

India Surfactants Market Assessment, By Type [Anionic, Non-Ionic, Cationic, Amphoteric, Others], By Functionality [Surface Modification, Emulsification, Foaming, Dispersion, Others], By End-user [Pharmaceuticals, Cosmetics, Household & Industrial Cleaning, Textile, Elastomers & plastics, Food & Beverages, Agrochemicals, Oilfield, Paints & Coatings, Others], By Region, Opportunities and Forecast, FY2017-FY2031F

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Abstracts

India surfactants market size was valued at USD 2.48 billion in FY2023, which is expected to grow to USD 5.05 billion in FY2031, with a CAGR of 9.3% during the forecast period between FY2024 and FY2031. The pharmaceutical industry plays a pivotal role in the surfactant market in India. Surfactants are essential components in various pharmaceutical formulations, aiding in drug solubility, dispersion, and emulsification. With the healthcare sector continuously evolving and expanding, the demand for surfactants in pharmaceutical applications is expected to remain strong.

The growing demand for personal and home care products significantly fuels the market. The increasing awareness of personal hygiene and grooming, coupled with rising disposable incomes, leads to a higher demand for items such as shampoos, soaps, detergents, and skincare products, which are integral applications of surfactants. Another significant driver is the agricultural sector, which utilizes surfactants in agrochemical formulations. The need to enhance the effectiveness and efficiency of pesticides and herbicides propels the demand for surfactants. Furthermore, the industrial and manufacturing sectors are crucial in driving the surfactant market.

Industries such as textile heavily rely on surfactants for various processes, including emulsification, wetting, dispersing, and foaming. The growth of these industries directly translates into an increased demand for surfactants in the country.

Rise in Oil Exploration in India to Augment Growth Across the Market

The surging emphasis on oil exploration onshore and offshore significantly propels the demand for surfactants in India. These unique chemical compounds are pivotal in enhancing the efficiency and success of oil exploration and extraction activities. In the realm of offshore oil exploration, surfactants prove indispensable where reserves lie beneath the seabed in challenging and corrosive environments. It caters to various crucial issues in the exploration process.

Surfactants are essential in drilling fluids, aiding in friction reduction and lubrication, thus ensuring smooth drilling operations even under challenging offshore conditions. Additionally, they play a vital role in subsea operations, facilitating the seamless flow of oil and gas through pipelines and equipment.

For instance, to alleviate the growing strain of oil imports, India during 2022 initiated the bidding process for 26 oil exploration blocks within the country. The onshore and offshore exploration increase is expected to drive the demand for surfactants in India.

Pharmaceutical Manufacturing in India Create Traction

The pharmaceutical industry significantly drives the demand for surfactants in India. Surfactants are crucial in various pharmaceutical formulations and processes, influencing drug efficacy, stability, and delivery. The various applications of surfactants in the pharmaceutical industry underscores their critical role in enhancing the efficacy, stability, and delivery of a wide array of medications, making them an integral component of the pharmaceutical manufacturing process in India.

For instance, India holds a substantial share of approximately 60% of the world's vaccine demand, establishing itself as a major supplier of crucial vaccines such as DPT, BCG, and Measles. Moreover, India plays a significant role in the global healthcare landscape by providing approximately 70% of the vaccines outlined in the World Health Organization's essential Immunization schedule. The strong export demand, coupled with the high domestic demand for pharmaceuticals, is expected to drive the requirement for surfactants in the Indian Pharmaceutical sector.

Rising Demand for Personal Care in the Indian Market

The rising awareness regarding personal hygiene and grooming and increased disposable income have led to a significant demand surge for various personal care products. These encompass an extensive range, including shampoos, soaps, shower gels, and skincare items, crucial for maintaining cleanliness, health, and an enhanced quality of life. As surfactants are indispensable raw material, they play multifaceted roles. Additionally, surfactants facilitate emulsification and stabilization of different product components, ensuring homogeneity and optimal texture.

For instance, India's beauty market has reached USD 15.6 billion in 2022, compared to USD 12.3 billion in 2018. The robust growth of this sector in India is expected to continue, further strengthening the demand for surfactants in the country.

Impact of COVID-19

In India, the surfactants market experienced significant impacts attributable to the COVID-19 pandemic. A rise in demand for cleaning and disinfecting products was observed, where surfactants played a significant role. Consumer preferences swiftly shifted towards products that emphasized hygiene, accentuating the necessity for highly effective surfactants. However, the Indian market faced disruptions due to supply chain challenges and operational limitations at manufacturing facilities. This was coupled with reduced demand from sectors like paints & coatings, textile, and others. Throughout the pandemic, there was a notable surge in research in India to enhance surfactants' antiviral properties. Manufacturers prioritized innovation in surfactant-based products, focusing on their effectiveness in combatting various viruses.

Impact of Russia-Ukraine War

The repercussions of the Russia-Ukraine war were evident in the upstream segment of the surfactants market in India. The instability in crude oil prices due to the conflict in Eastern Europe has influenced the production costs feedstocks such as benzene, ethylene, n-paraffin, and kerosene. Due to sanctions imposed by various European nations, India capitalized on discounted crude purchases from Russia. This strategic procurement alleviated manufacturing costs for surfactants in India to a certain extent as the petrochemical stocks eased.

