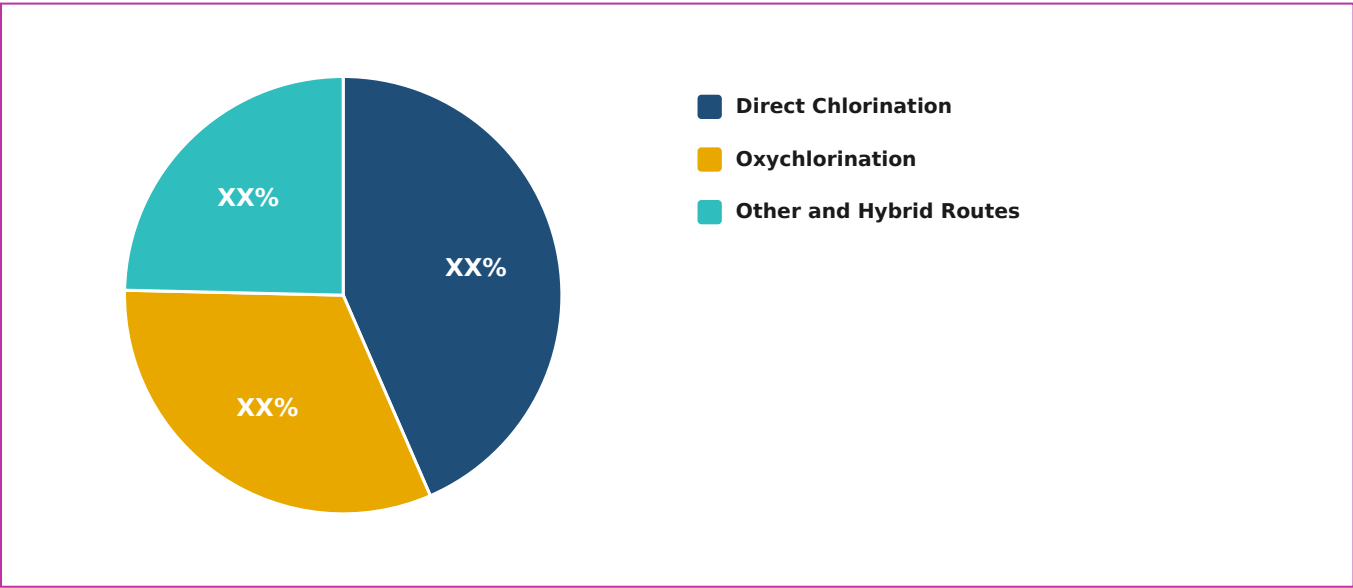
Source: XXX

Ethylene Dichloride Market Segmentation by Process, Application and Supply Model

By Production Process

Integrated producers balance direct chlorination and oxychlorination to manage chlorine and hydrogen chloride across the VCM loop. Direct chlorination retains the largest share because of its high reaction selectivity and straightforward integration with ethylene and chlorine supply. Oxychlorination grows faster as operators maximize HCl recycling, reduce net chlorine requirements and improve total-site economics.

Value share by production Process, 2025



Source: XXX

Value by production Process, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Chlorination	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Oxychlorination	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other and Hybrid Routes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

VCM production dominates because thermal cracking of purified EDC is the standard industrial route to the monomer used in PVC. Ethylene amines and solvent-related uses form small but higher-value niches with different purity and handling requirements. VCM remains the fastest absolute-growth application as pipe, profiles, cable and medical PVC consumption expands.

