

Petrochemical Market in India 2021

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Abstracts

Petrochemical includes hydrocarbons derived from the downstream processing of crude oil and natural gas. It has extensive usage in several industries, such as agriculture, automotive, construction, plastic, packaging, and personal care. In terms of volume, the petrochemical market in India stood at 42.50 Mn Tons and is estimated to reach 49.62 Mn Tons by 2025. It will expand at a compound annual growth rate (CAGR) of ~6.14% between FY 2021 and FY 2025.

Segment insights:

The petrochemical market in India may be segmented into three divisions – basic petrochemicals, intermediates, and other petro-based chemicals. The basic petrochemicals segment dominated the market, accounting for ~45.53% of the share of the market volume in FY 2020. Basic petrochemicals include polymers, synthetic fibers, synthetic rubber, synthetic detergent intermediates, and performance plastics.

Intermediates appeared to be the second-leading segment in FY 2020, followed by other petro-based chemicals. The increasing consumption of high-density polyethylene (HDPE), linear low-density polyethylene (LDPE), polypropylene, and polyvinyl chloride is expected to attribute to the growth of the basic petrochemicals segment.

Production insights:

The production of petrochemicals in India grew at a steady rate over the past few years. In FY 2019, the intermediates segment dominated the petrochemical production, accounting for 50.8% of the production volume. According to the Department of Chemicals and Petrochemicals (DCPC), India had 11 feed cracker complexes for petrochemical production as of FY 2020.

Impact of COVID-19:

The pandemic has hampered the growth momentum of the petrochemical market in India, disrupting the supply chain along with weakening the demand. However, the level of impact and the recovery trajectory have been different across the petrochemical value chain. The supply of petrochemical has majorly been affected owing to labor shortage, logistical challenges, low utilization rates, and the reduction in operational expenses.

The petrochemical market witnessed a notable change in its consumption pattern amid the pandemic. Industries, such as the automotive, construction, electronics, textiles, and rigid packaging experienced a sudden slump in demand. On the other hand, the demand for petrochemicals from flexible packaging, personal care, and healthcare has risen sharply. The pandemic is expected to bring about various changes in the India petrochemical market, including digitization, increased consolidation activities, and a focus on scenario-based planning.

Companies covered:

Bharat Petroleum Corporation Limited

Hindustan Petroleum Corporation Limited

Indian Oil Corporation Limited

Mangalore Refinery and Petrochemicals Limited

Reliance Industries Limited

Brahmaputra Cracker and Polymer Limited

Haldia Petrochemicals Limited

HPCL-Mittal Energy Limited

Nayara Energy Limited

ONGC Petro additions Limited

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Note: Financial information covered only for public companies

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