

India Maleic Anhydride Market, By Raw Material (N-butane, Benzene), By Application (Unsaturated Polyester Resins (UPR), 1,4-BDO, Lubricating Oil Additives, Copolymers, Food Additives, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

India Maleic Anhydride Market achieved a total market volume of 5.68 thousand Metric Tonnes in 2024 and is poised for significant growth to reach 6.80 thousand Metric Tonnes in 2030, with a projected Compound Annual Growth Rate (CAGR) of 3.65% during forecast period.

Maleic anhydride, a versatile chemical compound with a range of industrial applications, plays a significant role in the production of resins, coatings, and various chemical intermediates. As a crucial intermediate, maleic anhydride contributes significantly to India's chemical and industrial landscape. The Indian maleic anhydride market has witnessed substantial growth due to the country's expanding industrial base, the demand for resins and coatings, and its pivotal role in the production of various chemical products. The Indian maleic anhydride market has experienced significant growth in recent years.

Maleic anhydride is a versatile chemical with applications ranging from the production of unsaturated polyester resins to the synthesis of chemical intermediates. Its importance is underscored by its role in various industries, from plastics to agriculture. The production of unsaturated polyester resins is a significant driver of the maleic anhydride market in India. Maleic anhydride serves as a crucial raw material in the synthesis of these resins used in various industrial applications, including the

manufacturing of fiberglass-reinforced plastics. The expansion of India's construction and automotive sectors has contributed to the demand for unsaturated polyester resins.

Maleic anhydride is used in the production of agrochemicals and various chemical intermediates, including malic acid and fumaric acid. The growth of the agrochemicals and specialty chemicals sectors has significantly increased the demand for maleic anhydride. Maleic anhydride finds application in the production of coatings and adhesives. As India's construction and automotive industries grow, the demand for coatings and adhesives has increased. Maleic anhydride is a corrosive and toxic chemical that requires careful handling and storage. Adherence to stringent safety protocols is crucial to mitigate these risks. The production and use of maleic anhydride can raise environmental concerns, particularly in terms of emissions and waste disposal. Regulatory compliance and responsible disposal are vital challenges. There is a growing emphasis on adopting green and sustainable practices in maleic anhydride production. The industry is exploring cleaner and more environmentally friendly production methods. Research and development efforts are directed towards the development of bio-based maleic anhydride, potentially influencing the demand for sustainable alternatives. On November 1st, 2021, the Indian Oil Board approved the construction of India's inaugural mega-scale Maleic Anhydride Plant at the Panipat Refinery and Petroleum Complex. With a CAPEX of Rs 3681 crore, the project aims to enhance value-added chemical production. Scheduled for commissioning within 54 months, the plant will produce Maleic Anhydride, 1,4-Butanediol, and Tetrahydrofuran, key components for specialty products in various industries including pharmaceuticals, plastics, and coatings. This initiative signifies a significant step towards fostering industrial development, self-sufficiency, and innovation in India's chemical manufacturing sector.

The future outlook for the Indian maleic anhydride market remains positive. As India's construction, automotive, and specialty chemicals sectors continue to grow, the demand for maleic anhydride is expected to persist. The industry is also likely to adapt to emerging trends, with a strong focus on green and sustainable practices in production and the development of bio-based alternatives. The Indian maleic anhydride market is a vital player in supporting the country's construction, automotive, and specialty chemicals sectors. As India advances on its path of industrialization and environmental awareness, the market is poised to evolve and thrive, reinforcing its significance in the chemical and manufacturing landscape of the nation.

Key Market Drivers

Increasing Use of Maleic Anhydride for Production of Unsaturated Polyester Resins Propels Indian Maleic Anhydride Market Growth

The Indian maleic anhydride market is experiencing notable growth, primarily driven by the increasing demand for the production of unsaturated polyester resins (UPRs). Maleic anhydride, a versatile chemical compound, plays a pivotal role in the synthesis of UPRs, contributing to the expansion of India's maleic anhydride market.

