

Global Glacial Acetic Acid Market 2026

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 10.8 bn
Forecast (2031)	USD 15.1 bn
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	Asia-Pacific · 65.8%
Fastest-growing region	Asia-Pacific · 6.4%
Market concentration	Moderate
Licence	Individual / Company

The global glacial acetic acid market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's integrated acetyl chain and expanding Indian demand for vinyl acetate monomer, purified terephthalic acid and acetate solvents. Vinyl acetate monomer remained the largest application at XX%, while bio-based and low-carbon grades formed the fastest-growing production-route segment. New Chinese and US capacity is reshaping the cost curve, while the September 2026 idling of INEOS's Hull acetyls units increases Europe's structural import dependence.

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Executive summary

The global glacial acetic acid market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's integrated acetyl chain and expanding Indian demand for vinyl acetate monomer, purified terephthalic acid and acetate solvents. Vinyl acetate monomer remained the largest application at XX%, while bio-based and low-carbon grades formed the fastest-growing production-route segment. New Chinese and US capacity is reshaping the cost curve, while the September 2026 idling of INEOS's Hull acetyls units increases Europe's structural import dependence.

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

Key findings

- The global glacial acetic acid market generated USD XXX billion in 2025 on consumption of XXX metric tonnes.
- Market value will reach USD XXX billion by 2031, representing a XX% CAGR from 2025.
- Asia-Pacific controlled XX% of 2025 market value and will grow at a XX% CAGR through 2031.
- Vinyl acetate monomer represented XX% of 2025 demand value, making it the principal outlet for glacial acetic acid.
- Methanol carbonylation supplied XX% of global volume in 2025 because of its feedstock efficiency and suitability for world-scale plants.
- Celanese started a XXX-metric-ton annual acetic acid expansion at Clear Lake in March 2024.
- INEOS reported XXX metric tonnes of annual acetic acid capacity at the end of 2024 across its acetyls network.
- India imported approximately XX% of its annual acetic acid requirement when INEOS and GNFC announced their proposed XXX-metric-ton Bharuch project in November 2024.

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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

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Global Glacial Acetic Acid Market Trends and Growth Drivers

Glacial acetic acid sits at the center of an integrated chemical chain rather than behaving as a standalone solvent market. Producers continuously allocate acid between merchant sales and derivatives according to VAM, PTA, ester and anhydride netbacks, making feedstock integration and downstream flexibility decisive competitive advantages.

The market entered 2026 with a pronounced regional imbalance. China continued to add integrated capacity amid weak coatings and construction demand, North America strengthened its cost position through the Clear Lake expansion, and India remained heavily import-dependent. Europe moved in the opposite direction as high energy costs culminated in the September 2026 idling of INEOS's Hull acetyls complex.

Demand growth remains broad-based despite near-term oversupply. Water-based vinyl polymers, flexible packaging, polyester, sanitation chemistry and high-purity applications expand underlying consumption, while certified low-carbon grades create a separate value pool. The forecast therefore combines steady volume growth with a gradual recovery in industry utilization and a richer product mix.

Growth drivers

VAM and emulsion polymer expansion

Vinyl acetate monomer is the largest outlet for glacial acetic acid and links demand directly to architectural coatings, adhesives, packaging and construction polymers. New VAM and vinyl acetate ethylene capacity in Asia increases captive acid consumption, while renovation and water-based formulation trends strengthen demand intensity in developed markets.

Polyester and PTA capacity growth

Purified terephthalic acid production uses acetic acid as a process solvent, making polyester operating rates an important volume indicator. Capacity additions in China, India and Southeast Asia expand circulating inventories and replacement demand even where solvent-recovery systems limit net consumption per tonne.

Acetate solvent demand in coatings and adhesives

Ethyl, butyl and propyl acetate demand rises with flexible packaging inks, automotive refinishing, industrial coatings and adhesive formulation. Producers integrated from acid into esters can redirect molecules toward the strongest regional netback, supporting utilization and margin resilience.

Indian import substitution

India's dependence on imports creates a strong investment case for domestic carbonylation capacity and associated VAM, ester and pharmaceutical chains. The proposed INEOS-GNFC plant would shorten supply lines, reduce exposure to seaborne volatility and unlock downstream projects requiring reliable local feedstock.

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Peracetic acid and high-purity demand

Peracetic acid consumption is expanding in food sanitation, healthcare, aseptic packaging and industrial water treatment. Pharmaceutical, food and electronic buyers also pay for documented purity, traceability and controlled metals, creating value growth above commodity volume growth.

