

India Polyester Filament Yarn Market By Type (Partially Oriented Yarn, Polyester Fully Drawn Yarn, Polyester Drawn Textured Yarn), By Application (Apparel, Industrial, Household Textiles, Other), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

India Polyester Filament Yarn Market achieved a total market volume of 2,533.38 thousand Metric Tonnes in 2024 and is poised for strong growth in the forecast period to reach 3063.07 thousand Metric Tonnes, with a projected Compound Annual Growth Rate (CAGR) of 3.24% through 2030.

The Indian Polyester Filament Yarn (PFY) market is a vital component of the country's textile and industrial fabric industry, serving as a cornerstone to produce a wide range of products, including textiles, apparel, and technical fabrics. Polyester filament yarn is a versatile material with applications spanning multiple industries. PFY is an essential component in the production of textiles and apparel. It is widely used to create fabrics for clothing, including sarees, dresses, and activewear. As India's textile and apparel industry continues to grow, the demand for PFY remains robust.

PFY finds applications in technical textiles, including automotive fabrics, industrial belting, and geotextiles. As India's automotive and infrastructure sectors expand, the demand for PFY-based technical textiles has witnessed significant growth. PFY is employed in the manufacturing of home furnishing products such as curtains, upholstery, and bed linens. As consumers focus on interior aesthetics and home decor, the market for PFY in the home furnishings sector has experienced notable expansion. The supply of PFY in India is sustained through a combination of domestic production

and imports. Leading Indian textile manufacturers and synthetic yarn producers operate PFY manufacturing units, ensuring a stable supply to meet domestic needs.

Domestic production caters to a substantial portion of the market, with India occasionally importing PFY to address specific demand surges or bridge supply gaps. Import sources often include countries with robust textile industries, such as China, Taiwan, and South Korea. The production, distribution, and use of PFY in India are subject to regulatory standards set by government agencies, including the Bureau of Indian Standards (BIS) and the Ministry of Textiles. These regulations aim to ensure product quality, safety, and compliance with environmental standards, particularly with regard to textile dyes and chemicals.

The competitive landscape of the Indian PFY market showcases a blend of domestic and international players. Indian manufacturers benefit from their deep understanding of local market dynamics, consumer preferences, and established relationships with domestic clients. These companies are integral in meeting the growing demand for PFY in the textile and apparel industry. International companies from countries with robust textile sectors, such as China, Taiwan, and South Korea, also play a significant role in the Indian market. They either export PFY directly or collaborate with local distributors. This competition fosters innovation, quality enhancement, and competitive pricing, ultimately benefiting end-users.

The cost of raw materials, including polyester chips and intermediates, significantly impacts PFY production costs. Fluctuations in the prices of these raw materials can affect the profitability of PFY manufacturers. The textile industry, including PFY production, can have implications for environmental sustainability. Complying with stringent environmental regulations and adopting eco-friendly practices is crucial to address these concerns. The industry is witnessing a growing emphasis on sustainable and eco-friendly PFY production processes. This includes the adoption of green technologies, recycling of polyester materials, and reducing the environmental footprint of production. Researchers are continually exploring new and innovative applications for PFY, extending its usage beyond traditional textile sectors. This includes the development of high-performance PFY variants with improved properties for technical textiles and industrial applications.

Therefore, the India PFY market is a crucial component of the nation's textile and industrial fabric industry, contributing to the production of textiles, apparel, technical textiles, and home furnishings. While challenges related to raw material costs and environmental concerns persist, emerging trends in sustainable production and

innovative applications offer opportunities for growth and environmental responsibility. As India's textile, apparel, and industrial sectors continue to evolve, the role of PFY remains integral in shaping the nation's textile and fabric landscape.

Key Market Drivers

Rising Disposable Income and Urbanization Propels Indian Polyester Filament Yarn Market Growth

The Indian Polyester Filament Yarn (PFY) market is currently experiencing substantial growth, primarily driven by the rising disposable income and rapid urbanization in the country. Polyester Filament Yarn, a versatile and durable synthetic fiber, has found widespread use in various industries, including textiles, apparel, home furnishings, and industrial applications. The changing consumer landscape in India, characterized by increased income levels and urbanization, has led to a surge in the demand for high-quality and fashionable textiles, thus propelling the growth of the PFY market.