The key factors fueling the surge in demand for maleic anhydride in India is its essential role as a key precursor in the production of UPRs. Unsaturated polyester resins are a class of thermosetting polymers widely used in various industries, including construction, automotive, marine, and manufacturing. UPRs are renowned for their versatility, durability, and resistance to corrosion, making them vital for a wide range of applications.

Maleic anhydride serves as a critical component in the synthesis of UPRs. It undergoes a reaction with a variety of diols or polyols, such as propylene glycol and ethylene glycol, to form the backbone of UPRs. This reaction results in a polymer that can be further modified and customized to meet specific performance requirements. UPRs derived from maleic anhydride are used to manufacture composite materials, fiberglass products, coatings, and a range of molded and laminated components.

The construction industry is one of the major consumers of UPRs. These resins are used to produce composite materials for building and infrastructure applications. UPR-based composites are highly valued for their strength-to-weight ratio, which makes them ideal for reinforcing concrete structures, producing lightweight panels, and enhancing the durability of construction materials. As India witnesses continued growth in construction and infrastructure development, the demand for UPRs, and thus maleic anhydride, is on the rise.

Moreover, the automotive sector relies on UPRs for various applications, including manufacturing body panels, bumpers, and interior components. UPRs provide automotive parts with high strength and resistance to corrosion, contributing to vehicle safety and longevity. The growth of the automotive industry in India, driven by increased consumer demand, innovation, and sustainability goals, underscores the demand for UPRs derived from maleic anhydride.

The marine industry is another significant user of UPRs, particularly for producing boat hulls and components. UPR-based composites offer excellent water resistance, durability, and ease of moldability, making them the material of choice for marine applications. As India's coastal areas and water-based recreational activities continue to thrive, the demand for UPRs in the marine industry grows, along with the demand for maleic anhydride.

Manufacturing, including the production of pipes, tanks, and various industrial components, also heavily relies on UPRs. These resins contribute to the production of durable and corrosion-resistant equipment, essential in numerous industrial processes. The demand for UPRs in the manufacturing sector drives the need for maleic anhydride, as it is a fundamental precursor in UPR synthesis. The consumer goods industry employs UPRs for manufacturing a wide range of products, from household appliances to bathroom fixtures. UPR-based composites offer design flexibility and durability, contributing to the production of high-quality consumer goods. As the Indian economy continues to expand and consumer preferences evolve, the demand for UPRs in this sector is expected to increase.

The growth of India's composite industry, which is closely linked to UPR production, is another significant factor driving the demand for maleic anhydride. Composites are widely used in various sectors, including aerospace, wind energy, and sports equipment manufacturing. As India aims to promote sustainability and advanced manufacturing, composites derived from maleic anhydride are likely to play a central role in these industries.

Thus, the increasing use of maleic anhydride for the production of UPRs, driven by the versatile applications of UPRs in construction, automotive, marine, manufacturing, and consumer goods industries, is a significant driving force behind the growth of the maleic anhydride market in India. Maleic anhydride's crucial role in UPR synthesis positions it as a fundamental component in various industries, supporting innovation, sustainability, and economic growth. As India continues to advance and diversify its industrial landscape, the demand for maleic anhydride is expected to remain strong, contributing to the country's position as a key player in the global market and the facilitation of innovative and high-quality products across various sectors.

Rising Demand of Maleic Anhydride-based Paint and Coating from Construction and Automotive Industries Propels India's Maleic Anhydride Market Growth

The Indian maleic anhydride market is experiencing robust growth, primarily driven by the

increasing demand for maleic anhydride-based paint and coatings, particularly from the construction and automotive industries. Maleic anhydride, a versatile chemical compound, serves as a crucial ingredient in the synthesis of various paints, coatings, and resins, contributing to the expansion of India's maleic anhydride market. One of the key factors behind the surge in demand for maleic anhydride in India is its essential role in the production of alkyd resins. Alkyd resins are widely used in the formulation of paints and coatings due to their excellent adhesion, durability, and versatility. These resins can be modified to suit specific applications, and they provide a smooth and glossy finish when used in various coating formulations.

