

Vietnam Acetylene Market, By Production (Thermal Cracking, Calcium Carbide, Hydrocarbon Pyrolysis), By Application (Welding, Chemical Raw Material, Portable Lighting), By End User (Aerospace, Automotive, Chemical, Agriculture, Metal Fabrication), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Report description:

Vietnam Acetylene Market was valued at USD 70.50 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.08% through 2029. The acetylene market in Vietnam is witnessing substantial growth, fueled by the rapid expansion of the country's industrial sector and the rising demand for acetylene applications across multiple industries. As a versatile gas with high combustion temperatures, acetylene (C_2H_2) plays a critical role in welding, metal cutting, and chemical synthesis. This growth is directly linked to Vietnam's robust economic development, increased urbanization, and the acceleration of manufacturing activities, particularly in construction, automotive, and electronics.

With the industrial landscape evolving, the acetylene market is expected to see continued expansion, bolstered by foreign direct investment (FDI) and a growing domestic manufacturing base. However, the market must address key challenges, including stringent safety regulations due to the gas's flammability, and competition from alternative gases like propane, which are perceived to be safer and more cost-effective in some applications.

Technological advancements in acetylene storage and distribution, coupled with a shift towards sustainable manufacturing processes, present significant opportunities for both local and international companies. These developments will allow market participants to differentiate themselves and meet the increasing demand for high-performance industrial gases, positioning the acetylene market for steady growth in the coming years.

Key Market Drivers

Rapid Industrialization and Infrastructure Development

Rapid industrialization and infrastructure development in Vietnam are among the primary catalysts driving the growth of the acetylene market. As one of the fastest-growing economies in Southeast Asia, Vietnam is undergoing a transformation marked by

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large-scale industrial projects, urban expansion, and infrastructural modernization. Acetylene, a critical industrial gas, plays a pivotal role in supporting these activities, especially in sectors requiring welding, metal cutting, and chemical processing. Vietnam is witnessing a surge in construction projects, driven by both public and private investments aimed at building highways, bridges, railways, airports, commercial buildings, and housing developments. These projects require extensive metalwork, such as welding and cutting, where acetylene is widely used due to its high-temperature flame, making it essential for joining and shaping metals. The sheer volume of construction activities across the country directly increases the demand for acetylene, as builders and contractors rely on its efficiency in large-scale infrastructure development. With rapid urbanization, the government is focusing on developing smart cities and modern urban infrastructure. Major urban centers like Ho Chi Minh City and Hanoi are undergoing expansions to accommodate growing populations, which includes building new residential complexes, office buildings, and public utilities. Acetylene is indispensable in fabricating the steel structures and pipelines that form the backbone of these urban projects. As urban infrastructure expands, the need for industrial gases, including acetylene, grows in parallel.

The Vietnamese government has established numerous industrial parks and special economic zones (SEZs) to attract foreign direct investment (FDI) and boost the country's manufacturing base. These zones host industries that require acetylene for critical processes like metal fabrication, heavy machinery manufacturing, and shipbuilding. As these industrial hubs continue to develop, the demand for acetylene increases to support the welding, cutting, and processing activities within these factories and workshops. Vietnam has a growing heavy industry sector, including shipbuilding, which relies heavily on acetylene for its high-heat cutting and welding capabilities. The construction and maintenance of ships, machinery, and large-scale equipment in Vietnam's industrial zones require substantial quantities of acetylene to meet production standards. As more industrial zones are built, particularly in coastal areas like Haiphong and Vung Tau, acetylene consumption is expected to grow substantially. Vietnam is also investing in energy infrastructure, including the construction of power plants, oil refineries, and gas pipelines. These large-scale projects demand extensive metalworking, for which acetylene is the preferred gas due to its efficiency in cutting and welding steel and other metals used in energy systems. The growing energy sector, particularly in renewable energy like wind and solar power, also requires substantial infrastructure, including the installation of metal towers and panels, further driving acetylene demand. Vietnam's oil and gas sector is seeing renewed investment in refining capacity, offshore exploration, and pipeline infrastructure. Acetylene is a critical component in the maintenance and fabrication of equipment used in the oil and gas sector. As Vietnam expands its oil refining capacity and builds new pipelines, the need for acetylene in welding and metal cutting operations increases, contributing to the market's overall growth.