One of the key drivers of this growth is the rise in disposable income among Indian consumers. As the country's economy continues to expand, a growing number of households are enjoying increased purchasing power. The Gross National Disposable Income (GNDI) at current prices is projected at ₹273.99 lakh crore for the fiscal year 2022-23, reflecting a 14.5% growth compared to the previous year. In 2021-22, GNDI was estimated at ₹239.25 lakh crore, representing a growth rate of 18.8% from the prior year. This has resulted in heightened consumer demand for stylish and comfortable clothing, home textiles, and furnishings. PFY has become a preferred choice for manufacturers due to its affordability, versatility, and ability to cater to the evolving fashion preferences of the Indian population. The increased disposable income has led to a greater willingness to invest in quality textiles, contributing to the growth of the PFY market.

Urbanization is another significant factor behind the expansion of the PFY market. India is experiencing rapid urbanization, with more people moving to cities and urban areas in search of better opportunities and improved living standards. Urbanization often leads to lifestyle changes, including a shift in clothing preferences and a greater emphasis on home aesthetics. India is undergoing rapid urbanization, with its towns and cities projected to house 600 million people, or 40% of the population, by 2036—an increase from 31% in 2011. Urban areas are expected to contribute nearly 70% of the country's GDP. Effectively managing this urban transformation will be pivotal for India to achieve its goal of becoming a developed nation by 2047, marking the centenary of its

independence. The demand for urban and contemporary fashion, as well as modern and stylish home textiles, has created a thriving market for PFY. Consumers in urban areas are more likely to seek innovative and fashionable textiles, which often incorporate PFY due to its versatility and adaptability to modern design trends.

The textile and apparel industry is at the forefront of this growth, as manufacturers strive to meet the changing demands of urban consumers. PFY is an essential raw material in the production of a wide range of fabrics, from casual wear to activewear and formal attire. Its ability to blend seamlessly with other fibers and provide durability and comfort makes it a preferred choice for both clothing manufacturers and consumers. As India's urban population continues to grow, the demand for stylish, comfortable, and affordable clothing and textiles will remain a driving force in the PFY market.

The home furnishing and interior design sectors are also benefiting from increased urbanization. Urban dwellers often have different preferences for home aesthetics, seeking modern and functional designs. PFY is used in the production of upholstery, curtains, carpets, and bedding, providing these consumers with a range of attractive, durable, and easy-to-maintain options for their living spaces. The industrial applications of PFY are growing in response to urbanization. As urban areas expand, there is a greater need for safety measures, including the production of airbags, safety belts, and technical textiles used in various industries. PFY's high-strength properties make it a reliable choice for these applications, ensuring safety and performance in urban environments.

The growth of the PFY market in India has led to investments in expanding production capacities and improving product quality. A reliable supply of high-quality PFY is essential for manufacturers in various industries, as they aim to meet the expectations of urban consumers and industry standards for durability and performance. The rising disposable income and rapid urbanization in India are propelling the growth of the Polyester Filament Yarn market. The demand for stylish and comfortable clothing, home textiles, and industrial applications has increased significantly as a result of changing consumer preferences in urban areas. This growth not only advances these industries but also strengthens India's position as a hub for the production of versatile, durable, and fashionable synthetic fibers that cater to the evolving needs of modern urban consumers.

Growing Demand for Sustainable Products Propels India's Polyester Filament Yarn Market Growth

The Indian Polyester Filament Yarn (PFY) market is currently experiencing significant growth, primarily driven by the growing demand for sustainable products. Polyester Filament Yarn, a versatile and durable synthetic fiber, has found widespread use in various industries, including textiles, apparel, home furnishings, and industrial applications. As India's consumers and industries increasingly prioritize sustainability, PFY has emerged as a key solution, offering eco-friendly and high-performance characteristics that contribute to the country's economic and environmental goals.

One of the significant factors propelling the growth of the PFY market in India is the textile and apparel industry's increasing emphasis on sustainability. A recent survey reveals that 60% of Indian consumers are actively opting for sustainable products, reflecting a significant shift towards sustainability. This trend highlights a growing consumer awareness of climate issues, which is increasingly influencing their purchasing decisions. PFY is known for its eco-friendly properties, such as being recyclable, energy-efficient in production, and possessing a lower carbon footprint compared to some natural fibers. As global awareness of sustainable fashion and textiles grows, Indian consumers and manufacturers are actively seeking alternatives that align with environmentally responsible practices. PFY, often blended with natural fibers, provides a sustainable solution for producing clothing, fabrics, and textiles with a reduced environmental impact.

