

Vietnam Isocyanates Import Research Report 2024-2033

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Abstracts

Isocyanates are a crucial category of chemical raw materials widely used in the production of polyurethanes. The main types of isocyanates include toluene diisocyanate (TDI), methylene diphenyl diisocyanate (MDI), and hexamethylene diisocyanate (HDI). Among these, TDI and MDI are extensively used in the polyurethane industry, while HDI is primarily used in high-performance coatings and elastomers.

Isocyanates are known for their highly reactive chemical properties, which make them highly versatile in industrial applications. TDI plays a significant role in the production of soft polyurethane foams, such as those used in furniture and mattress padding. MDI is commonly used in the production of rigid polyurethane foams, which have excellent insulation properties and are essential for building insulation materials, refrigeration layers, and automotive interiors. HDI, as a consequence of its lower volatility and good chemical resistance, is used to manufacture high-end coatings, particularly in automotive and industrial protective coatings.

CRI analyzes that the upstream industries for isocyanates mainly include petrochemical raw materials such as benzene and toluene, which are transformed through complex chemical reactions to produce isocyanate monomers. The downstream industries include polyurethane manufacturing, which covers a wide range of products such as foams, coatings, adhesives, elastomers, and fibers. Isocyanates are extensively used across these sectors, encompassing nearly all products related to polyurethane.

The global isocyanate industry is highly concentrated, with major producers including BASF, Covestro, Dow Chemical, Huntsman, Mitsui Chemicals, and Tosoh Corporation.

With the development and industrialization of Vietnam, downstream industries for isocyanates, such as chemicals and plastics, are growing rapidly, leading to an increasing market size for isocyanates in Vietnam.

Benefiting from government support, chemical industry capacity transfers, and lower production costs, Vietnam's chemical industry has seen rapid growth and has become a significant part of the country's industrialization process. According to CRI, Vietnam exports a large number of plastic products annually, which has driven the demand for isocyanates.

Additionally, the construction and automotive industries in Vietnam are driving demand for polyurethane products, especially in building insulation materials and furniture manufacturing. The analysis by CRI indicates that due to continued economic and population growth, improved industrial infrastructure, and ongoing foreign investment, the chemical, plastics, and construction industries in Vietnam are expected to maintain robust growth. Therefore, the demand for isocyanates in Vietnam is continually increasing.

However, due to limited local production capacity and a lack of chemical industry basis, technology, and equipment, large-scale production of isocyanates is not cost-effective in Vietnam, leading to a reliance on imports.

According to CRI data, in 2023, the total value of isocyanate imports into Vietnam exceeded USD 200 million. From January to June 2024, the cumulative import value of isocyanates reached approximately USD 120 million, a year-on-year increase of about 13%.

CRI reports that from 2021 to 2024, major sources of isocyanate imports into Vietnam include China, Japan, and South Korea. Key exporters to Vietnam are WANHUA CHEMICAL (SINGAPORE) PTE LTD, BASF COMPANY LTD, and MITSUI CHEMICALS INC.

The main importers of isocyanates in Vietnam are companies in the chemical industry and distributors, with a predominance of foreign-invested enterprises such as HYOSUNG VIETNAM CO, LTD, BASF VIETNAM CO, LTD, and SAN FANG (VIETNAM) CO, LTD.

Overall, with Vietnam's economic development, rising income levels, expanding consumer market, and progress in manufacturing, the import of isocyanates is expected

to continue growing in the coming years.

Topics covered:

The Import and Export of Isocyanates in Vietnam (2021-2024)

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Total Import Value and Percentage Change of Isocyanates in Vietnam (2021-2024)

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