The construction industry is a significant driver of the demand for maleic anhydride-based paints and coatings. These materials are used in architectural coatings, such as exterior and interior paints, varnishes, and sealants, as well as in protective coatings for infrastructure and building components. Maleic anhydride contributes to the performance and longevity of these coatings by enhancing their adhesion, weather resistance, and durability. As India experiences rapid urbanization and infrastructure development, the demand for high-quality paints and coatings in construction applications is on the rise.

The automotive industry heavily relies on maleic anhydride-based coatings for vehicles. These coatings are applied to various automotive components, including the vehicle's body, engine parts, and interior surfaces. Maleic anhydride-based coatings provide a protective layer that enhances the appearance of the vehicle and offers corrosion resistance, ensuring the longevity of automotive components. As the automotive sector in India continues to grow, driven by increasing consumer demand, technological advancements, and sustainability goals, the demand for maleic anhydride-based coatings is expected to increase. India aims to double the size of its automotive industry to INR 15 lakh crore by the end of 2024. Within the Indian automobile market, two-wheelers and passenger cars hold significant shares, accounting for 76% and 17.4% respectively. Notably, the passenger car segment is dominated by small and mid-sized cars. Export figures reveal that in the fiscal year 2022-23, a total of 47,61,487 automobiles were exported, with two-wheelers comprising approximately 77% of the total exports. Furthermore, during the period from April 2022 to March 2023, passenger vehicle exports surged from 5,77,875 to 6,62,891 units, marking a robust growth rate of 14.7%. In the Union Budget 2023, the government has allocated a substantial increase of 78% to the budget of FAME II. This significant budgetary boost is poised to have a notable impact on the automotive industry, particularly in incentivizing the adoption of electric vehicles and promoting sustainable mobility solutions.

In addition to the construction and automotive industries, maleic anhydride-based coatings find applications in industrial and protective coatings. These coatings are used for a wide range of applications, from machinery and equipment storage tanks and pipelines. The protective properties of maleic anhydride-based coatings make them indispensable in safeguarding industrial assets and infrastructure from environmental factors and corrosion. As various industrial sectors in India expand and upgrade their facilities, the demand for high-performance coatings remains strong.

Maleic anhydride contributes to the production of adhesive and sealant formulations used in the manufacturing and construction sectors. These adhesives and sealants play a crucial role in bonding materials, preventing leaks, and providing structural integrity. Maleic anhydride-based adhesive and sealant formulations are valued for their ability to adhere to various substrates and provide durable and long-lasting bonds. The growth of India's paint and coatings industry, driven by increased infrastructure development, renovation projects, and the automotive sector's expansion, is a significant factor contributing to the demand for maleic anhydride. The Indian government's focus on the construction and automotive sectors as key drivers of economic growth further supports this demand, emphasizing the need for high-quality and innovative coatings in these industries.

The rising demand for maleic anhydride-based paints and coatings, primarily from the construction and automotive sectors, is a significant driving force behind the growth of the maleic anhydride market in India. Maleic anhydride's pivotal role in the formulation of coatings and adhesives positions it as a fundamental component in various industries, promoting innovation, sustainability, and economic growth. As India continues to advance and diversify its industrial landscape, the demand for maleic anhydride is expected to remain strong, contributing to the country's position as a key player in the global market and the facilitation of high-quality and durable coatings across multiple sectors.

Growing Demand as Agrochemicals and Chemical Intermediates is Propelling the India Maleic Anhydride Market Growth

The Indian maleic anhydride market is experiencing significant growth, primarily driven by the increasing demand for maleic anhydride in the production of agrochemicals and chemical intermediates. Maleic anhydride, a versatile chemical compound, plays a pivotal role in the synthesis of various agrochemicals and serves as a key intermediate in the production of other chemical compounds, contributing to the expansion of

India's maleic anhydride market.

One of the key factors contributing to the surge in demand for maleic anhydride in India is its crucial role in the manufacturing of pesticides and herbicides. These agrochemicals are essential for crop protection, as they help farmers combat pests, diseases, and weeds, ultimately ensuring higher agricultural yields and food security. Maleic anhydride serves as a building block in the synthesis of active ingredients in these agrochemicals, contributing to their effectiveness and performance. As India grapples with the challenge of feeding its large and growing population, the need for agrochemicals and, by extension, maleic anhydride, continues to rise.

