

India Diethylene Glycol (DEG) Market By Application (Plasticizer, Solvent {Printing Inks, Paint Pigments, and Dye Formation}, Polyester Resin, Chemical Intermediate {Unsaturated Resin, Thermoplastic Polyurethanes, Polyester Polyols, PEG, TriEG, TetraEG, Emulsifiers, and Morpholine}, Freezing Point Depressant {Antifreeze Coolant and Heat Transfer Fluids}, Lubricant {Glass Cement Grinding, Polishes, and Mold Release Agents}, Dehydrant, Brake Fluids, Cosmetic & Personal Care, and Others), By End User Industry (Plastic Industry, Paints and Coatings, Automotive, Agrochemical, Oil and Gas, Cement, Textiles, Cosmetic and Personal Care, and Others) By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

India Diethylene Glycol (DEG) Market achieved a total market volume of 165.41 thousand Metric Tonnes in 2024 and is poised for strong growth in the forecast period to reach 207.31 thousand Metric Tonnes, with a projected Compound Annual Growth Rate (CAGR) of 3.87% through 2030.

The Diethylene Glycol (DEG) market in India is poised for remarkable growth, reflecting the nation's ascent in the global chemical industry. DEG, a crucial chemical compound

with a wide range of applications, is indispensable in sectors such as textiles, automotive, pharmaceuticals, and more. The DEG market in India has witnessed a substantial transformation over the years. Historically, it primarily served domestic demand, supporting industries such as textiles and pharmaceuticals. However, with increasing industrialization and globalization, the market has expanded significantly. Today, India not only consumes DEG but also plays a pivotal role in its production, solidifying its position in the global chemical industry.

The Indian DEG market has evolved into a significant contributor to the country's chemical industry. Prominent players in this market include Reliance Industries, SRF Limited, INEOS, and Shell, actively shaping market dynamics. Reliance Industries, in particular, is a key player and holds a substantial presence in the DEG market. DEG's versatile properties render it an essential component in various sectors. It finds applications in the production of resins, plasticizers, and coolants. The textiles and automotive industries rely heavily on DEG, using it for processes like glycol dehydration and antifreeze formulations. Additionally, it is used in the pharmaceutical sector for the manufacture of medications. Several factors contribute to the burgeoning demand for DEG in India. The textile industry's growth fuels the need for DEG, as it is vital for moisture management in textiles. The automotive sector's expansion relies on DEG for antifreeze formulations, ensuring the smooth operation of vehicles.

While the DEG market in India displays tremendous potential, it also faces notable challenges. Price fluctuations of raw materials, environmental regulations, and the demand for sustainability are key challenges. The price volatility of raw materials, primarily ethylene oxide, can impact production costs. Compliance with stringent environmental regulations and an increased focus on eco-friendly practices are pushing the industry to adopt cleaner production methods.

As environmental consciousness grows, regulations concerning emissions and waste disposal have become stricter. The DEG industry in India is responding by adopting eco-friendly production processes, focusing on reducing emissions, and improving waste management. These measures not only align with regulatory requirements but also contribute to global sustainability goals. The Indian DEG market is witnessing several notable trends. Manufacturers are exploring the potential of producing biobased DEG, reducing the carbon footprint of the chemical. Additionally, there is a growing emphasis on research and development to enhance the performance and eco-friendliness of DEG-based products.

The outlook for the Diethylene Glycol market in India is highly promising. With continued

growth in industries that rely on DEG, including textiles, automotive, and pharmaceuticals, the demand for this chemical is expected to remain robust. The industry's adaptability to changing market dynamics, regulatory requirements, and environmental consciousness will play a crucial role in shaping its growth trajectory.

The Diethylene Glycol market in India offers a compelling narrative of growth, transformation, and adaptation. Its diverse applications across various sectors make it a critical chemical in the country's industrial landscape. As the market confronts challenges and embraces sustainability, it is well-positioned to meet not only domestic demand but also to make substantial contributions to the global chemical industry. India's journey in the DEG market is a testament to its resilience, innovation, and commitment to sustainable practices. The Diethylene Glycol market in India is set for growth, driven by diverse applications, expanding end-use industries, and a growing focus on sustainability. This versatile chemical is poised to play a significant role in India's chemical sector, offering substantial growth opportunities and contributing to global sustainability goals.