Transportation Networks: Significant investments in Vietnam's transportation infrastructure, including roadways, railways, and airports, are driving the demand for acetylene. These projects involve large-scale metalworks in the form of bridges, tunnels, and high-speed railway systems, which require precision welding and cutting services where acetylene is a crucial input. As Vietnam develops a more advanced transportation network to improve domestic connectivity and facilitate trade, acetylene consumption will rise alongside these capital-intensive projects. As a major exporter and trading nation, Vietnam is investing heavily in modernizing its ports and maritime infrastructure to accommodate larger shipping volumes. Shipyards and port construction sites are key consumers of acetylene, using it extensively in the fabrication of shipping containers, dock structures, and cranes. The growth of Vietnam's maritime infrastructure, particularly in export hubs like Danang and Haiphong, is thus a significant driver of acetylene demand. **Strategic National Projects:** The Vietnamese government is actively promoting infrastructure development through large-scale, government-funded initiatives. These projects are aimed at improving national transportation, utilities, and industrial facilities, aligning with Vietnam's vision to become a more industrialized nation by 2030. For example, projects such as the North-South Expressway and the Long Thanh International Airport are expected to drive significant demand for construction materials and industrial gases, including acetylene, used for high-precision metalwork. The government's encouragement of public-private partnerships for major infrastructure projects is bringing in new investments in road construction, metro systems, and power plants. Such partnerships are enabling the construction of key infrastructure projects that rely on acetylene for industrial welding, cutting, and chemical processes. As the PPP model gains traction, more construction and industrial projects are anticipated, further boosting acetylene demand.

Expansion of Manufacturing Activities

The expansion of manufacturing activities in Vietnam is a key driver of growth for the country's acetylene market. Acetylene is widely used in various manufacturing processes due to its high flame temperature and versatility in welding, metal cutting, and

chemical synthesis. As Vietnam strengthens its position as a manufacturing hub in Southeast Asia, the demand for industrial gases, particularly acetylene, is surging. This expansion can be attributed to both domestic production growth and foreign direct investment (FDI) in sectors like automotive, electronics, textiles, and heavy machinery, all of which rely heavily on acetylene. Vietnam's automotive industry has experienced rapid growth, driven by rising domestic demand, government support, and increasing foreign investment from global automotive giants. Acetylene is essential in the production process of automotive components, particularly in metal cutting and welding for bodywork and engine manufacturing. The automotive sector uses acetylene in the fabrication of steel frames, exhaust systems, and other components that require precision welding. As automotive companies increasingly localize their supply chains to reduce costs and streamline production, local manufacturers rely on acetylene for fabrication processes. This shift towards domestic production amplifies the demand for acetylene within the country, as local automotive part suppliers depend on it for metalwork and repair services. The growing trend of domestic automotive manufacturing, particularly electric vehicle (EV) production, is expected to continue fueling the demand for acetylene. Vietnam has become a major electronics manufacturing hub, with global brands like Samsung, LG, and Intel setting up large-scale production facilities. The manufacturing of electronics often involves precise metal cutting and welding for component assembly, circuit boards, and wiring systems, where acetylene plays a key role. The increasing output of consumer electronics, such as smartphones, laptops, and home appliances, directly correlates with a rise in demand for acetylene in related manufacturing processes. Vietnam's growing semiconductor manufacturing sector is another area driving the acetylene market. Acetylene is used in some advanced manufacturing techniques for semiconductors, as it provides the precision needed for etching and welding components in microelectronics. As Vietnam seeks to climb the value chain in electronics manufacturing, the use of acetylene in high-tech production processes will expand. Acetylene is a key raw material in the production of vinyl chloride monomer (VCM), which is used to manufacture polyvinyl chloride (PVC). PVC is a vital input in the production of synthetic fibers, which are crucial for Vietnam's textile and garment industry. As Vietnam continues to dominate as one of the world's largest textile exporters, the demand for acetylene for synthetic fiber production is growing steadily. Vietnam's textile industry, fueled by its competitive labor costs and trade agreements like the EU-Vietnam Free Trade Agreement (EVFTA), is growing rapidly. This growth increases the need for acetylene, which is used in the creation of chemicals for synthetic fibers and other textile-related materials. Additionally, the fabric cutting and metalworking needed for textile machinery manufacturing are key consumers of acetylene in the sector. Vietnam's heavy machinery and equipment manufacturing sector is a significant driver of the acetylene market. Acetylene's high-temperature flame makes it ideal for cutting and welding metal components in the fabrication of machinery, construction equipment, and industrial tools. As Vietnam continues to modernize its industrial base and export heavy machinery, the consumption of acetylene in the sector increases. Manufacturers of tractors, construction vehicles, and industrial machinery rely heavily on acetylene for high-precision metalworking applications. Besides the manufacturing of heavy equipment, the maintenance and repair operations (MRO) segment, especially in large industrial zones, consumes substantial quantities of acetylene. The frequent need to repair machinery and equipment in factories means that acetylene is essential in welding and cutting for maintenance services, further contributing to its rising demand in the manufacturing sector. Metal fabrication is a key part of Vietnam's growing manufacturing base, with applications in construction, shipbuilding, infrastructure projects, and industrial equipment. Acetylene is widely used in these industries for oxy-acetylene welding, brazing, and metal cutting. As demand for prefabricated steel and other metal products grows in Vietnam's manufacturing sector, the need for acetylene is rising in parallel. Vietnam is a significant player in the global shipbuilding industry, with a growing focus on producing vessels for both domestic use and export. Shipbuilding involves extensive welding and cutting of steel, aluminum, and other metals, processes for which acetylene is indispensable. As Vietnam's shipbuilding capabilities expand, driven by both commercial shipping needs and defense contracts, the demand for acetylene in this sector will continue to grow.