Maleic anhydride is employed as a chemical intermediate in the production of various compounds used in the chemical industry. These chemical intermediates serve as precursors in the synthesis of a wide range of chemical products, including resins, plastics, and specialty chemicals. The versatility and flexibility of maleic anhydride in chemical synthesis make it a vital component for various industrial applications. Maleic anhydride is used in the production of maleic acid, which is a key ingredient in the synthesis of specialty chemicals such as fumaric acid. These chemicals find applications in diverse industries, including food and beverages, pharmaceuticals, and agriculture. They are used as acidulants, flavor enhancers, and pH control agents, contributing to the quality and stability of various products. Maleic anhydride serves as a precursor for the production of resins, including alkyd resins and unsaturated polyester resins. These resins have broad applications in coatings, adhesives, and composite materials, and they play a pivotal role in multiple industries, including construction, automotive, and manufacturing. The demand for these resins, and therefore maleic anhydride, is driven by the need for durable and high-performance materials in these sectors.

In the pharmaceutical industry, maleic anhydride is used to produce maleic acid esters. These esters are essential components in the synthesis of various pharmaceutical compounds, including active pharmaceutical ingredients (APIs). Maleic anhydride-derived compounds contribute to the development of pharmaceutical products that address a multitude of healthcare issues, including pain management, cardiovascular health, and infectious diseases. As the pharmaceutical industry in India continues to grow and innovate to meet domestic and international healthcare demands, the demand for maleic anhydride remains strong.

Maleic anhydride plays a role in the production of maleic anhydride grafted polyolefins (MA-g-PO). These materials are used as compatibilizers and modifiers in the plastics

and polymer industry, enhancing the compatibility and performance of different polymer blends. As India's plastics and polymer industry expands, driven by various sectors such as packaging, automotive, and consumer goods, the demand for maleic anhydride for these applications is expected to increase.

The growth of India's agrochemical and chemical industries, which rely on maleic anhydride to produce key compounds and intermediates, is a significant driver behind the increasing demand for this versatile chemical. As India continues to invest in agricultural and chemical sectors and aims to strengthen its position in the global market, the demand for maleic anhydride remains strong, supporting innovation, sustainability, and economic growth. The growing demand for maleic anhydride in India, driven by its essential role in the production of agrochemicals and chemical intermediates, positions it as a fundamental component in various industries. Maleic anhydride's versatility in chemical synthesis aligns with India's industrial advancement and contributes to the country's position as a key player in the global market, facilitating the production of high-quality agrochemicals, chemicals, and intermediates across various sectors.

Key Market Challenges

Increasing Competition from Foreign Players

Increasing competition from foreign companies is a significant obstacle hindering the growth of the India Maleic Anhydride market. Maleic anhydride is a crucial chemical used in various industries, including chemicals, plastics, and resins. While the demand for maleic anhydride is steadily rising in India, the market faces challenges from international manufacturers who can offer competitive pricing, often due to lower production costs and well-established supply chains. This growing competition can disrupt the market dynamics, pricing structures, and the ability of domestic players to maintain a competitive edge. Indian maleic anhydride manufacturers must contend with the challenge of cost-efficiency while maintaining quality standards and environmental responsibility.

To address this challenge, the India Maleic Anhydride market must emphasize its strengths, such as product quality and local production advantages. Investment in cost-effective production processes, research and development, and collaboration with industry stakeholders and government agencies are essential for maintaining a competitive edge and sustaining market growth in the face of increasing foreign competition.