Key Market Drivers

Rising Automotive Industry is expected to Propel Indian Diethylene Glycol (DEG) Market Growth

The Indian Diethylene Glycol (DEG) market is poised for significant growth, largely driven by the rising automotive industry in the country. Diethylene Glycol, a versatile chemical compound with diverse applications, plays a pivotal role in the automotive sector, serving as a crucial component in various processes and products. The expanding influence of the automotive industry on the demand for DEG is expected to propel market growth and contribute to India's economic development.

The automotive sector in India is currently experiencing rapid expansion, driven by a combination of factors including increasing disposable incomes, a growing middle class, and the government's push for electric and sustainable mobility. Diethylene Glycol is a key player in this sector, as it is widely used in the formulation of engine coolant and antifreeze solutions. These coolants are essential for maintaining the temperature and performance of internal combustion engines and electric vehicle battery systems. As India's automotive manufacturing sector and electric vehicle market continue to grow, the demand for engine coolant and antifreeze solutions containing DEG is projected to witness robust expansion. Diethylene Glycol serves as a crucial ingredient in the production of brake fluids. Brake fluids are integral to the safe and efficient operation of

vehicles, as they transmit the force applied to the brake pedal to the brake system. DEG's properties make it an ideal choice for formulating high-performance brake fluids that ensure reliable stopping power and safety on the road. As the automotive industry places a strong emphasis on safety and performance, the demand for brake fluids containing DEG is expected to surge.

DEG plays a significant role in the manufacturing of air conditioning systems in vehicles. It is used as a refrigerant in air conditioning systems to regulate the temperature inside the vehicle's cabin. With India's hot and tropical climate, the demand for efficient and reliable air conditioning in vehicles is substantial. This drives the need for air conditioning systems that rely on DEG as a refrigerant. Diethylene Glycol is employed in the production of electrical connectors and wiring harnesses in vehicles. These components are essential for the transmission of electrical signals and power throughout the vehicle's various systems. DEG's properties, including its ability to prevent freezing and ensure electrical conductivity, make it an ideal choice for the production of these crucial components. As the automotive industry continues to integrate advanced electronic systems and technologies in vehicles, the demand for electrical connectors and wiring harnesses containing DEG is expected to grow. As the automotive industry in India continues to flourish, the Diethylene Glycol market is well-positioned for growth. Its versatile applications in engine coolants, brake fluids, air conditioning systems, and electrical components highlight its significance and wide-ranging applications in the automotive sector. The increasing need for safe, reliable, and high-performance vehicles, combined with the growing adoption of electric and sustainable mobility solutions, is projected to drive the demand for Diethylene Glycol. This growth not only benefits the chemical industry but also plays a crucial role in supporting the broader economy by catering to the needs of an expanding automotive sector, pivotal for India's progress and modernization.

Growing Demand from the Polyester Resins and Polyurethanes Industries Propels India's Diethylene Glycol (DEG) Market Growth

The Indian Diethylene Glycol (DEG) market is experiencing robust growth, primarily driven by the increasing demand from the polyester resins and polyurethanes industries. Diethylene Glycol, a versatile chemical compound with diverse applications, plays a pivotal role in these sectors, serving as a crucial component in various processes and products. The expanding influence of the polyester resins and polyurethanes industries on the demand for DEG is expected to propel market growth and contribute to India's economic development.

The polyester resins industry in India is witnessing remarkable growth, driven by factors such as construction and infrastructure development, increasing urbanization, and a surge in manufacturing activities. Diethylene Glycol is a vital component in this sector, as it serves as a key raw material in the production of unsaturated polyester resins (UPRs). UPRs are widely used in the manufacture of composite materials, including fiberglass-reinforced plastics, boat hulls, automotive parts, and various construction components. The increasing need for high-strength, durable, and lightweight materials in India's construction and manufacturing sectors has led to a rising demand for UPRs, which, in turn, fuels the demand for DEG as a crucial precursor.

Polyurethanes, on the other hand, represent another significant sector where Diethylene Glycol plays a pivotal role. Polyurethane foams and elastomers are widely used in various applications, including furniture, mattresses, insulation materials, and automotive components. DEG is used as a component in the production of polyurethane systems, such as rigid foams and flexible foams, enhancing their properties and performance. As India's construction industry expands and the demand for energy-efficient insulation materials grows, the polyurethanes sector is expected to witness increased demand, driving the need for DEG. Diethylene Glycol also serves as a critical ingredient in the production of coolants and antifreeze solutions for various industrial and automotive applications. These solutions are essential for maintaining the temperature and performance of machinery, engines, and other mechanical systems. The growth of industrial manufacturing and the automotive industry in India has contributed to the rising demand for these cooling solutions, leading to increased consumption of DEG. DEG is employed in the production of high-quality paints and coatings. It enhances the viscosity and flow characteristics of paints, contributing to their smooth application and durability. The construction and automotive sectors in India, which have been experiencing substantial growth, rely on these high-performance coatings for aesthetic appeal and protection against environmental factors. This has increased the demand for Diethylene Glycol in the paints and coatings industry.