The home furnishing and interior design sectors are also contributing to the growth of the PFY market in India. Consumers are increasingly looking for sustainable and long-lasting materials for their homes. PFY offers advantages such as resistance to wear and tear, ease of maintenance, and resistance to moisture, making it a suitable choice for upholstery, curtains, carpets, and bedding. The demand for sustainable and durable home furnishing products has led to an increased use of PFY in these applications.

Furthermore, the industrial applications of PFY are on the rise in India. The textile and automotive industries, for example, use PFY for the production of airbags, safety belts, and technical textiles. The versatile and high-strength nature of PFY makes it a reliable choice for such applications, ensuring safety and performance. In addition, the demand for PFY in industrial applications is driven by its cost-effectiveness and ability to meet stringent quality and safety standards.

The packaging industry is yet another sector experiencing growth in the utilization of PFY. Sustainable packaging solutions are increasingly important, especially as India's e-commerce industry expands rapidly. PFY is used for manufacturing a variety of packaging materials, such as straps, ribbons, and nets. These materials provide

strength, durability, and the ability to be recycled, aligning with the demand for eco-friendly and sustainable packaging options.

The growth of the PFY market in India has prompted investments in expanding production capacities and the development of advanced technologies to meet the growing demand for sustainable products. A reliable supply of high-quality PFY is essential for manufacturers in various industries, as they depend on this synthetic fiber to meet consumer expectations and industry standards for sustainability and durability.

Hence, the growing demand for sustainable products is propelling the growth of the Polyester Filament Yarn market in India. As consumers and industries prioritize environmentally responsible and high-performance materials, PFY has emerged as a key solution in various applications, including textiles, apparel, home furnishings, and industrial sectors. This growth not only advances these industries but also strengthens India's position as a hub for the production of versatile, durable, and eco-friendly synthetic fibers that cater to the evolving needs of modern consumers and contribute to the sustainability goals of the country.

Growing Demand for Applications in Technical Textiles is Propelling the India Polyester Filament Yarn Market Growth

The Indian Polyester Filament Yarn (PFY) market is currently experiencing substantial growth, primarily driven by the growing demand for applications in technical textiles. Polyester Filament Yarn, a versatile and durable synthetic fiber, is increasingly being utilized in various industries, particularly in the technical textiles sector. These specialized textiles are designed to serve specific functional or technical purposes, such as durability, strength, flame resistance, or advanced performance characteristics. As India's industries expand and diversify, the demand for PFY in technical textiles has surged, making it a key driver of market growth.

Technical textiles play a pivotal role in a wide range of industries, including automotive, construction, agriculture, healthcare, and sports. PFY's exceptional properties, including strength, durability, and versatility, make it a preferred choice for manufacturing technical textiles. The automotive sector, in particular, has witnessed significant growth in the use of technical textiles for applications such as airbags, seatbelts, automotive upholstery, and interior components. PFY's high-strength properties are crucial for ensuring the safety and performance of these textiles, contributing to the growth of the market. The construction industry is another sector where technical textiles play a vital role, with applications ranging from geotextiles for soil stabilization to architectural

membranes for weather protection. The durability and resistance to environmental factors make PFY an ideal choice for these applications. As India invests in infrastructure development and urbanization, the demand for technical textiles in construction is on the rise, driving the need for PFY.

Agriculture is yet another sector that relies on technical textiles for various applications, such as crop protection, irrigation, and agro-textile products. PFY's resistance to wear and tear, as well as its ability to withstand outdoor conditions, make it suitable for manufacturing technical textiles used in agriculture. With the focus on improving agricultural productivity and sustainability in India, the demand for PFY in this sector has grown significantly. In the healthcare industry, technical textiles are used for applications like wound care products, surgical gowns, and medical equipment. PFY's ability to provide comfort and durability in healthcare textiles is crucial for patient care and infection control. The increasing emphasis on healthcare infrastructure and quality services has contributed to the growing demand for PFY in healthcare-related technical textiles. The sports and outdoor industry also benefits from the use of technical textiles for applications such as sports apparel, gear, and accessories. PFY's properties, including moisture-wicking, breathability, and lightweight characteristics, make it an ideal choice for manufacturing high-performance sports textiles. As sports and outdoor activities gain popularity in India, the demand for technical textiles incorporating PFY continues to grow.

