

India Liquefied Petroleum Gas (LPG) Market Analysis: Plant Capacity, Production, Operating Efficiency, Demand & Supply, End-User Industries, Sales Channel, Regional Demand, Company Share, Foreign Trade, FY2015-FY2030

<https://marketpublishers.com/r/I9EB9A3D0E7FEN.html>

Date: October 2023

Pages: 0

Price: US\$ 3,000.00 (Single User License)

ID: I9EB9A3D0E7FEN

Abstracts

The India Liquefied Petroleum Gas (LPG) market reached approximately 32.20 MMTPA in FY2022 and is expected to grow at a steady CAGR of around 4% by FY2030.

Liquefied petroleum gas, commonly known as LPG, is a combustible gas that runs companies and homes all over the world. A variety of hydrocarbons, such as butane or propane, make up its composition. LPG is synthesized in oil refineries and also at LPG Extract/ Gas Fractionators. At the refineries, LPG contains C3 and C4 (Propane & Butanes) components from the distillation unit along with Propylene and Butylene from secondary conversion units. Whereas, in the gas fractionators, LPG consists of C3 & C4 saturated components (Propane & Butanes). LPG is stored and transported in pressurized containers, often steel tanks, as a liquid. In addition to being used as a domestic fuel for cooking and heating, LPG has a number of industrial and commercial applications. Since LPG gas is clean, safe, and effective, most industries use it. It has a high calorific value and offers specific temperature control. Other applications of LPG include galvanizing, metal melting, heat treatment, steam generation, etc.

The growing demand for clean cooking fuels in rural, as well as urban households, is expected to give a boost to the country's LPG market in the forecast period. Support of the government in form of initiatives and subsidies to boost the sales of LPG is contributing to the market growth. Demand from the household sector increased in recent years. While the Pradhan Mantri Ujjwala Yojana (PMUY) offers free LPG stoves to low-income families, the Direct Benefit Transfer of LPG (DBTL) provides subsidies to

the marginalized group of the nation. Furthermore, other government schemes like Ujjwala schemes to provide free LPG connections to women in below-poverty-line households across the nation are promoting the usage of LPG with a concern for women's health. India Liquefied Petroleum Gas (LPG) market volume is estimated to reach approximately 38 MMTPA by FY2030. Further, India domestic production is not self sufficient to meet the country's demand therefore India import around 40-50% of LPG to meet its domestic demand.

Based on the region, the Indian Liquefied Petroleum Gas (LPG) market is segregated into the West, South, North, and East. As of FY2022, North India has been leading the market followed by West India in FY2022, North India held approximately 30% of the market.

Based on end-use, the India Liquefied Petroleum Gas (LPG) market is segregated into Residential, Commercial, Industrial, and Others. In FY2022, the Residential industry made up approximately 87% of the domestic demand. This industry is anticipated to dominate the market even in the forthcoming years. In the upcoming years, the country's LPG market is anticipated to expand because of rising household demand for clean cooking fuels in both rural and urban areas.

Major players in the India Liquefied Petroleum Gas (LPG) market are Indian Oil Corporation Limited, Hindustan Petroleum Corporation Limited, Bharat Petroleum Corporation Limited, HPCL-Mittal Energy Limited, Chennai Petroleum Corporation Limited, Reliance Petroleum Limited, Nayara Energy Limited, Bharat Oman Refineries Limited, GAIL, Mangalore Refinery and Petrochemicals Limited, and others.

Years considered for this report:

Historical Period: FY2015-FY2022

Base Year: FY2022

Estimated Year: FY2023

Forecast Period: FY2024- FY2030

Objective of the Study:

To assess the demand-supply scenario of Liquefied Petroleum Gas (LPG) which covers production, demand and supply of Liquefied Petroleum Gas (LPG) market in India.

To analyse and forecast the market size of Liquefied Petroleum Gas (LPG) in India.

To classify and forecast India Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) market in India.

To extract data for India Liquefied Petroleum Gas (LPG) market, primary research surveys were conducted with Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) market over the coming years.

ChemAnalyst calculated Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) 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:

Liquefied Petroleum Gas (LPG) manufacturers and other stakeholders

Organizations, forums and alliances related to Liquefied

Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

Market, by End-use: Residential, Commercial, Industrial, 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 Liquefied Petroleum Gas (LPG).

2. CAPACITY BY LOCATION

To better understand the regional supply of Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG) by the leading players and forecast how it will grow in the coming years.

5. DEMAND BY END- USE

Discover which end-user industry (Residential, Commercial, Industrial, and Others) are creating a market and the forecast for the growth of the Liquefied Petroleum Gas (LPG) market.

6. DEMAND BY REGION

Analyzing the change in demand of Liquefied Petroleum Gas (LPG) 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 Liquefied Petroleum Gas (LPG). 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 Liquefied Petroleum Gas (LPG).

9. COMPANY SHARE

Figure out what proportion of the market share of Liquefied Petroleum Gas (LPG) is currently held by leading players across India.

10. COUNTRY-WISE EXPORT

Get details about quantity of Liquefied Petroleum Gas (LPG) exported by major countries.

11. COUNTRY-WISE IMPORT

Get details about quantity of Liquefied Petroleum Gas (LPG) imported by major countries.

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