As the polyester resins and polyurethanes industries continue to thrive in India, the Diethylene Glycol market is poised for substantial growth. Its diverse applications in the production of UPRs, polyurethane systems, coolants, and high-performance coatings underscore its significance and wide-ranging uses in these sectors. The increasing need for durable and efficient materials in construction, manufacturing, and other industries, coupled with the growth of India's automotive and industrial sectors, is expected to drive the demand for Diethylene Glycol. This growth not only benefits the chemical industry but also contributes to India's economic development by supporting sectors that are pivotal for the nation's progress and industrial diversification.

Growing Demand from Textile Industry is Propelling the India Diethylene Glycol (DEG) Market Growth

The Indian Diethylene Glycol (DEG) market is experiencing significant growth, primarily driven by the growing demand from the textile industry. Diethylene Glycol, a versatile chemical compound with diverse applications, plays a pivotal role in the textile sector, serving as a crucial component in various processes and products. The expanding influence of the textile industry on the demand for DEG is expected to propel market growth and contribute to India's economic development.

The textile industry in India is witnessing remarkable growth, driven by factors such as increasing population, rising disposable incomes, and the country's position as a global textile manufacturing hub. Diethylene Glycol is a vital component in this sector, serving as a key raw material in the production of polyester fibers and yarns. Polyester is one of the most widely used synthetic fibers in the textile industry, and DEG is an essential ingredient in the polymerization process that produces polyester fibers. The increasing demand for polyester textiles, which are valued for their durability, affordability, and versatility, has led to a surge in the demand for DEG as a key precursor. DEG is used in the production of cooling solutions for the textile industry. These solutions are essential for maintaining the temperature and performance of machinery and equipment used in various textile manufacturing processes, including dyeing and printing. As the textile industry in India continues to expand and modernize, the demand for cooling solutions, and consequently, DEG, is expected to witness substantial growth. Diethylene Glycol also serves as a critical ingredient in the production of high-quality inks and dyes used in the textile printing and dyeing processes. The quality and performance of inks and dyes are essential for achieving vibrant and long-lasting colors on textiles. The growing emphasis on creating innovative and appealing textile products has led to an increased demand for DEG as an essential component in ink and dye formulations.

Also, DEG is employed in the production of various textile auxiliaries, including dye carriers and wetting agents. These auxiliaries enhance the quality and functionality of textiles, providing attributes like softness, wrinkle resistance, and color fastness. As the textile industry focuses on meeting consumer demands for high-quality and aesthetically pleasing textile products, the need for textile auxiliaries containing DEG is expected to grow. As the textile industry in India continues to thrive, the Diethylene Glycol market is well-positioned for growth. Its diverse applications in the production of polyester fibers, cooling solutions, inks, dyes, and textile auxiliaries highlight its significance and wide-ranging uses in the textile sector. The increasing demand for durable, high-

performance, and visually appealing textiles, coupled with the growth of India's textile manufacturing and fashion industry, is expected to drive the demand for Diethylene Glycol. This growth not only benefits the chemical industry but also contributes to India's economic development by supporting a sector that is pivotal for the nation's progress, employment generation, and global competitiveness in the textile market.

Key Market Challenges

Volatile Raw Material Prices

The volatility in raw material prices has been a significant hindrance to the growth of the Diethylene Glycol (DEG) market in India. DEG is a crucial chemical used in various applications, such as the production of resins, solvents, and antifreeze. It depends on several raw materials, most notably ethylene glycol and ethylene oxide, the prices of which can fluctuate dramatically due to global market dynamics. The unstable costs of these raw materials can disrupt the production economics of DEG, making it challenging for manufacturers to predict and control their operational expenses. As a result, market players often find themselves grappling with cost uncertainties and variable profit margins. These fluctuations in raw material prices can hinder the growth potential of the DEG market by affecting the competitiveness of domestically produced DEG against imported alternatives, which may have more stable pricing.

To promote the growth of the DEG market in India, it is imperative for manufacturers to employ effective risk management strategies, including diversifying their supply sources, exploring cost-effective technologies, and closely monitoring global market trends to navigate the challenges posed by volatile raw material prices. Additionally, government support and policies that provide stability to the supply chain can further contribute to the industry's growth.

