

PVC consumption holds firm in Italy

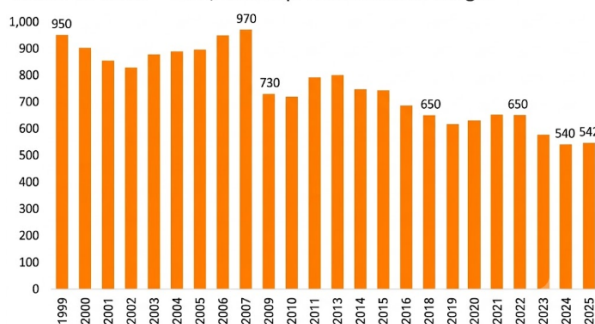
Slight growth in 2025, supported by the strong performance of flexible applications. A possible but limited recovery in volumes is expected this year.

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In line with the broader trend for thermoplastics, consumption of virgin PVC in Italy was broadly stable last year, with 542,000 tonnes processed, around half a percentage point higher than in 2024.

Italian virgin PVC market

Historical trend – kton, data expressed as resin weight



Source: Plastic Consult

Rigid PVC edged down to 276,000 tonnes, equal to 51 per cent of total consumption, with profiles and pipes retaining their position as the main application areas.

Flexible PVC consumption, by contrast, rose by 2.6 per cent to 266,000 tonnes.

As in previous years, the market data were published by PVC Forum Italia, based on surveys carried out by consultancy Plastic Consult.

For the current year, the supply chain expects a possible but limited recovery in volumes, supported by infrastructure investment, environmental requirements in public procurement - particularly for recycled material - and growing attention to durability and material performance. These effects could, however, be offset by still-weak end demand and cost volatility, especially in energy, according to the PVC industry association.

Application sector	Rigid PVC	Flexible PVC	Total PVC	
	Tonnes	Tonnes	Tonnes	%
Building and construction	179,300	26,300	205,600	37.9
Packaging	23,300	19,200	42,500	7.8
Electrical	2,700	45,600	48,300	8.9
Furniture and furnishings	11,200	4,400	15,600	2.9
Paper converting and cartonboard	8,000	13,600	21,600	4.0
Leisure	-	23,900	23,900	4.4
Agriculture	11,000	-	11,000	2.0
Telecommunications	-	13,300	13,300	2.5
Transport	-	18,300	18,300	3.4
Footwear and clothing	-	5,700	5,700	1.1
Appliances	-	6,000	6,000	1.1
Other*	16,700	54,500	71,200	13.1
Compound exports	23,800	36,200	59,000	10.9
TOTAL	276,000	266,000	542,000	100.0

* Medical items, technical uses, other (luggage, leather goods, foam sheets, conveyor belts, etc.)

Source: "PVC consumption in Italy", a study carried out by Plastic Consult on behalf of PVC Forum

cent; and paper converting. at 4 per cent.

Looking in greater detail at end markets, construction remains the main outlet for PVC in Italy, absorbing around 38 per cent of the total, or 205,600 tonnes. It is followed by "other applications", at 29 per cent, including medical articles - which are growing - technical uses, agriculture and compounds intended for export. Next come cables and electrical materials, at 12 per cent; packaging, at 8 per cent; consumer goods, furniture and leisure, at 8 per

Among two of the polymer's main applications, window and door profiles and pipes, volumes processed in Italy for the former stood at 67,500 tonnes, down 10 per cent from 2024, reflecting the gradual reduction in building incentives.

The pipe segment, by contrast, remained stable, with volumes of 75,200 tonnes, equal to 40 per cent of the total plastic pipe market.

PVC maintains significant shares in sewerage networks, at 29,400 tonnes, and in civil drainage systems, at 29,600 tonnes, where it retains market shares that are higher than, or clearly predominant over, competing materials.

It also accounts for around 22 per cent of pressure pipes, with 16,200 tonnes processed, 51 per cent of which was destined for export.

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