The growth of the PFY market in India has led to investments in expanding production capacities and developing innovative solutions to meet the diverse needs of technical textiles. A reliable supply of high-quality PFY is essential for manufacturers in various industries, as they depend on this synthetic fiber to meet industry standards and ensure the durability and performance of technical textiles. The growing demand for applications in technical textiles is propelling the growth of the Polyester Filament Yarn market in India. As industries such as automotive, construction, agriculture, healthcare, and sports continue to expand and seek high-performance solutions, PFY has become an essential material in the production of technical textiles. This growth not only advances these industries but also strengthens India's position as a hub for the production of versatile, durable, and high-performance synthetic fibers that cater to the evolving needs of modern technical textiles.

Key Market Challenges

Volatility in Raw Material Prices

The volatility in raw material prices, particularly in the petrochemical sector, is a significant obstacle to the growth of the Polyester Filament Yarn (PFY) market in India. PFY, a crucial component in the textile industry, is primarily produced from petrochemical-derived feedstocks, such as purified terephthalic acid (PTA) and mono ethylene glycol (MEG). These feedstock prices are closely linked to the global energy market, and factors like fluctuating oil prices, supply-demand imbalances, and geopolitical events can lead to unpredictable price fluctuations. The instability in raw material costs directly affects the production expenses of PFY, making it challenging for manufacturers to maintain competitive pricing and profit margins. This price volatility disrupts production planning and can lead to market instability.

To mitigate these challenges and promote growth in the India PFY market, stakeholders should consider strategies such as diversifying sourcing options, entering into long-term supply agreements, and implementing effective inventory management. These measures are crucial for maintaining market competitiveness and fostering sustainable growth, even in the face of raw material price fluctuations.

Intense Competition with several Domestic and International players

Intense competition with numerous domestic and international players is a formidable hindrance to the growth of the Polyester Filament Yarn (PFY) market in India. PFY, a crucial textile component, faces a saturated marketplace with a multitude of manufacturers, both domestic and international. These players often offer a wide range of PFY products, leveraging economies of scale, advanced technology, and diverse product portfolios. This competitive landscape puts immense pressure on local PFY manufacturers, impacting their pricing strategies and profit margins. The influx of international players adds to the competition, as they can offer cost-competitive alternatives due to varying production costs and global market access.

To counter this challenge and stimulate growth in the India PFY market, domestic manufacturers must emphasize innovation, product quality, and operational efficiency. They can also explore strategic collaborations and partnerships, differentiate their products, and invest in niche segments to maintain market share and competitiveness in a fiercely contested marketplace.

Key Market Trends

Growing Awareness of Sustainable Polyester Filament Yarn Production

The India Polyester Filament Yarn market is currently witnessing substantial growth, and a pivotal trend within this market is the growing awareness of sustainable production practices for polyester filament yarn. Polyester filament yarn is a widely used synthetic textile material, prized for its versatility, strength, and durability. The increasing emphasis on sustainable production methods is driven by several significant factors and is contributing to the expansion of the Polyester Filament Yarn market.

One of the primary drivers of this trend is the escalating global awareness of environmental sustainability and the textile industry's environmental footprint. Consumers and industries are becoming increasingly conscious of the need to reduce environmental impact. Sustainable production processes for polyester filament yarn, including reduced water and energy consumption, eco-friendly dyeing techniques, and recycling initiatives, align with these environmental concerns. Stringent regulations and certifications have gained prominence in the textile industry. Compliance with these standards is essential to meet legal requirements and consumer expectations. Sustainable polyester filament yarn production methods enable manufacturers to achieve certifications that validate their commitment to eco-friendly practices and meet the requirements of responsible textile production.

Thus, the competitive landscape of the global textile market is pushing the adoption of sustainable practices. Manufacturers are focusing on creating eco-friendly yarns and textiles that cater to the needs of environmentally conscious consumers and environmentally responsible brands. Sustainable polyester filament yarn not only meets consumer demand but also enhances the market position and competitiveness of Indian manufacturers in the global textile industry. The growing awareness of sustainable polyester filament yarn production is a key driver for the growth of the India Polyester Filament Yarn market. As the textile industry continues to evolve, driven by environmental concerns and changing consumer preferences, the adoption of eco-friendly manufacturing practices positions India as a dynamic player in the global market. This trend significantly contributes to the expansion of the Polyester Filament Yarn market and reinforces the nation's commitment to sustainable and responsible textile manufacturing.