Stringent Environmental Regulation

Stringent environmental regulations have emerged as a significant impediment to the growth of the Diethylene Glycol (DEG) market in India. DEG is a versatile chemical compound widely used in various industries, including textiles, pharmaceuticals, and automotive, but its production can generate environmental concerns. To address these issues, Indian authorities have implemented rigorous environmental standards and regulations, which place a considerable compliance burden on DEG manufacturers. Meeting these stringent environmental requirements demands substantial investments in pollution control equipment, waste management systems, and emissions reduction

measures, leading to higher operational costs. Additionally, the need for extensive monitoring and reporting adds administrative complexities, affecting both the cost structure and operational efficiency of DEG production facilities. This not only hampers the competitiveness of domestically produced DEG but also discourages new investments in the industry.

To foster the growth of the DEG market in India, a collaborative approach between the government, regulatory bodies, and industry stakeholders is essential. This includes streamlining and simplifying environmental regulations, providing incentives for cleaner and sustainable production practices, and fostering innovation in eco-friendly technologies. Such measures can help strike a balance between environmental protection and economic growth within the DEG sector.

Key Market Trends

Finding New Applications in Industries Such as Pharmaceuticals, Cosmetics & Food and Beverages

The India Diethylene Glycol (DEG) market is currently witnessing a notable growth trend driven by the discovery of new applications in industries such as pharmaceuticals, cosmetics, and food and beverages. This diversification of DEG usage represents a significant shift in the market dynamics and opens exciting opportunities for its expansion, aligning with the changing demands of various sectors. In the pharmaceutical industry, DEG has gained prominence as an essential ingredient in the formulation of various medications and drugs. Its properties make it an ideal solvent, coupling agent, and stabilizer in pharmaceutical products. The versatility of DEG has led to its increased adoption for drug formulations, underscoring its importance in enhancing the effectiveness and stability of pharmaceuticals.

Cosmetics is another industry where DEG has found new applications, primarily in the production of skincare and personal care products. Its hygroscopic properties and ability to improve the texture and consistency of cosmetics make it a valuable component in a range of products, from moisturizers to makeup. The food and beverages industry has embraced DEG for various purposes, including as a food-grade solvent and humectant. It enhances the texture and shelf life of products, serving as an important ingredient in food manufacturing, particularly in the production of certain types of flavorings and extracts. The diversification of DEG applications across these industries reflects the substance's adaptability and its role as an enabling agent for product improvement. This trend not only bolsters the growth of the India DEG market but also underlines the

pivotal role it plays in supporting advancements in pharmaceuticals, cosmetics, and the food and beverages sector. As these industries continue to expand and innovate, DEG's significance is poised to increase, driving further growth and demand within the Indian market.

Focusing on Developing Sustainable DEG Products

One of the pivotal trends fueling the growth of the India Diethylene Glycol (DEG) market is the industry's focused commitment to developing sustainable DEG products. This trend underscores the growing awareness of environmental sustainability and the imperative to reduce the ecological footprint of chemical production processes. India is actively embracing this paradigm shift by concentrating on the development of more eco-friendly and sustainable DEG variants.

In this endeavor, research and development activities are instrumental, striving to optimize DEG production methods while prioritizing eco-friendliness. These efforts aim to reduce the environmental impact of DEG production and enhance its sustainability by exploring alternative feedstocks, improving energy efficiency, and adopting greener technologies.

This sustainable approach resonates with both domestic and international consumers and industries that are increasingly conscious of the environmental and social implications of their choices. As a result, India's DEG market is in a prime position to meet the rising demand for sustainable DEG products, not only within the country but also in the global marketplace. The focus on developing sustainable DEG products represents a pivotal growth trend in the India DEG market. As the world shifts towards a more environmentally responsible and sustainable future, this trend ensures that DEG remains a key player in the chemical industry, offering eco-conscious solutions to a diverse array of applications. It underscores India's commitment to harmonizing economic growth with environmental preservation and positions the country as a progressive and influential player in the global DEG market.

Segmental Insights

End User Industry Insights

Based on the end user industry, the textiles segment emerged as the dominant segment in the Indian market for Diethylene Glycol (DEG) in 2024. This dominance can be attributed to the significant role that DEG plays in various applications within the

textile industry, making it an essential component in the production of textiles and related products.