Increasing Chemical Industry Investments

The rise in investments within Vietnam's chemical industry is a significant driver of growth for the acetylene market. Acetylene plays a critical role as a feedstock in the production of various chemicals and is widely used in chemical synthesis, especially in sectors producing plastics, synthetic fibers, adhesives, and other high-demand industrial products. With Vietnam's chemical industry expanding due to both domestic demand and export opportunities, the need for acetylene in chemical processes is growing steadily. One of the major uses of acetylene in the chemical industry is the production of vinyl chloride monomer (VCM), which is the primary precursor for polyvinyl chloride (PVC). PVC is a versatile plastic widely used in construction materials,

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packaging, and consumer goods. As the demand for PVC rises due to infrastructure development and increasing consumer markets, the need for acetylene in VCM production is growing in parallel. Acetylene is also a crucial raw material in the synthesis of acetaldehyde and acetic acid, both of which are essential for producing adhesives, paints, and other industrial chemicals. The rising demand for these products in Vietnam's construction, packaging, and automotive industries has led to greater consumption of acetylene in chemical manufacturing processes.

Vietnam's growing textile and garment industry, which is a key driver of the country's exports, relies heavily on synthetic fibers made from acetylene-derived chemicals such as PVC and vinyl acetate. Investments in the chemical sector are increasing production capacity for synthetic fibers, driving up demand for acetylene. As Vietnam continues to be a global leader in textile production, the need for acetylene to produce these fibers will expand accordingly. The plastics industry in Vietnam is growing rapidly, spurred by rising demand for packaging, consumer goods, and industrial materials. Acetylene is critical in the production of various plastic products, particularly PVC, which is used in a wide range of applications including pipes, cables, and packaging materials. As more chemical manufacturers invest in expanding their plastic production capacity, the demand for acetylene as a feedstock increases, particularly in high-volume production processes. Vietnam's chemical industry is not only expanding in terms of volume but also shifting toward the production of higher-value specialty chemicals. These include performance materials, coatings, and adhesives that require acetylene-based chemical processes. As more investment flows into the production of specialty chemicals for export and domestic consumption, the demand for acetylene, used in high-precision chemical synthesis, is expected to grow. In addition to bulk chemicals, acetylene is used in the synthesis of fine chemicals, which are essential in pharmaceuticals, agrochemicals, and high-tech industries. Vietnam's focus on moving up the value chain in the chemical industry is likely to increase the consumption of acetylene in these high-tech, high-margin sectors.

Vietnam's favorable investment policies, along with its growing status as a manufacturing hub, have attracted significant foreign direct investment (FDI) in the chemical sector. International companies are investing in chemical plants to take advantage of Vietnam's competitive labor costs and its access to regional markets. Many of these chemical plants use acetylene as a core raw material in the production of industrial chemicals. The increasing number of joint ventures and foreign-owned chemical factories further drives the demand for acetylene in large-scale manufacturing. With the influx of foreign investment comes the transfer of advanced technologies, enabling local chemical manufacturers to produce more complex and high-value products. Many of these advanced chemical processes require the use of acetylene, particularly in the synthesis of intermediates and polymers. As Vietnam's chemical industry modernizes and moves towards more technologically advanced manufacturing, the demand for acetylene in these specialized processes will rise. Alongside foreign investment, Vietnam's domestic chemical companies are scaling up their operations to meet rising demand from industries such as construction, automotive, and consumer goods. These local firms are investing in expanding their production capacities, particularly in the areas of industrial chemicals and materials. Acetylene is a key component in these chemical production processes, and as domestic manufacturers grow, they contribute to the increasing demand for acetylene in Vietnam. As local chemical companies expand, there is a growing trend toward strengthening supply chains for raw materials. Vietnam's chemical industry is working to reduce dependence on imported feedstocks by boosting domestic acetylene production to meet the growing needs of the sector. This trend helps increase local consumption of acetylene and contributes to market growth.