Value by application, USD bn

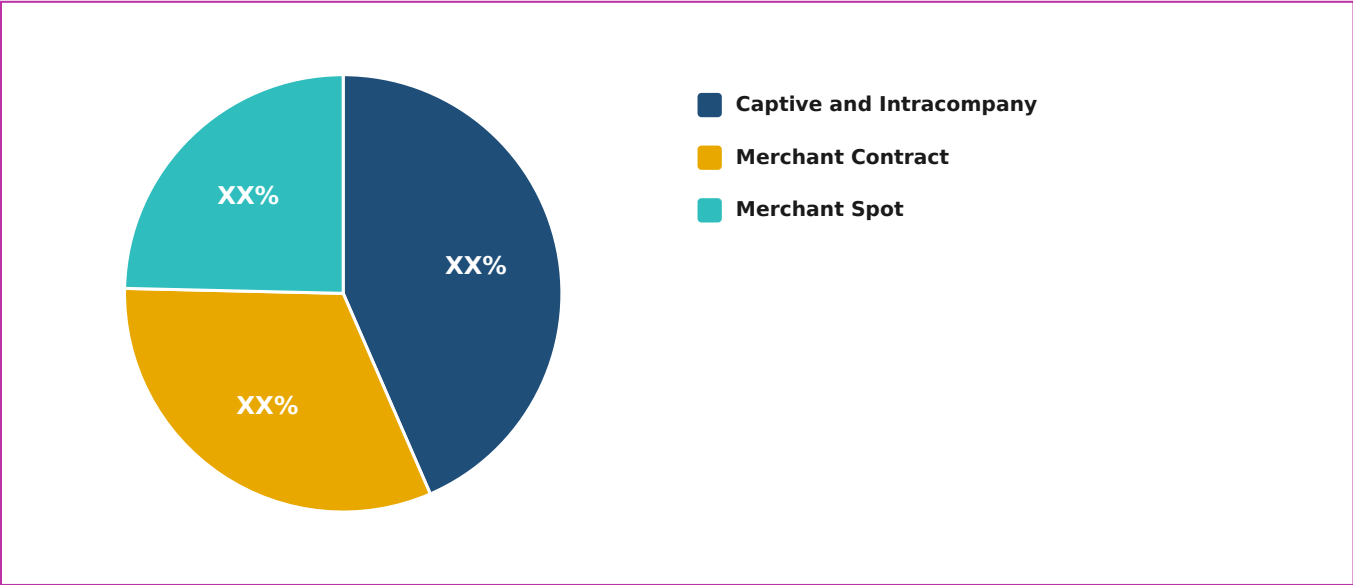
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Vinyl Chloride Monomer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ethylene Amines	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chlorinated Solvents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Chemical Intermediates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Supply Model

Most EDC is produced inside integrated chlorvinyl complexes and transferred directly to affiliated VCM crackers. Merchant supply is concentrated in outage coverage, long-term balancing contracts and deliveries to VCM sites without sufficient local EDC capacity. Merchant volumes grow faster through 2031 as selected European and Asian assets rely more heavily on coastal imports.

Value share by supply Model, 2025



Source: XXX

Value by supply Model, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Captive and Intracompany	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Merchant Contract	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Merchant Spot	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Industrial VCM-grade EDC is optimized for continuous purification and cracking at large-scale plants. High-purity and specialty material serves laboratory, pharmaceutical-processing and specialty-synthesis requirements at substantially higher unit prices but negligible physical volume. Specialty grade grows moderately as compliance and analytical requirements become more exacting.

Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial VCM Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
High-Purity and Specialty Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Logistics Mode

Pipeline and direct site transfer dominate because most EDC moves only between adjacent production and cracking units. Marine transport is the principal mode for interregional balancing and long-term supply to coastal VCM plants, while rail and road tankers serve shorter merchant corridors and smaller requirements. Marine volumes will grow fastest as European and Asian import dependence increases.

Value by logistics Mode, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Pipeline and Direct Site Transfer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Marine Tanker	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rail Tank Car	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Road Tanker and Other	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

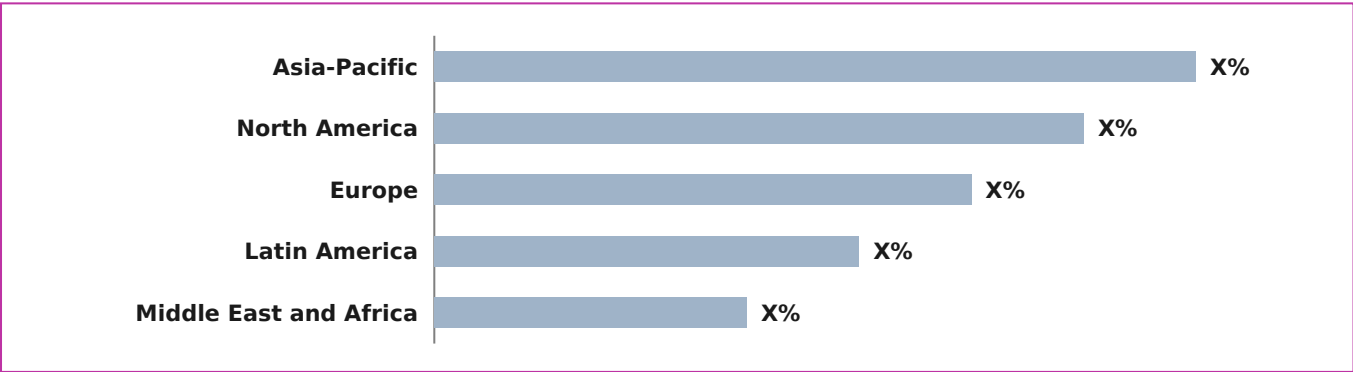
Ethylene Dichloride Market Regional Analysis and Country Outlook

Asia-Pacific controlled XX% of global EDC revenue in 2025 and will remain the principal source of incremental consumption through 2031. China combines the world's largest PVC conversion base with extensive coal-based and ethylene-based chlorvinyl assets, while India, Indonesia, Thailand and Vietnam generate faster demand growth from water networks, housing, irrigation and electrical infrastructure. The region's competitive position varies sharply by feedstock route: coastal ethylene-based complexes compete directly with carbide-route PVC and imported EDC or VCM.

