

India Hydrogen Peroxide Market, By Grade (<35%, >35%), By Type (Disinfectant, Bleaching Agent, Others), By Application (Pulp & Paper, Chemical Synthesis, Textile, Bleaching, Water Purification, Home & Personal Care, Specialty Chemicals, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

Market Report | 2024-09-13 | 82 pages | TechSci Research

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Report description:

India Hydrogen Peroxide Market achieved a total market volume of 141.32 Thousand Metric Tonnes in 2024 and is poised for strong growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 2.77% through 2030. Hydrogen peroxide, a chemical compound with the formula H₂O₂, is a versatile chemical with numerous applications in various industries. It serves as a powerful oxidizer, disinfectant, and bleaching agent. The Indian hydrogen peroxide market has witnessed significant growth due to the country's expanding industrial base, increasing awareness of hygiene and sanitation, and the demand for eco-friendly bleaching agents. The local players of India has benefitted from the imposition of an anti-dumping duty on hydrogen peroxide imports from six countries likes Bangladesh, Taiwan, South Korea, Indonesia, Pakistan, and Thailand. This duty, effective for a period of five years, has impacted the Indian market where imports account for nearly 20% of hydrogen peroxide demand. Since early June 2017, domestic hydrogen peroxide prices have increased and have remained stable at these elevated levels. The Indian hydrogen peroxide market has experienced substantial growth in recent years. Hydrogen peroxide is a versatile chemical used in applications ranging from paper and pulp bleaching to disinfection and water treatment. Its importance is underscored by its role in a wide array of industries, from textiles to healthcare. The paper and pulp sector are a significant driver of the hydrogen peroxide market in India. Hydrogen peroxide is used for bleaching wood pulp, enhancing paper quality, and reducing environmental impact. As India's paper and pulp capacity expands, so does the demand for hydrogen peroxide. Hydrogen peroxide is used in the textile industry for bleaching and disinfection. As India's textile sector grows, the demand for hydrogen peroxide in textile processing applications has increased. The healthcare sector relies on hydrogen peroxide for disinfection and sterilization. The heightened focus on hygiene and sanitation, particularly in healthcare facilities, has driven the demand for hydrogen peroxide. Hydrogen peroxide is employed in water treatment for its disinfection and oxidation properties.

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The increasing need for clean and safe water sources has led to higher consumption of hydrogen peroxide in water treatment. Hydrogen peroxide is a highly reactive chemical that requires careful handling and storage. Adherence to stringent safety protocols is imperative to mitigate risks. The production and use of hydrogen peroxide can have environmental implications, particularly in terms of waste disposal and emissions. Regulatory compliance and responsible disposal are vital challenges. There is a growing emphasis on adopting green and sustainable practices in hydrogen peroxide production. The industry is exploring cleaner and more environmentally friendly production methods. The COVID-19 pandemic has highlighted the importance of disinfection and sanitization in various industries. Hydrogen peroxide is being increasingly used for these purposes, influencing its demand.

The competitive landscape of hydrogen peroxide production in India is marked by significant contributions from NPL, capacity expansions by Gujarat Alkalies, and potential new entrants like Meghmani Organics and Chemplast Sanmar. This dynamic environment underscores the importance of technological advancements and capacity enhancements in maintaining competitive advantage and meeting the rising demand in the market. National Peroxide Limited (NPL) stands as the largest producer of hydrogen peroxide in India, renowned in the industry for its pioneering efforts and strong brand image. NPL has been at the forefront of technological advancements in hydrogen peroxide manufacturing, significantly contributing to the development of the domestic market through its efforts in new applications. As of March 31, 2017, the total production capacity of the four hydrogen peroxide producers in India is estimated at 219,500 MTPA. The domestic demand for hydrogen peroxide is projected to grow by 5-6% during 2017-18, indicating a robust market expansion. Among the competitors, Gujarat Alkalies and Chemicals Limited has announced plans to increase its production capacity by 15,000 MTPA, adding to its existing capacity of 39,000 tonnes. This new capacity is expected to become operational during FY19, positioning Gujarat Alkalies as a significant player in the market with enhanced production capabilities. Moreover, Meghmani Organics and Chemplast Sanmar have shown interest in establishing hydrogen peroxide plants in India. These new entrants indicate a competitive and evolving landscape, with increased investments and capacity expansions aimed at meeting the growing domestic demand.

