

India Ethylene Market Analysis: Plant Capacity, Production, Operating Efficiency, Demand & Supply, End-User Industries, Sales Channel, Regional Demand, Company Share, Foreign Trade, FY2015-FY2030

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Abstracts

The India Ethylene market stood at approximately 7200 thousand tonnes in FY2023 and is anticipated to grow at a healthy CAGR of 9.29% by FY2030. Increasing demand for Ethylene for manufacturing Polyethylene, which is a popular material to make plastic films for packaging applications is expected to spur the demand for ethylene across India.

Ethylene is a versatile chemical that is used to manufacture useful chemicals like Polyethylene, Ethylene Oxide, Ethylene Dichloride, Ethylene Benzene, and Others. Ethylene Oxide (EO) is the second largest consumer of India's Ethylene market. EO finds key applications in manufacturing Ethylene Glycol, the most common of which is monoethylene glycol (MEG) which further making PET resins. EO derivatives like ethoxylates (used in shampoo, kitchen cleaners, etc), glycol ethers (solvents, fuels, etc), and ethanolamines (surfactants, personal care products, etc) are contributing to the ethylene demand across India. Moreover, rising demand for Ethylene derivatives such as Polyvinyl Chloride (PVC), Polystyrene and Polyester Resins will most likely give a strong boost to the growth of the Ethylene Industry in India. Ethylene Dichloride is employed as a feedstock to produce Polyvinyl Chloride (PVC), which is a versatile polymer with various applications such as Pipes & Fittings, Films & Sheets, Wires & Cables, Footwear, ETC.

Increasing demand for polyethylene such as HDPE, LDPE, and LLDPE from the packaging sector driven by increasing organized retail and the boom in the e-commerce

industry is anticipated to be the primary reason for the growth of the India Ethylene market in the forecast period. Several varieties of polyethylene exist, including LDPE (Low-Density Polyethylene) and HDPE (High-Density Polyethylene). Shrink and stretch film for food packaging, as well as non-packaging usage, are the principal film applications for low density polyethylene (LDPE) and linear low-density polyethylene (LLDPE). Injection and blow molding processes are the main ways that high density polyethylene (HDPE) is employed in products like pallets, barrels, drums, household items, etc. Moreover, increasing use of plastic packaging in food, beverages, personal care, healthcare and consumer electronics industries will most likely further augment the growth of Ethylene market in the forecast period. Rapid urbanization and infrastructure developments across the nation are portraying a major chunk of the demand for building and construction plastics, which is a prominent factor of the India Ethylene market and is anticipated to say so in the future.

Based on region, the India Ethylene Market is segregated into North, South, East, and West. In the historic period of FY2015-FY2023, West India has been dominating the market. West India has been the frontrunner in the consumption of Ethylene for a variety of uses due to the presence of significant consumer goods producers as well as major plasticizer factories situated in states like Gujarat. The plastic commodities manufactured include plastic furniture, boxes, containers, etc.

Based on end-use, the India Ethylene market is segregated into different industrial sectors such as Polyethylene, Ethylene Oxide, Ethylene Dichloride, Ethylene Benzene, and Others. Among these, Polyethylene is dominating the segment of Ethylene. This segment held roughly 45% of the Ethylene market in FY2023. Owing to changing customer preferences towards ready-to-eat food items, this sector is anticipated to retain its dominance for packaging applications in the forecast period.

Some of the domestic players operating in India Ethylene market are Reliance Industries Limited, Indian Oil Corporation Limited, GAIL (India) Limited, ONGC Petro Additions Limited and Haldia Petrochemicals Limited. LyondellBasell, Dow Chemical Co., ExxonMobil, Chevron Phillips, Shell, and INEOS are some of the international players operating in India Ethylene market.

Years considered for this report:

Historical Period: FY2015-FY2023

Base Year: FY2023

Estimated Year: FY2024

Forecast Period: FY2025- FY2030

Objective of the Study:

To assess the demand-supply scenario of Ethylene which covers production, demand and supply of Ethylene market in India.

To analyse and forecast the market size of Ethylene in India.

To classify and forecast India Ethylene market based on end-use and regional distribution.

To examine competitive developments such as expansions, green field projects/ brown field expansions, mergers & acquisitions, etc., of Ethylene market in India.

To extract data for India Ethylene market, primary research surveys were conducted with Ethylene manufacturers, suppliers, distributors, wholesalers and Traders. 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 segments and projected a positive outlook for India Ethylene market over the coming years.

ChemAnalyst calculated Ethylene demand in India by analyzing the historical data and demand forecast which was carried out considering the imports and domestic production coupled with demand from end user industry. ChemAnalyst sourced these values from industry experts and company representatives and externally validated through analyzing historical sales data / import data of Ethylene 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:

Ethylene manufacturers and other stakeholders

Organizations, forums and alliances related to Ethylene distribution

Government bodies such as regulating authorities and policy makers

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 Ethylene manufacturers, customers and policy makers. The study would also help them to target the growing segments over the coming years, thereby aiding the stakeholders in taking investment decisions and facilitating their expansion.

Report Scope:

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

Market, by End-use: Polyethylene, Ethylene Oxide, Ethylene Dichloride, Ethylene Benzene, and Others

Market, by Sales Channel: Direct Sale and Indirect Sale

Market, by Region: North India, South India, East India, West India

Available Customizations:

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

Contents

1. CAPACITY BY COMPANY

On our online platform, you can stay up to date with essential manufacturers and their current and future operation capacity on a practically real-time basis for Ethylene.

2. CAPACITY BY LOCATION

To better understand the regional supply of Ethylene by analyzing its manufacturers' location-based capacity.

3. PLANT OPERATING EFFICIENCY

To determine what percentage manufacturers are operating their plants or how much capacity is being currently used.

4. PRODUCTION BY COMPANY

Study the historical annual production of Ethylene by the leading players and forecast how it will grow in the coming years.

5. DEMAND BY END- USE

Discover which end-user industry (Polyethylene, Ethylene Oxide, Ethylene Dichloride, Ethylene Benzene, and Others) are creating a market and the forecast for the growth of the Ethylene market.

6. DEMAND BY REGION

Analyzing the change in demand of Ethylene in different regions across India, i.e., North India, South India, East India, West India, that can direct you in mapping the regional demand.

7. DEMAND BY SALES CHANNEL (DIRECT AND INDIRECT)

Multiple channels are used to sell Ethylene. Our sales channel will help in analyzing whether distributors and dealers or direct sales make up most of the industry's sales.

8. DEMAND-SUPPLY GAP

Determine the supply-demand gap to gain information about the trade surplus or deficiency of Ethylene.

9. COMPANY SHARE

Figure out what proportion of the market share of Ethylene is currently held by leading players across India.

10. COUNTRY-WISE EXPORT

Get details about quantity of Ethylene exported by major countries.

11. COUNTRY-WISE IMPORT

Get details about quantity of Ethylene imported by major countries.

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