North America accounted for XX% of 2025 value and remains the strongest export-oriented EDC production platform. The U.S. Gulf Coast benefits from ethane-derived ethylene, large membrane chlor-alkali units, integrated VCM capacity and deep-water logistics. Shintech's planned ethylene and VCM investment expands long-run integration, although Westlake's December 2025 closures demonstrate that older assets remain vulnerable when PVC utilization and chlorine-chain margins weaken.

Europe represented XX% of 2025 revenue, but its outlook is shaped by energy costs, asset consolidation and reliance on coastal EDC movements. Westlake's acquisition of the Wilhelmshaven PVC and VCM site and INEOS Inovyn's agreement to acquire the United Kingdom's Runcorn EDC asset reinforce strategically located integrated chains. Middle East and Africa is the fastest-growing region at XX% annually, supported by advantaged feedstocks, Gulf industrial diversification and rising African infrastructure consumption.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Ethylene Dichloride Market Competitive Landscape and Company Share

The global EDC market has moderate concentration at the producer level and high concentration within individual regional supply basins. Shin-Etsu Chemical, Westlake, OxyChem, Formosa Plastics and INEOS Inovyn anchor the leading integrated positions, while major Asian producers operate large captive chains serving domestic PVC markets. The top five groups accounted for XX% of global EDC-equivalent capacity in 2025.

Vertical integration is the defining competitive advantage because chlorine is difficult to transport economically and most EDC is cracked into VCM at affiliated sites. Producers compete through ethylene and power costs, membrane-cell efficiency, cracker yield, HCl recycling, plant reliability and access to marine terminals rather than through product differentiation. Merchant transactions consequently act as balancing volumes around planned maintenance, outages and regional feedstock mismatches.

Recent strategy divides into growth at advantaged sites and rationalization of structurally high-cost assets. Shintech is adding upstream ethylene and VCM capacity in Louisiana, OxyChem has modernized its Battleground chlor-alkali platform, and Westlake acquired Wilhelmshaven after closing selected North American chlorvinyl units. Low-carbon PVC programs are also pulling emissions performance upstream, increasing the commercial value of renewable-power procurement, membrane electrolysis and auditable product-carbon data.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Shin-Etsu Chemical Co., Ltd.	XXX	XXX	XXX	XXX
Westlake Corporation	XXX	XXX	XXX	XXX
Occidental Chemical Corporation	XXX	XXX	XXX	XXX
Formosa Plastics Corporation	XXX	XXX	XXX	XXX
INEOS Inovyn	XXX	XXX	XXX	XXX
KEM ONE	XXX	XXX	XXX	XXX
Vynova Group	XXX	XXX	XXX	XXX
LG Chem Ltd.	XXX	XXX	XXX	XXX
Reliance Industries Limited	XXX	XXX	XXX	XXX
Hanwha Solutions Corporation	XXX	XXX	XXX	XXX

Source: XXX

Ethylene Dichloride Market Forecast, Scenarios and Strategic Opportunities

The market will add XXX metric tons of annual consumption between 2025 and 2031, with Asia-Pacific supplying XX% of that increase. Base-case growth assumes sustained PVC infrastructure demand, improving construction activity after the 2024-2026 inventory correction and disciplined commissioning of integrated capacity. Market value grows faster than volume as compliance expenditure, energy costs and asset-replacement requirements lift the long-run price floor.

In the upside scenario, accelerated water-network investment and stronger Indian and Southeast Asian housing activity raise 2031 demand to XXX metric tons. The downside scenario reaches XXX metric tons if Chinese PVC overcapacity persists, European rationalization accelerates and residential construction remains weak. Coastal integrated assets with flexible EDC, VCM and PVC optimization retain the highest utilization across all scenarios.

Winning strategies will combine advantaged chlorine and ethylene supply with high cracker reliability, closed-loop HCl utilization, modern emissions control and export-capable storage. Producers that document lower embedded carbon will gain preferred-supplier status among PVC converters serving infrastructure, healthcare and automotive customers, while non-integrated VCM operators will prioritize multi-year EDC contracts and diversified port access.

Opportunities

- Low-carbon EDC and VCM produced with membrane electrolysis and renewable electricity
- Capacity debottlenecking at integrated coastal chlorvinyl complexes
- Long-term EDC supply contracts for non-integrated VCM assets
- Digital optimization of oxychlorination, cracking and by-product recycling
- Import terminals and storage serving structurally short regional VCM plants
- Infrastructure-led PVC growth in India, Southeast Asia, the Gulf states and Africa

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