Fluctuating Prices of Raw Materials

Fluctuating prices of raw materials present a significant hindrance to the growth of the India Maleic Anhydride market. Maleic anhydride is a critical chemical compound used in various applications, including the production of resins, plastics, and coatings. Its production relies heavily on the availability and pricing of key raw materials, primarily butane and benzene. The prices of these raw materials are subject to market fluctuations influenced by factors such as supply and demand dynamics, geopolitical tensions, and energy costs. These volatile raw material prices can impact production costs, making it challenging for manufacturers to maintain consistent pricing for their customers and plan for long-term growth. The pricing trends and import analysis of Maleic anhydride offer valuable insights into the dynamics of the market. In 2020, India, Turkey, France, Italy, and Germany emerged as the top importers of this chemical compound. Fast forward to May 2024, pricing fluctuations across regions indicate shifts in demand and supply dynamics. North America maintains stability at USD 0.99 per kilogram, while Europe and Northeast Asia witness a modest 1% increase, reaching US\$1.04 and US\$1 per kilogram, respectively. In contrast, Southeast Asia experiences a more significant 1.7% rise, with prices climbing to US\$1.22 per kilogram. These price adjustments reflect changing market conditions and can influence import strategies and market positioning for stakeholders in the Maleic anhydride industry.

To overcome this challenge, the India Maleic Anhydride market must diversify its sourcing strategies, invest in efficient production processes, and engage in partnerships with raw material suppliers to stabilize the supply chain. These efforts are essential to ensure a steady supply of maleic anhydride, manage production costs effectively, and promote market growth while navigating the challenges of fluctuating raw material prices.

Key Market Trends

Government Support for the Chemical Industry

Government support for the chemical industry is a significant trend driving the growth of the India Maleic Anhydride market. Maleic anhydride, a crucial chemical compound used in various applications, including the production of resins, plastics, and coatings, is deeply entrenched in the chemical sector. The Indian government has recognized the importance of this industry and is actively introducing policies, incentives, and investments to foster its growth and development. Government initiatives encompass

various measures aimed at creating a conducive business environment for the chemical sector. These initiatives include ease of doing business, regulatory reforms, financial incentives for research and development, and support for exports within the industry. Such support enhances the competitiveness of Indian chemical manufacturers, encourages innovation, and ensures a thriving chemical sector. The government's backing for the chemical industry not only stimulates the production of maleic anhydride but also encourages the development of cleaner and more eco-friendly manufacturing processes. This aligns with India's broader commitment to sustainable and responsible industrial practices.

The India Maleic Anhydride market benefits from these government initiatives, ensuring the industry's growth and positioning it to meet domestic and international demands. This trend underscores the crucial role that maleic anhydride plays in various industrial applications and highlights the government's commitment to nurturing the chemical sector as a driver of economic development and innovation in India.

Growing Demand for Bio-based Maleic Anhydride

The growing demand for bio-based maleic anhydride is a key trend propelling the growth of the India Maleic Anhydride market. Maleic anhydride, a versatile chemical compound widely used in various industries, including plastics, resins, and coatings, is experiencing a transformation in its production methods. This trend is driven by the increasing emphasis on sustainability and environmental responsibility.

Bio-based maleic anhydride is produced from renewable sources, such as biomass, agricultural waste, or other organic feedstocks. This approach offers a more sustainable and environmentally friendly source of maleic anhydride, reducing the industry's reliance on fossil fuels and minimizing its carbon footprint. The demand for bio-based maleic anhydride aligns with India's commitment to green and sustainable manufacturing practices. As the nation strives to reduce its environmental impact and embrace responsible sourcing and production, the adoption of bio-based maleic anhydride provides a compelling solution for various applications, including eco-friendly plastics and environmentally conscious coatings.

This trend underscores the India Maleic Anhydride market's responsiveness to the evolving preferences of eco-conscious industries and consumers. It reflects the market's commitment to innovation and environmental responsibility, driving its growth while addressing sustainability and environmental concerns.

Segmental Insights

Raw Materials Insights

Based on the raw materials, the N-butane segment emerged as the dominant segment in the Indian market for Maleic Anhydride in 2024. The dominance of the N-butane segment can be attributed to its critical use as a feedstock for the catalytic oxidation process that produces Maleic Anhydride. N-butane serves as one of the primary raw materials required for the synthesis of Maleic Anhydride, and its reliability, consistency, and quality is crucial for the success of this chemical production process.

Maleic Anhydride is a versatile chemical compound used in various industries, including the production of resins, plastics, and agricultural chemicals. The growing demand for these products has significantly driven the demand for Maleic Anhydride, reinforcing the prominence of the N-butane segment. The segment's dominance is further underscored by the fact that the use of N-butane as a raw material for Maleic Anhydride production aligns with sustainable and eco-friendly production processes, reflecting the industry's commitment to environmental responsibility.