Key Market Drivers

Growing Demand from Paper and Pulp Industry as Bleaching and Disinfection Propels India Hydrogen Peroxide Market Growth

The paper and pulp industry are the primary consumer of hydrogen peroxide in India, significantly driving the market's growth. The Indian paper industry, encompassing over 750 pulp and paper mills, has been expanding and evolving to meet increasing domestic demand. While only 50 of these mills have a capacity of 50,000 metric tonnes per annum or more, the overall industry has been performing well, particularly in the last few quarters. The notable trend is the shift in demand within the paper industry. Although the demand for newsprint paper has declined as readers move online, the rise in online consumer purchases has spurred growth in transport packaging demand. This shift has positively impacted the paper and pulp industry's performance, subsequently boosting the demand for hydrogen peroxide.

Hydrogen peroxide plays a crucial role in the paper manufacturing process, primarily used to facilitate the preparation of paper through bleaching and oxidation. This chemical is highly valued for its versatility, capable of functioning as an oxidizer across a variety of oxidation possibilities and pH ranges. Consequently, almost all paper and pulp manufacturers in India incorporate hydrogen peroxide into their production processes. The industry's expansion is evident in the significant investments made to increase production capacity. By 2015, paper mills had added over 3 million tonnes of annual production capacity in printing and writing paper, investing approximately \$5 billion. This expansion elevated the total production capacity to 12 million tonnes, which has since been absorbed by the market. The overall domestic demand for paper, including newsprint, is estimated at about 15 million tonnes per annum (TPA). Specific segments within the paper industry are experiencing robust growth. For instance, tissue paper demand, currently estimated at just over 100,000 tonnes a year, is growing at nearly 17%. Similarly, the packaging board demand is estimated at 7.5 million tonnes, growing at 9.4%, while printing and writing paper demand stands at about 4.6 million tonnes, growing at around 5% annually. Overall, the demand for paper in India is growing at approximately 6% per year, with the domestic market/consumption exceeding 16 million tonnes per annum, including over 2 million tonnes of imports. Several factors have contributed to the improved performance of the paper industry. Increased demand, coupled with the softening of raw material costs and lower coal prices, has bolstered the industry's growth. In addition, the rising focus on education in India is expected to further drive demand. Industry projections suggest that the compound annual growth rate (CAGR) of the Indian paper industry will be around 7% over the next five years. Demand is anticipated to reach 20 million tonnes, up from 13.9 million tonnes

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in 2014-15.

This growing demand presents a significant opportunity for hydrogen peroxide producers like National Peroxide Limited (NPL) and its peers. As the paper and pulp industry continues to expand and evolve, the need for hydrogen peroxide in bleaching and disinfection processes will likely increase, propelling the hydrogen peroxide market in India to new heights. The paper and pulp industry's robust growth is a major driver of the hydrogen peroxide market in India. The industry's increasing capacity, shifting demand patterns, and focus on quality and efficiency underscore the importance of hydrogen peroxide in maintaining and enhancing production processes. As the Indian paper industry continues to grow, so too will the demand for hydrogen peroxide, creating substantial opportunities for market players.

Rising Demand for Healthcare and Disinfection from Healthcare Industry Propels India's Hydrogen Peroxide Market Growth

The Indian hydrogen peroxide market is experiencing significant growth, primarily driven by the increasing demand from the healthcare industry. Hydrogen peroxide, a versatile and powerful chemical compound, plays a pivotal role in various healthcare applications, including disinfection and sterilization, which is contributing to the expansion of India's hydrogen peroxide market. One of the key factors contributing to the surge in demand for hydrogen peroxide in India is its essential role in healthcare settings for disinfection and sterilization purposes. Healthcare facilities, including hospitals, clinics, dental offices, and laboratories, rely on hydrogen peroxide as a potent disinfectant and sterilizing agent. It is used to clean and disinfect surfaces, medical equipment, and instruments to prevent the spread of infections and maintain a sterile environment. As the healthcare industry continues to prioritize patient safety and infection control, the demand for hydrogen peroxide remains robust. Hydrogen peroxide is a trusted solution for healthcare professionals, as it is effective against a wide range of microorganisms, including bacteria, viruses, and spores. Its broad-spectrum disinfection capabilities make it an indispensable tool for maintaining high hygiene standards and protecting patients and healthcare workers. Hydrogen peroxide is also used for the sterilization of medical devices and equipment. Sterilization is crucial in healthcare to ensure the safety of patients and the effectiveness of medical procedures. Hydrogen peroxide is employed in sterilization processes such as hydrogen peroxide vapor sterilization, which is used for heat-sensitive medical instruments and equipment. As the demand for sterilized medical devices and instruments grows, the demand for hydrogen peroxide in healthcare settings increases accordingly. Hydrogen peroxide is used in wound care products and antiseptics. It is applied to clean and disinfect wounds and to prevent or treat infections. The demand for hydrogen peroxide in wound care and antiseptic products is driven by the need for effective and safe solutions for wound management.