Low-carbon acetyl commercialization

Mass-balance products incorporating captured-carbon or renewable methanol allow coatings, adhesives and packaging customers to reduce value-chain emissions without reformulating production. Celanese's ECO-CC commercialization, INEOS's hydrogen investment and Lenzing's bio-based supply demonstrate the emergence of a differentiated premium tier.

Restraints

Chinese capacity surplus

Large carbonylation projects and integrated acetate investments are increasing supply faster than near-term Chinese downstream demand. Export competition compresses regional spreads, lowers marginal-plant utilization and delays investment outside cost-advantaged locations.

Methanol and energy volatility

Methanol is the principal variable feedstock for modern acetic acid production, while natural gas and power influence methanol, carbon monoxide and utility costs. Producers without integration or formula-based contracts face rapid margin compression when feedstock movements cannot be passed through.

European industrial contraction

Weak construction, coatings and chemical operating rates reduce regional acid and derivative demand, while elevated energy costs undermine domestic production economics. The Hull idling deepens import dependence but also signals that demand recovery must precede a sustained European production restart.

Hazardous logistics burden

Glacial acetic acid is corrosive and flammable, requiring compatible tanks, controlled loading systems, trained personnel and regulated dangerous-goods transport. These requirements raise delivered costs for small and remote customers and favor established distributors with dedicated infrastructure.

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Glacial Acetic Acid Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
VAM and emulsion polymer expansion	XXX	XXX	XXX
Polyester and PTA capacity growth	XXX	XXX	XXX
Acetate solvent demand in coatings and adhesives	XXX	XXX	XXX
Indian import substitution	XXX	XXX	XXX
Peracetic acid and high-purity demand	XXX	XXX	XXX
Low-carbon acetyl commercialization	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Chinese capacity surplus	XXX	XXX	XXX
Methanol and energy volatility	XXX	XXX	XXX
European industrial contraction	XXX	XXX	XXX
Hazardous logistics burden	XXX	XXX	XXX

Source: XXX

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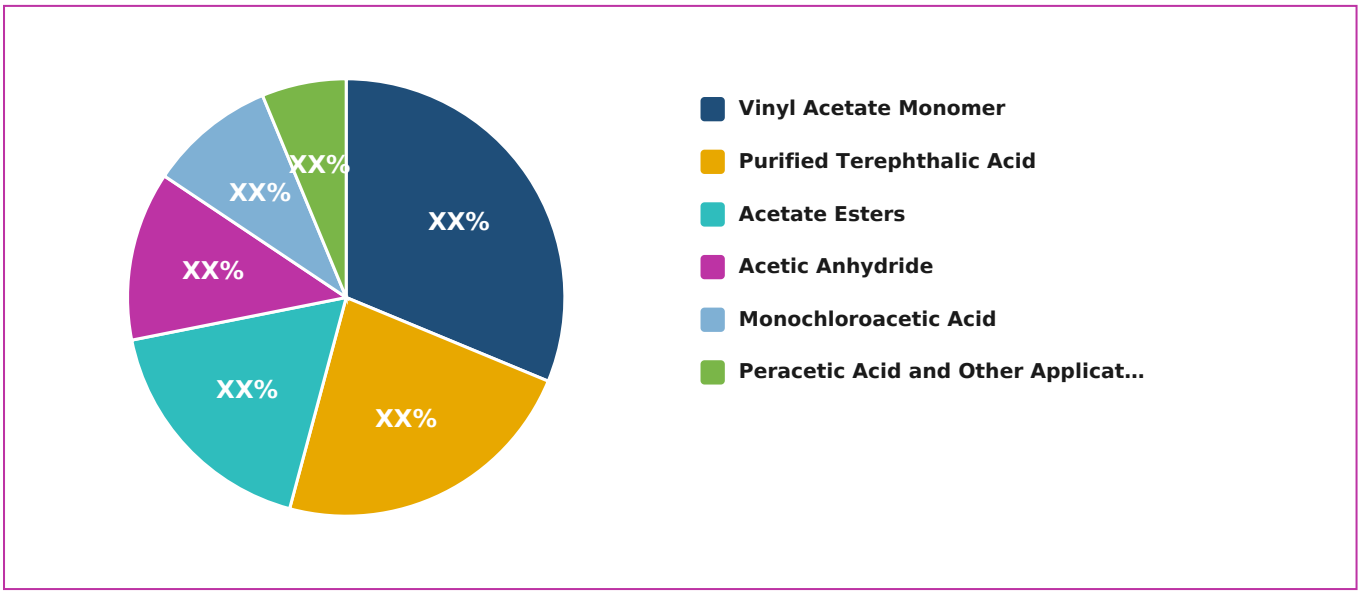
Glacial Acetic Acid Market Segmentation by Application, Grade and Route