Key Market Challenges

Safety and Regulatory Concerns

Acetylene is a highly flammable and explosive gas, posing significant risks during storage, handling, and transportation. Its instability under high pressure requires strict safety protocols, making it difficult for many businesses to manage its use effectively. Industrial accidents involving acetylene, such as explosions, can result in severe damage, injuries, or fatalities. As a result, companies are often hesitant to adopt acetylene at scale, limiting its broader industrial applications.

Vietnam's government and industry regulators have implemented stringent safety regulations for acetylene production, storage, and transportation to minimize risks. Compliance with these regulations requires costly investments in specialized storage systems, safety equipment, and employee training. For small and medium-sized enterprises (SMEs), these costs can be prohibitively high, limiting their ability to adopt acetylene as an industrial gas. Moreover, non-compliance can lead to fines, operational shutdowns, or reputational damage, further deterring businesses from using acetylene. The lack of awareness and insufficient training on the safe use of acetylene in some industrial sectors also restrict its adoption. Many companies lack the

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technical expertise to manage acetylene safely, resulting in a preference for alternative gases or methods that are perceived as safer. This skills gap in handling and storing acetylene reduces its uptake in industries that might otherwise benefit from its unique properties.

Competition from Alternative Gases

Acetylene faces strong competition from other industrial gases, particularly propane, hydrogen, and natural gas. These gases are often used in the same applications as acetylene, such as welding, cutting, and heating, but come with fewer handling risks or lower costs. Propane, for example, is more stable and widely available, making it an attractive alternative for businesses that prioritize safety and cost-efficiency over acetylene's superior flame temperature.

In many cases, alternative gases like propane and natural gas offer a more cost-effective solution for metal cutting and welding applications. Though acetylene provides a higher flame temperature and more precise control, the lower cost and availability of alternative gases are significant factors for companies with tight budgets. In industries like construction and metal fabrication, where cost sensitivity is high, the price advantage of alternative gases often leads to acetylene being overlooked. Innovations in welding and cutting technology are enabling the use of alternative gases with improved efficiency and performance. For example, advancements in plasma cutting and laser welding technology, which use electricity rather than gas, are increasingly preferred in high-tech manufacturing. As industries adopt more efficient and environmentally friendly alternatives, acetylene's market share is gradually eroded, particularly in sectors that prioritize new technologies.

Key Market Trends

Shift Towards Advanced Manufacturing Technologies

The growing adoption of advanced manufacturing technologies in Vietnam's high-value sectors, such as electronics, automotive, and aerospace, is a key trend that is set to drive the future demand for acetylene. These sectors require high-precision welding, cutting, and metal fabrication, where acetylene's superior flame temperature and fine control offer significant advantages. For instance, acetylene's role in oxy-acetylene welding is crucial for precision assembly, which is critical in electronics manufacturing and the production of intricate automotive components. The increasing use of automation and robotics in Vietnam's manufacturing sector is transforming how gases like acetylene are integrated into production. Automated welding and cutting systems that rely on acetylene for their high thermal output are being adopted by industries that aim to improve efficiency and product quality. These advancements enable companies to scale their production while maintaining high standards, making acetylene an integral part of this shift towards more sophisticated manufacturing technologies. As 3D printing technology gains traction in Vietnam's industrial landscape, acetylene is becoming a valuable asset in post-processing applications such as metal finishing, cutting, and joining. The trend towards additive manufacturing, particularly in high-precision sectors, will drive demand for acetylene as companies require gas-based processes to refine and finish complex metal parts produced through 3D printing.

Green Chemistry and Sustainable Industrial Practices

With increasing global and domestic pressure to adopt sustainable industrial practices, companies in Vietnam are seeking greener alternatives in their production processes. Acetylene, known for its cleaner combustion properties compared to other fuel gases like propane or natural gas, is gaining favor as a more environmentally friendly option. As companies transition towards processes that reduce carbon emissions, acetylene's lower environmental impact makes it an attractive choice for industries looking to align with green initiatives.