Favorable Government Initiatives

The India Polyester Filament Yarn (PFY) market is currently experiencing significant growth, and a crucial trend driving this expansion is the presence of favorable government initiatives. These initiatives play a pivotal role in bolstering the PFY market by providing essential support, incentives, and regulations that foster growth and

development within the sector.

One of the primary drivers of this trend is the Indian government's 'Make in India' campaign, which aims to promote domestic manufacturing and reduce reliance on imports. Under this initiative, various policies, incentives, and schemes have been introduced to encourage investment in the textile and apparel industry. This includes the textile production-linked incentive (PLI) scheme, which offers financial incentives for manufacturers to increase their production capacity, contributing to the growth of PFY manufacturing in the country.

Furthermore, the focus on increasing textile and apparel exports is also supported by government schemes, such as the Rebate of State and Central Taxes and Levies (RoSCTL). These initiatives provide export incentives and help Indian PFY manufacturers become more competitive in the global market. Environmental sustainability is a key concern, and the government is promoting responsible textile manufacturing. The introduction of schemes that encourage sustainable practices, including the use of eco-friendly dyes and chemicals, energy-efficient machinery, and waste reduction measures, has a positive impact on the PFY industry. Compliance with these sustainable practices enhances the reputation of Indian manufacturers in the global market. The presence of favorable government initiatives is a key driver for the growth of the India Polyester Filament Yarn market. As the government continues to prioritize the growth of the textile and apparel industry, the PFY sector stands to benefit significantly. These initiatives not only promote domestic manufacturing but also encourage sustainability, export growth, and overall industry development, reinforcing India's position as a competitive region in the global textile and PFY market.

Segmental Insights

Type Insights

Based on the type, the partially oriented yarn segment emerged as the dominant segment in the Indian market for Polyester Filament Yarn in 2023, primarily due to the versatility and extensive applications of POY in various industries, particularly in the textile and apparel sector. POY is a type of Polyester Filament Yarn that is known for its versatility and flexibility. It is widely used in textile manufacturing for producing a wide range of products, including fabrics, garments, home textiles, and industrial textiles. POY's adaptability to different textile processes and its ability to meet various requirements of the textile and apparel industry have made it the preferred choice for many manufacturers.

The Indian textile and apparel sector has experienced significant growth, driven by increasing consumer demand and the expansion of the country's retail industry. As a result, the demand for POY has surged, making it the dominant type in the Polyester Filament Yarn market. POY is used in various textile applications, such as knitting, weaving, and dyeing, allowing manufacturers to produce a diverse array of products to cater to the needs of both domestic and international markets. Its ease of processing and cost-effectiveness have further solidified its position as the dominant segment in the Indian market.

Regional Insights

Based on the region, the West region has asserted its dominance, marking its significance in the production and distribution of this crucial textile material. This regional prominence can be attributed to a combination of factors, including well-established industrial clusters, proximity to key resources, and access to transportation networks. The West region, particularly the states of Gujarat and Maharashtra, is home to a substantial portion of India's textile and synthetic fiber manufacturing facilities. These states boast well-developed industrial infrastructure, including specialized parks and clusters dedicated to the textile and apparel industry. These facilities have been instrumental in the production of Polyester Filament Yarn and related textile products.

The West region benefits from its strategic location near major ports and petrochemical complexes. This positioning allows for efficient access to raw materials like polyester chips and polyester polymer, which are essential for the production of Polyester Filament Yarn. The proximity to these resources ensures a stable and cost-effective supply chain for manufacturers.

The skilled workforce and business-friendly environment in the West region have further contributed to its dominance in the Polyester Filament Yarn market. This region is known for its innovation in textile manufacturing and its ability to meet the evolving demands of the textile and apparel industry. As the textile and apparel sectors continue to grow in India, the West region's dominance in the Polyester Filament Yarn market is expected to persist, making it a key contributor to the country's textile and apparel manufacturing landscape.

Key Market Players

Reliance Industries Limited

IndoRama Synthetics (India) Ltd

AYM Syntex Limited

Wellknown Polyester Ltd.

Swami Palaniandavar Spinners India Pvt Ltd

Report Scope:

In this report, the India Polyester Filament Yarn Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Polyester Filament Yarn Market, By Type:

Partially Oriented Yarn

Polyester Fully Drawn Yarn

Polyester Drawn Textured Yarn

India Polyester Filament Yarn Market, By Application:

Apparel

Industrial

Household Textiles

Others

India Polyester Filament Yarn 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 Polyester Filament Yarn Market.

Available Customizations:

India Polyester Filament Yarn 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).

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