By Application

VAM is the anchor outlet because glacial acetic acid is a core input for polyvinyl acetate, vinyl acetate ethylene and ethylene-vinyl acetate chains used in coatings, adhesives and packaging. PTA processing is the second-largest demand pool, although high solvent-recovery rates moderate net consumption. Peracetic acid, pharmaceutical processing and electronic uses grow faster from a smaller base as sanitation and purity requirements increase.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Vinyl Acetate Monomer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Purified Terephthalic Acid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Acetate Esters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Acetic Anhydride	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Monochloroacetic Acid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Peracetic Acid and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

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Industrial material dominates bulk conversion into VAM, PTA, esters and anhydride, where consistent water and impurity control matter more than specialty certification. Food and pharmaceutical grades command higher prices through quality documentation and traceability. Electronic and ultra-high-purity grades expand fastest as semiconductor and advanced-material processes tighten limits for metals, aldehydes and non-volatile residue.

Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Electronic and Ultra-high-purity Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production Route

Methanol carbonylation dominates through high conversion efficiency, mature catalyst systems and the scale economics of integrated methanol and carbon-monoxide supply. Oxidation routes remain relevant at selected integrated sites but lose share against modern carbonylation units. Bio-based and circular-carbon routes grow rapidly as customers pursue lower Scope 3 emissions, though available volumes remain limited.

Value by production Route, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Methanol Carbonylation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Acetaldehyde and Hydrocarbon Oxidation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bio-based and Circular-carbon Routes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End-use Industry

Paints, coatings and adhesives lead through their exposure to VAM emulsions and acetate solvents. Textiles and polyester consume acid through PTA and cellulose-acetate value chains, while plastics and packaging draw on VAM, EVA and printing-ink solvents. Healthcare, pharmaceuticals and sanitation outpace the market as peracetic acid disinfection and regulated processing applications expand.

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Value by end-use Industry, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Paints, Coatings and Adhesives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textiles and Polyester	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Plastics and Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Construction Materials	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and Beverage Processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Healthcare, Pharmaceuticals and Sanitation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Industrial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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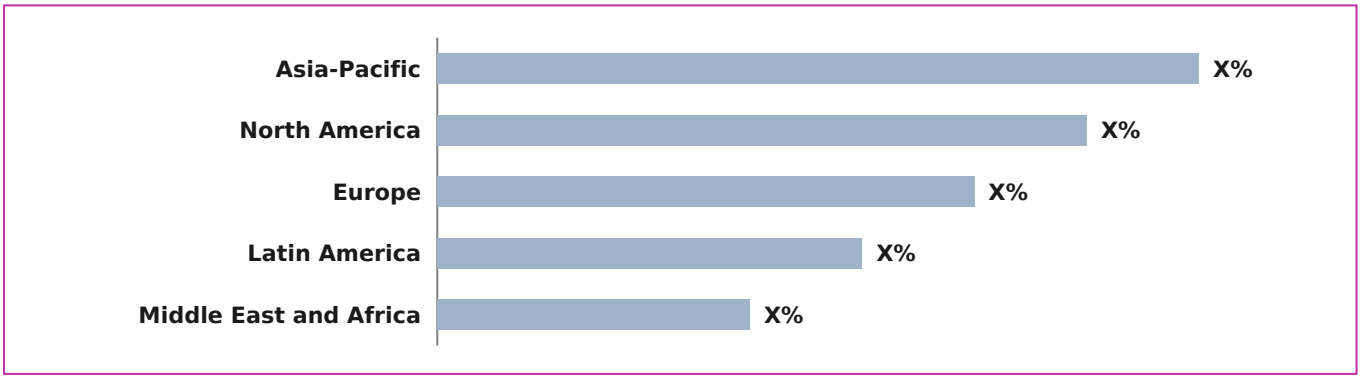
Glacial Acetic Acid Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of 2025 market value and remains both the largest and fastest-growing region, with a XX% CAGR through 2031. China dominates regional capacity through coal- and methanol-integrated carbonylation complexes connected to VAM, PTA and acetate solvents. The 2025 commissioning of Handsome Chemical's XXX-metric-ton Jingmen unit reinforces China's export capability and intensifies competition among non-integrated producers.

