

India Ethanol Market Analysis: Plant Capacity, Production, Operating Efficiency, Technology, Process, Demand & Supply, Grade, Source, Purity, End Use, Distribution Channel, Region, Competition, Trade, Customer & Price Intelligence Market Analysis, 2015-2030

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Abstracts

India Ethanol market demand stood at 3250 Million Litres in FY2021 and is forecast to reach 5412.06 Million Litres by FY2030, growing at a healthy CAGR of 8.25% until FY2030.

The Indian Ethanol (also called Ethyl Alcohol) market is projected to expand aggressively in the forecast period on the back of increased Ethanol consumption in fuel additives and beverages. Moreover, heavy investments made by the Government of India towards converting excess sugar to Ethanol, further strengthened by the government's vision to create an Ethanol Economy will accelerate the Ethanol demand in the forecast period.

With the start of National Biofuel Policy 2018, which has put forth an Ethanol blending target of 10% by 2022 and 20% by 2030 from the current rate of 2-3%, Ethanol demand is set to grow by leaps and bounds in the period of forecast. Over the past five years, the Indian government has been encouraging Ethanol capacity expansion to cut its dependency on imported crude oil and channelize the excess sugar inventories into Ethanol production. These factors will further propel the growth of the Ethanol market in India.

Ethanol is also a prominent alcoholic beverage, mainly found in beer, cider, wine, and

spirits. Hence factors such as changing lifestyle along with growing adoption of the western culture are likely to drive the demand for Ethanol in the country. The increasing production of wine and other alcoholic beverages would further contribute to the growth of the Ethyl alcohol market during the forecast period.

Because of its broad-spectrum germicidal properties, Ethanol also finds several applications in disinfectants and has been strongly recommended by WHO as an important constituent in alcohol-based hand sanitizers. Increasing demand for disinfectants with rising health consciousness among people will further escalate the Ethanol demand in the coming years.

However, the COVID-19 outbreak rendered an unprecedented slump in the fuel demand as transportation and logistics remained hit due to lockdown measures taken to contain the virus spread. Despite the crash in fuel demand, Ethanol players remained opportunistic as demand from the hand sanitizer segment broke records since the pandemic hit the country. Ethanol is an essential ingredient in the production of alcohol-based hand sanitizers and has been recommended by WHO in potentially deactivating the virus. Hence, there was a sudden boost in domestic Ethanol demand in Q4 FY20, causing several sugar mills such as the Indian Sugar Mills Association (ISMA) and All India Distiller Association (AIDA) to increase their produced Ethanol volumes.

India currently aims to achieve an E10 blend by 2020 and E20 by 2030. The country's Ethanol Blending Program highlights procurement of Ethanol produced directly from B-heavy molasses, sugarcane juice, and damaged food grains. A surplus sugar season coupled with financial incentives to convert excess sugar into ethanol is expected to boost the Ethanol produced volumes over the years ahead.

Moreover, India's resolve to reduce pollution and dedication towards fulfilling its COP-21, the UN Climate Conference commitments, would drive the Ethanol industry in the long term. Also, the Cabinet Committee on Economic Affairs (CCEA) in FY19 approved 'Pradhan Mantri JI-VAN Yojana' for providing financial support to integrated bio-ethanol projects using lignocellulosic biomass and several renewable feedstocks. These factors would highly favor the growth of the Indian Ethanol industry in the future.

Years Considered for this Report:

Historical Years: FY2015 – FY2020

Base Year: FY2021

Estimated Year: FY2022

Forecast Period: FY2023– FY2030

This report will be delivered on an online digital platform with a one-year subscription and quarterly update.

Objective of the Study:

The primary objective of the study was to evaluate and forecast Ethanol capacity, production, demand, inventory, and the demand-supply gap in India.

To categorize Ethanol demand based on application, end use, grade, source, purity, region, and sales channel.

To study trade dynamics and company share in the India Ethanol market.

To identify major customers of Ethanol in India.

To evaluate and forecast Ethanol pricing by grade in the India Ethanol market.

To identify and profile major companies operating in the India Ethanol market.

To identify major news, deals, and expansion plans in the India Ethanol market.

Some of the major players operating in the Indian Ethanol market are India Glycols, Bajaj Hindusthan Sugar, Shree Renuka Sugars Ltd., Triveni Engineering & Industries Ltd., Balrampur Chini Mills Ltd., Mawana Sugars Ltd., HPCL Biofuels Limited, Jeypore Sugar Company Ltd., Simbhaoli Sugars Ltd., BSM Sugar and E.I.D Parry India Ltd. Hefty investments in the expansion of Indian Ethanol Industry can potentially make India one of the largest Ethanol producers in the world. Indian Oil and SunLight Fuel are

planning to foray into Ethanol production with over INR 2,500 crore greenfield investment. Several other private sugar mills and cooperatives are planning to follow the suit to address the issue of excess sugar production. INR 100 crore investment plan of the UP government to upgrade cooperative sugar mills to produce Ethanol along with sugar, is yet another venture into the country's Ethanol market.

Despite the steady increase in Ethanol production, India is still a net importer of Ethanol. In FY20, the US remained the single-largest Ethanol supplier to India. In Q3 FY20, the government announced to increase the prices of different grades of Ethanol under the Ethanol Blended Petrol (EBP) Programme for the forthcoming Ethanol procurement season 2019-20.

To extract data for the India Ethanol market, primary research surveys were conducted with Ethanol manufacturers, suppliers, distributors, wholesalers, and end-users. While interviewing, the respondents were also inquired about their competitors. Through this technique, ChemAnalyst was able to include manufacturers that could not be identified due to the limitations of secondary research. Moreover, ChemAnalyst analyzed various end-user segments and projected a positive outlook for the India Ethanol market over the coming years.

ChemAnalyst calculated Ethanol demand in India by analyzing the historical data and demand forecast was carried out considering the end-use industries growth. ChemAnalyst sourced these values from industry experts and company representatives and externally validated them through analyzing historical sales data of respective manufacturers to arrive at the overall market size. Various secondary sources such as company websites, association reports, annual reports, etc., were also studied by ChemAnalyst.

Key Target Audience:

Ethanol manufacturers and other stakeholders

Organizations, forums, and alliances related to Ethanol distribution

Government bodies such as regulating authorities and policymakers

Market research organizations and consulting companies

The study is useful in providing answers to several critical questions that are important for industry stakeholders, such as Ethanol manufacturers, distributors, and policymakers. The report also provides useful insights about which market segments should be targeted over the coming years to strategize investments and capitalize on growth opportunities.

Report Scope:

In this report, the India Ethanol market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Market, by Grade- Food Grade, Industrial Grade, Pharmaceutical Grade, and Lab Grade

Market, by Source- Sugar & Molasses Based Ethanol, Second Generation & Grain Based Ethanol

Market, by Purity- Denatured & Undenatured

Market, by End Use- Industrial Solvent, Fuel & Fuel Additive, Beverages & Others

Market, by Sales Channel- Direct/Institutional Sales, Retail Sales, Other Channel Sales

Market, by Region- North, West, East, and South

Available Customizations:

With the given market data, ChemAnalyst offers customizations according to a company's specific needs.

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