Acetylene is becoming increasingly important in green chemistry, particularly in the production of bio-based chemicals and polymers. As Vietnam's chemical industry evolves to incorporate more sustainable materials, acetylene is being used in the synthesis of environmentally friendly chemicals, contributing to the circular economy. For example, acetylene can be used in the production of biodegradable plastics or as a feedstock for chemicals that reduce the reliance on fossil fuels. This trend towards greener chemical synthesis will increase the demand for acetylene in processes that align with sustainability goals. The Vietnamese government is introducing stricter environmental regulations that require industries to reduce emissions and adopt cleaner technologies. This regulatory push is accelerating the shift towards gases that offer cleaner burning properties and lower environmental impact. Acetylene's ability to meet these requirements makes it a key resource for industries under pressure to comply with new sustainability standards. As more companies adopt sustainable practices, the role of acetylene in industrial processes will expand, driving market growth.

Segmental Insights

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Production Insights

Based on the category of Production, the Calcium Carbide segment emerged as the dominant in the Vietnam market for Vietnam Acetylene in 2023. Vietnam has abundant natural reserves of limestone, which is a primary raw material for producing calcium carbide, the key feedstock for acetylene generation in the calcium carbide-based process. The country's rich limestone deposits reduce dependence on imports for calcium carbide production, allowing manufacturers to produce acetylene at a competitive cost. This localized availability of raw materials ensures that calcium carbide production is both economically viable and scalable. The calcium carbide production process is relatively cost-effective, especially when local raw materials are available. In comparison to methods such as hydrocarbon pyrolysis, which requires expensive feedstocks like natural gas or petroleum, the calcium carbide method benefits from lower input costs. This affordability makes it the preferred choice for many industrial applications in Vietnam, where price sensitivity and operational efficiency are critical factors. Vietnam has a well-established infrastructure for calcium carbide-based acetylene production, with several facilities operating across the country. These production plants have been optimized for years to ensure cost-effective, large-scale output of acetylene. The existing infrastructure not only reduces the capital expenditure required for new production setups but also provides a reliable supply chain for downstream industries that rely on acetylene. The calcium carbide-based method is a proven and mature technology with minimal technical challenges. Manufacturers are familiar with the operational aspects of this process, reducing the risks associated with adopting alternative methods such as hydrocarbon pyrolysis, which involves higher technological complexity and capital investment. This familiarity and reliability make the calcium carbide-based process the preferred option for industrial acetylene production in Vietnam. These factors collectively contribute to the growth of this segment.

Regional Insights

South Vietnam emerged as the dominant in the Vietnam Acetylene market in 2023, holding the largest market share in terms of value. South Vietnam, particularly the Ho Chi Minh City metropolitan area and surrounding provinces, is the economic powerhouse of the country. The region boasts a diverse industrial base, including manufacturing, construction, and chemical industries, which are significant consumers of acetylene. The high concentration of manufacturing facilities in sectors like metal fabrication, automotive, and electronics results in substantial demand for acetylene for welding and cutting processes. The region is home to several key industrial zones, such as the Saigon Hi-Tech Park and the Tan Binh Industrial Park, which host numerous companies that utilize acetylene in their operations. These zones not only facilitate efficient production and distribution of acetylene but also attract investments in related infrastructure, creating a self-reinforcing cycle of industrial growth and gas consumption. South Vietnam has a more developed transportation infrastructure compared to other regions, facilitating the efficient distribution of acetylene to various industrial users. The region benefits from a network of highways, railways, and ports that ensure timely delivery of acetylene to manufacturing facilities. The presence of major ports like Cat Lai and Cai Mep also allows for easy import of raw materials required for acetylene production, enhancing operational efficiency for producers in the region. The advanced logistics capabilities in South Vietnam enable better supply chain management for acetylene producers. Local manufacturers benefit from shorter lead times and lower transportation costs, making it economically feasible to produce and distribute acetylene at competitive prices. This logistical advantage strengthens South Vietnam's position as the dominant region in the acetylene market.

Key Market Players

• BASF SE

• Linde PLC

• AkzoNobel Vietnam

• Air Liquide Vietnam

• Ambu A/S

• Nippon Sanso Vietnam JSC

• Messer Industrial Gases Co., Ltd Companies

Report Scope:

In this report, the Vietnam Acetylene Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

• Vietnam Acetylene Market, By Production:

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- o Thermal Cracking
 - o Calcium Carbide
 - o Hydrocarbon Pyrolysis
- ?□Vietnam Acetylene Market, By Application:

- o Welding
- o Chemical Raw Material
- o Portable Lighting

?□Vietnam Acetylene Market, By End User:

- o Aerospace
- o Automotive
- o Chemical
- o Agriculture
- o Metal Fabrication

?□Vietnam Acetylene Market, By Region:

- o South Vietnam
- o North Vietnam
- o Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Acetylene Market.

Available Customizations:

Vietnam Acetylene market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

?□Detailed analysis and profiling of additional market players (up to five).

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