

India Organic Chemical Industry Outlook to 2019 - Driven by Consumer Preferences and Integrated Production of Chemicals

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Abstracts

The report titled “India Organic Chemical Industry Outlook to 2019 - Driven by Consumer Preferences and Integrated Production of Chemicals” provides a comprehensive analysis of the various aspects such as market size of the overall organic chemical market with a focus on methanol and phenol markets. The market is further segmented into consumption and production, end user industry analysis, import and export and competitive landscape of the major players operating in methanol and phenol market. Investment opportunities, recent trends, drivers and macro economy factors have also been discussed in the market intelligence.

In India, six major organic chemicals, namely, Methanol, Aniline, Alkyl Amines and its derivatives like Formaldehyde, Acetic Acid and Phenol, have contributed a major proportion to the domestic Organic Chemical industry. The production of organic chemicals market has increased marginally at a CAGR of 3.8% over the years during FY'2009-FY'2014. This growth has been registered also on account of abolishment of Industrial Licensing for various sub sectors except the hazardous chemicals and reduction in the list of reserved chemical items for the production in small scale sector. The production of methanol market has grown from ~TMT in FY'2009 to ~TMT in FY'2014 whereas phenol market has inclined from ~TMT to ~TMT during the same time period. With the increase in capacity utilization by major players in the industry, the production increased by ~% compared to ~TMT in FY'2013.

Poor infrastructure, high cost of feedstock and under-utilization of installed capacities have acted as a major hurdle in the achievement of optimum operational capacities of plant and machinery. Ensuring feedstock availability, stringent government regulations against cheap imports, skilled manpower and innovating new applications of organic

chemicals are the major factors that would drive the growth of this market in the next five years.

The consumption of phenol in India has increased at a CAGR of 9.3% from ~ TMT in FY'2009 to ~TMT in FY'2014 whereas phenol production has declined at a CAGR of ~% from FY'2009 to FY'2014. The huge demand-supply gap was bridged through cheap imports from other Asian countries as they had increased their production capacities to ~ million/year in FY'2014. The imports grew at a CAGR of ~% from FY'2009 to FY'2014. Major producers of Phenol in India were Hindustan Organic Chemical Limited and SI Group. The demand of phenol is expected to increase overtime due to increasing demand of bisphenol-A, formaldehyde and Caprolactum. The India phenol production was expected to remain stagnant due to no expected domestic supply additions in nearby future.

The India methanol market has been an import driven as domestic production has not been sufficient to cater domestic requirement. The local production of methanol has inclined at the CAGR of FY'2009 FY'2014. Hence, the amount of imports of methanol in India bolstered at a CAGR of 22.1% during the review period. The wide application base of methanol has triggered its import to India.

Gujarat Narmada Fertilizers Corporation was the largest producer of methanol in India in FY'2014 with a capacity of ~ kt per annum and generated the revenues of INR ~ million in FY'2014 followed by Rashtriya Chemicals and Fertilizers Limited with INR ~ million in FY'2014.

The growth in India Organic Chemical Market plays a pivotal role in supporting the expansion of other industries in India. The production in organic chemical industry has witnessed growth at a CAGR of ~% during the period FY'2009-FY'2014. Owing to this sizeable growth, the Organic Chemical Industry has been one of the fastest growing Industries in India. Organic chemicals are extensively used in water treatment chemicals, construction, personal care products and automotive sector.

It is quite evident that most successful players in the chemical industry are likely to be the ones who manage to adapt early to the upcoming changes and by doing so, will maintain their competitive advantage. These changes will correspond to the changes in feedstock, technology and market selling in the upcoming years. Indian players are expected to increase their production with the establishment of new PCPIR, increasing government expenditure on Infrastructure and hardworking workforce. On combining the factors of smooth growth with the entrepreneurial spirit, social and political

responsibility and a forward looking understanding of the future framework provides a fruitful outlook for India Organic Chemical Industry. Production in the organic chemical market in India is expected to expand to ~ TMT by FY'2019, growing at a CAGR of ~% from FY'2015 - FY'2019.

Key Topics Covered in the Report:

The market size of the organic chemical industry.

Market segmentation of the organic chemical industry on the basis of phenol and methanol.

The methanol market by production and consumption.

The phenol market by production and consumption.

Trends and Development in the organic chemical industry.

Investment opportunities in India organic chemical industry.

Competitive landscape and detailed company profiles of the major manufacturers of methanol and phenol in India.

Future outlook and projections of the India organic chemical industry on the basis of production and consumption in volume terms in the India.

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