DEG is widely used in the textiles sector as a crucial ingredient in the manufacturing of polyester and other synthetic fibers. It serves as a vital component in the production of polyethylene terephthalate (PET) resin, which, in turn, is used to make polyester fibers. These fibers are widely employed in the textiles industry for a broad range of products, including clothing, upholstery, home textiles, and industrial fabrics. The Indian textiles sector has experienced substantial growth, driven by domestic demand and exports. The versatility and performance-enhancing properties of DEG in polyester fiber production have made it the preferred choice for manufacturers, ensuring the quality, durability, and versatility of textile products.

DEG's dominance in the textiles segment is further emphasized by its role in the dyeing and finishing processes. It is used as a solvent for dyes and as a carrier in the application of colorants to textiles. This ensures that the textiles retain their vibrant colors and meet the high-quality standards demanded by consumers. As India's textiles industry continues to expand, the demand for DEG is expected to persist, ensuring the continued dominance of the textiles segment in the DEG market.

Application Insights

Based on the application, the polyester resin segment is projected to experience rapid growth during the forecast period. This growth is attributed to the vital role that DEG plays in the production of polyester resins, which are widely used in various industries, including the manufacture of plastics, paints, coatings, and adhesives. DEG serves as a critical feedstock in the production of polyester resins, specifically in the formation of unsaturated polyester resins (UPR). These resins are fundamental in the manufacturing of a broad spectrum of products, such as fiberglass-reinforced plastics, composite materials, laminates, and synthetic marble. They are valued for their versatility, excellent adhesion properties, and resistance to environmental factors, making them integral in several applications. The Indian market has witnessed substantial growth in industries that rely on polyester resins. This includes the construction, automotive, and marine sectors, where UPR-based materials are used for diverse applications. DEG's role in ensuring the quality and performance of these materials has solidified its position as the dominant type in the market.

Polyester resins are also widely used in the production of paints, coatings, and adhesives, further reinforcing the importance of the polyester resin segment in the DEG

market. DEG's involvement in these applications contributes to the creation of durable and high-quality coatings and adhesives. As India's industrial and manufacturing sectors continue to expand, the demand for polyester resins and, consequently, DEG is expected to persist, ensuring the continued dominance of the polyester resin segment in the market.

Regional Insights

Based on the region, the West region has clearly asserted its dominance, marking its significance in the production and distribution of this essential chemical compound. This regional prominence can be attributed to several factors, including well-established industrial infrastructure, proximity to key resources, and access to transportation networks. The West region of India, particularly the states of Gujarat and Maharashtra, hosts a substantial portion of the country's chemical and petrochemical manufacturing facilities. This region is renowned for its industrial clusters and parks dedicated to the chemical and petrochemical industries, which have been pivotal in the production and distribution of DEG. These facilities support the region's dominance in the DEG market. The West region benefits from its strategic location near major ports and petrochemical complexes along the western coastline. This positioning facilitates efficient access to the import of crucial raw materials, such as ethylene oxide, which is a primary feedstock for DEG production. This logistical advantage ensures a steady supply chain for DEG manufacturers in the region. The skilled workforce, supportive business environment, and well-developed transportation infrastructure in the West region further contribute to its dominance in the DEG market. As India's chemical and petrochemical sectors continue to grow and evolve, the West region's robust capabilities and strategic advantages make it a key contributor to the country's industrial development and the DEG market.

Key Market Players

Reliance Industries Limited

Indian Oil Corporation Limited (IOCL)

Tata Chemicals Limited

Acuro Organics Limited

Vizag Chemical International

Report Scope:

In this report, the India Diethylene Glycol (DEG) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Diethylene Glycol (DEG) Market, By Application:

Plasticizer

Solvent

Printing Inks

Paint Pigments

Dye Formation

Polyester Resin

Chemical Intermediate

Unsaturated Resin

Thermoplastic Polyurethanes

Polyester PolyolsPEG

TriEG

TetraEG

Emulsifiers

Morpholine

Freezing Point Depressant

Antifreeze Coolant

Heat Transfer Fluids

Lubricant

Glass Cement Grinding

Polishes

Mold Release Agents

Dehydrant

Brake Fluids

Cosmetic & Personal Care

Others

India Diethylene Glycol (DEG) Market, By End User Industry:

Plastic Industry

Paints and Coatings

Automotive

Agrochemical

Oil and Gas

Cement

Textiles

Cosmetic and Personal Care

Others

India Diethylene Glycol (DEG) Market, By Region:

West India

North India

South India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Diethylene Glycol (DEG) Market.

Available Customizations:

India Diethylene Glycol (DEG) Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Detailed analysis and profiling of additional market players (up to five).

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