India provides the clearest structural growth story. Domestic demand is rising across paints, pharmaceuticals, flexible packaging, textiles and polyester, while the country imported approximately XX% of its requirement when INEOS and GNFC announced their proposed XXX-metric-ton Bharuch plant. Japan and South Korea remain mature but technically demanding markets, with growth concentrated in specialty polymers, electronics and high-purity grades; Southeast Asia benefits from manufacturing relocation and new coatings, packaging and polyester investment.

North America holds XX% of global value and is anchored by advantaged US Gulf Coast production, including Celanese's XXX-metric-ton Clear Lake expansion and INEOS's XXX-metric-ton Texas City asset. Europe accounts for XX% and faces a decisive supply reset after INEOS announced the September 2026 idling of its Hull acetyls units. Latin America and the Middle East and Africa remain smaller but expand through imported acid, local ester conversion, food processing, coatings and water-treatment applications.

Growth rate by region, 2025-2031



Source: XXX

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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

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Glacial Acetic Acid Market Competitive Landscape and Company Share

The market is moderately concentrated at the global level but fragmented within China. Celanese and INEOS operate multi-region acetyl platforms with proprietary process technology, integrated feedstocks and the ability to optimize molecules between merchant acetic acid and derivatives. Jiangsu SOPO, Shanghai Huayi, Yankuang Lunan, Kingboard and other Chinese groups exert increasing influence on the marginal cost curve and seaborne Asian pricing.

Competition is shifting from pure nameplate scale toward feedstock position, downstream optionality, logistics reliability and carbon intensity. Celanese's Clear Lake expansion added XXX metric tonnes of annual capacity, while INEOS consolidated its Americas position through the Texas City acquisition and pursued Indian localization with GNFC. Handsome Chemical's Jingmen project combines XXX metric tonnes of acid capacity with an equally sized new acetate line, illustrating the economic advantage of integrated conversion.

Strategic direction diverges by region. North American producers are prioritizing low-cost Gulf Coast output and formula-linked contracts; Chinese producers are adding integrated capacity and pursuing exports; Indian participants are seeking import substitution; and European suppliers are rationalizing high-energy-cost assets while developing low-carbon products. The strongest returns will accrue to businesses able to maintain high utilization without forcing commodity volumes into oversupplied spot markets.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Celanese Corporation	XXX	XXX	XXX	XXX
INEOS Acetyls	XXX	XXX	XXX	XXX
Jiangsu SOPO Chemical Co., Ltd.	XXX	XXX	XXX	XXX
Shanghai Huayi Energy Chemical Co., Ltd.	XXX	XXX	XXX	XXX
Kingboard Holdings Limited	XXX	XXX	XXX	XXX
Daicel Corporation	XXX	XXX	XXX	XXX
Gujarat Narmada Valley Fertilizers & Chemicals Limited	XXX	XXX	XXX	XXX
Sipchem	XXX	XXX	XXX	XXX
Lenzing AG	XXX	XXX	XXX	XXX
Handsome Chemical Development Limited	XXX	XXX	XXX	XXX

Source: XXX

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Glacial Acetic Acid Market Forecast and Investment Opportunities

Global consumption will increase from XXX metric tonnes in 2025 to XXX metric tonnes in 2031. Volume expands at XX% annually, while market value grows at XX% as utilization normalizes, feedstock costs pass through and higher-purity and low-carbon grades gain mix. Asia-Pacific contributes more than three-quarters of incremental volume.

The base case assumes Chinese capacity growth moderates after the current project wave, Western coatings and construction demand recovers gradually, and the proposed Indian capacity enters during the latter forecast period. A stronger construction and packaging cycle would tighten VAM and ester balances earlier, while persistent Chinese oversupply would hold global value growth below volume-plus-price normalization expectations.

Commercial winners will secure methanol and carbon-monoxide economics, integrate into derivatives, use contractual pricing to manage volatility and certify lower-carbon supply. Import infrastructure becomes increasingly strategic in Europe and India, while specialty distributors gain attractive positions in food, pharmaceutical, electronic and peracetic-acid applications requiring smaller lots and stronger documentation.

Opportunities

- Localized acetic acid production and downstream integration in India
- Certified low-carbon acetic acid produced from captured carbon dioxide or renewable feedstocks
- Electronic and pharmaceutical grades with tighter impurity specifications
- Peracetic acid supply chains serving food sanitation, healthcare and water treatment
- European import terminals, storage capacity and long-term supply contracts
- Digital optimization of integrated acetyl production and molecule allocation

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