Regional Insights

Based on the region, the dominance of the Western region in the Indian Maleic Anhydride market is a result of its industrial diversity, well-established infrastructure, and strategic advantages. This dominance is expected to persist as the region continues to thrive in various chemical manufacturing sectors and as the demand for high-quality chemicals remains on the rise, particularly in the production of resins, plastics, and agricultural chemicals. One of the primary reasons for the Western region's dominance is its industrial strength and the presence of significant chemical manufacturing and petrochemical sectors. States like Gujarat and Maharashtra are home to a substantial number of manufacturing facilities that rely on Maleic Anhydride for various applications, including the production of resins, plastics, and agricultural chemicals. The region's well-established industrial infrastructure, research and development facilities, and a conducive environment for chemical manufacturing have played a pivotal role in its prominence.

The Western region's strategic location and access to major ports make it a hub for the import and distribution of chemicals like Maleic Anhydride, serving industries not only within the region but also across the country. The Western region's proactive approach to environmental regulations and its commitment to sustainability have

als%li%driven the demand for Maleic Anhydride, especially in industries that prioritize eco-friendly and high-quality production processes.

Key Market Players

Meru Chem Pvt. Ltd.

Central Drug House (P) Ltd.

Mitansh Chemicals International Private Limited

M.K. Industrial Corporation

PonPure Chemicals Group

ThirumalaiChemicals Ltd

IG Petrochemicals Limited

Report Scope:

In this report, the India Maleic Anhydride Market has been segmented int%li%the following categories, in addition t%li%the industry trends which have als%li%been detailed below:

India Maleic Anhydride Market, By Raw Materials:

N-butane

Benzene

· India Maleic Anhydride Market, By Application:

Unsaturated Polyester Resins (UPR)

1,4-BDO

Lubricating Oil Additives

Copolymers

Food Additives

Others

India Maleic Anhydride Market, By Region:

West India

North India

South India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India MaleicAnhydride Market.

Available Customizations:

India Maleic Anhydride 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:

Company Information

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

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

4. VOICE OF CUSTOMERS

5. IMPACT OF COVID-19 ON INDIA MALEIC ANHYDRIDE MARKET

6. INDIA MALEIC ANHYDRIDE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value & Volume
- 6.2. Market Share & Forecast
 - 6.2.1. By Raw Material (N-butane, Benzene)
 - 6.2.2. By Application (Unsaturated Polyester Resins (UPR), 1,4-BDO, Lubricating Oil

Additives, Copolymers, Food Additives, Others)

6.2.3. By Region (North, South, East, West)

6.2.4. By Company (2024)

6.3. Product Market Map

7. NORTH INDIA MALEIC ANHYDRIDE MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Raw Material

7.2.2. By Application

8. SOUTH INDIA MALEIC ANHYDRIDE MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Raw Material

8.2.2. By Application

9. EAST INDIA MALEIC ANHYDRIDE MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Raw Material

9.2.2. By Application

10. WEST INDIA MALEIC ANHYDRIDE MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Raw Material

10.2.2. By Application

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition
- 12.2. Product Development
- 12.3. Recent Developments

13. PORTERS FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. PRICING ANALYSIS

15. POLICY & REGULATORY FRAMEWORK

16. INDIA ECONOMIC PROFILE

17. COMPETITIVE LANDSCAPE

- 17.1. MERU Chem Pvt. Ltd.
 - 17.1.1. Business Overview
 - 17.1.2. Company Snapshot
 - 17.1.3. Products & Services
 - 17.1.4. Financials (As Reported)
 - 17.1.5. Recent Developments
- 17.2. Central Drug House (P) Ltd.
- 17.3. Mitansh Chemicals International Private Limited
- 17.4. M. K. Industrial Corporation
- 17.5. Pon Pure Chemicals Group
- 17.6. Thirumalai Chemicals Ltd
- 17.7. I G Petrochemicals Limited

18. STRATEGIC RECOMMENDATIONS

19. ABOUT US AND DISCLAIMER

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