However, the erratic fluctuations in crude oil prices induced by the Eastern European conflict resulted in considerable fluctuations in the production landscape of surfactants

in India. It, in turn, had substantial impacts on manufacturers and consumers alike within the surfactants market in India.

Key Players Landscape and Outlook

Major surfactant manufacturers actively focus on developing novel commodities with specific functions to solidify their position in the market. By innovating and diversifying their product offerings, these companies aim to cater to evolving consumer needs, industry requirements, and sustainability goals.

For instance, BASF introduced a biosurfactant called Plantopon Soy in March 2022, a product crafted from renewable resources, notably coconut oil. This innovative surfactant falls under the category of anionic surfactants and is derived from non-GMO soybeans, specifically a protein derivative.

Contents

1. RESEARCH METHODOLOGY

2. PROJECT SCOPE & DEFINITIONS

3. IMPACT OF COVID-19 ON INDIA SURFACTANTS MARKET

4. IMPACT OF RUSSIA-UKRAINE WAR

5. EXECUTIVE SUMMARY

6. VOICE OF CUSTOMER

6.1. Market Awareness and Product Information

6.2. Brand Awareness and Loyalty

6.3. Factors Considered in Purchase Decision

6.3.1. Brand Name

6.3.2. Quality

6.3.3. Quantity

6.3.4. Price

6.3.5. Product Specification

6.3.6. Application Specification

6.3.7. VOC/Toxicity Content

6.3.8. Availability of Product

6.4. Frequency of Purchase

6.5. Medium of Purchase

7. INDIA SURFACTANTS MARKET OUTLOOK, FY2017-FY2031

7.1. Market Size & Forecast

7.1.1. By Value

7.1.2. By Volume

7.2. By Type

7.2.1. Anionic

7.2.2. Non-Ionic

7.2.3. Cationic

7.2.4. Amphoteric

7.2.5. Others

7.3. By Functionality

7.3.1. Surface modification

7.3.2. Emulsification

7.3.3. Foaming

7.3.4. Dispersion

7.3.5. Others

7.4. By End-user

7.4.1. Pharmaceuticals

7.4.2. Cosmetics

7.4.3. Household & Industrial Cleaning

7.4.4. Textile

7.4.5. Elastomers & plastics

7.4.6. Food & Beverages

7.4.7. Agrochemicals

7.4.8. Oilfield

7.4.9. Paints & Coatings

7.4.10. Others

7.5. By Region

7.5.1. North

7.5.2. East

7.5.3. West

7.5.4. Central

7.5.5. South

8. SUPPLY SIDE ANALYSIS

8.1. Capacity, By Company

8.2. Production, By Company

8.3. Operating Efficiency, By Company

8.4. Key Plant Locations (Up to 25)

9. MARKET MAPPING, FY2023

9.1. By Type

9.2. By Functionality

9.3. By End-user

9.4. By Region

10. MACRO ENVIRONMENT AND INDUSTRY STRUCTURE

- 10.1. Supply Demand Analysis
- 10.2. Import Export Analysis – Volume and Value
- 10.3. Supply/Value Chain Analysis
- 10.4. PESTEL Analysis
 - 10.4.1. Political Factors
 - 10.4.2. Economic System
 - 10.4.3. Social Implications
 - 10.4.4. Technological Advancements
 - 10.4.5. Environmental Impacts
 - 10.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 10.5. Porter's Five Forces Analysis
 - 10.5.1. Supplier Power
 - 10.5.2. Buyer Power
 - 10.5.3. Substitution Threat
 - 10.5.4. Threat from New Entrant
 - 10.5.5. Competitive Rivalry

11. MARKET DYNAMICS

- 11.1. Growth Drivers
- 11.2. Growth Inhibitors (Challenges, Restraints)

12. KEY PLAYERS LANDSCAPE

- 12.1. Competition Matrix of Top Five Market Leaders
- 12.2. Market Revenue Analysis of Top Five Market Leaders (in %, FY2023)
- 12.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
- 12.4. SWOT Analysis (For Five Market Players)
- 12.5. Patent Analysis (If Applicable)

13. PRICING ANALYSIS

14. CASE STUDIES

15. KEY PLAYERS OUTLOOK

- 15.1. BASF India Ltd
 - 15.1.1. Company Details

- 15.1.2. Key Management Personnel
 - 15.1.3. Products & Services
 - 15.1.4. Financials (As reported)
 - 15.1.5. Key Market Focus & Geographical Presence
 - 15.1.6. Recent Developments
 - 15.2. Dow Chemical International Private Limited
 - 15.3. Solvay Specialities India Private Limited
 - 15.4. Huntsman International (India) Private Limited
 - 15.5. Galaxy Surfactants Ltd
 - 15.6. Matangi Industries LLP
 - 15.7. Heubach Colorants India Limited
 - 15.8. Saibaba Surfactants Pvt Ltd
 - 15.9. Venus Ethoxyethers Pvt Ltd.
 - 15.10. Otto Chemie Pvt Ltd
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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