Hydrogen peroxide is a critical component in the healthcare sector's efforts to meet high standards for hygiene, infection control, and patient safety. In the context of the ongoing global health challenges, the importance of effective disinfection and sterilization has been further underscored, which is expected to sustain the demand for hydrogen peroxide in healthcare applications. COVID-19 pandemic has heightened the awareness of the importance of disinfection and infection control in healthcare facilities. This has led to an increased demand for hydrogen peroxide-based disinfectants and sanitizers, particularly for high-touch surfaces and patient care areas. As healthcare facilities continue to prioritize stringent hygiene and infection control measures, the demand for hydrogen peroxide is projected to remain strong. The growth of India's healthcare industry, encompassing hospitals, clinics, diagnostic laboratories, and medical manufacturing, is a significant driver behind the increasing demand for hydrogen peroxide. The healthcare sector relies on hydrogen peroxide for its disinfection and sterilization properties, essential for maintaining patient safety and infection control. As the healthcare industry continues to expand and adapt to evolving healthcare needs, the demand for hydrogen peroxide is expected to continue to rise.

Increasing Acceptance from Water Treatment Propelling the India Hydrogen Peroxide Market Growth

The Indian hydrogen peroxide market is witnessing substantial growth, primarily propelled by the increasing acceptance of hydrogen peroxide as a critical component in water treatment processes. Hydrogen peroxide, a versatile and powerful chemical compound, plays a pivotal role in water treatment and purification, contributing to the expansion of India's hydrogen peroxide market. One of the key factors contributing to the surge in demand for hydrogen peroxide in India is its essential role in water treatment for the removal of impurities and disinfection. Water treatment facilities, municipalities, and industries rely on hydrogen peroxide as an oxidizing and disinfecting agent to ensure the safety and quality of water. It is used for the oxidation of various contaminants, including organic matter, metals, and sulfur compounds, making the water suitable for consumption and various industrial applications. As the importance of clean and safe water sources grows, the demand for hydrogen peroxide in water

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treatment remains strong.

Hydrogen peroxide is used for the removal of organic contaminants from water sources, including lakes, rivers, and groundwater. These organic contaminants may include natural organic matter, algae, and microorganisms. By breaking down and oxidizing these contaminants, hydrogen peroxide plays a vital role in ensuring the water's purity and safety for consumption. The quality of water is a primary concern for municipalities and industries, and the demand for effective water treatment solutions is increasing. Hydrogen peroxide is employed in the removal of heavy metals from water. Heavy metals, such as iron, manganese, and arsenic, can be present in water sources and pose health and environmental risks. Hydrogen peroxide is used to oxidize and precipitate these metals, allowing for their removal through filtration and sedimentation processes. As industrial activities and urbanization increase, the demand for effective heavy metal removal from water also rises. Hydrogen peroxide is a key disinfectant used in water treatment to eliminate harmful microorganisms, including bacteria, viruses, and algae. Disinfection is a critical step in ensuring that water is safe for human consumption. The disinfection properties of hydrogen peroxide make it an essential component in the treatment of drinking water, swimming pool water, and wastewater. As concerns over waterborne diseases and the need for safe water supplies continue to grow, the demand for hydrogen peroxide in water disinfection is expected to remain strong.

Hydrogen peroxide is used in wastewater treatment processes for both industrial and municipal wastewater. Wastewater treatment facilities utilize hydrogen peroxide to reduce and remove pollutants and contaminants before discharging the treated water into the environment. As environmental regulations become more stringent, the need for effective wastewater treatment solutions has increased, driving the demand for hydrogen peroxide. The growth of India's industrial and urban sectors, including manufacturing, construction, and urban development, is a significant driver behind the increasing demand for hydrogen peroxide in water treatment. These sectors generate wastewater and pollutants that require effective treatment, contributing to the expansion of the hydrogen peroxide market.

Key Market Challenges

Stringent Environmental Regulations

Stringent environmental regulations are proving to be a significant impediment to the growth of the India Hydrogen Peroxide market. Hydrogen peroxide is a versatile chemical widely used in industries such as pulp and paper, textiles, and healthcare. However, its production and applications are associated with environmental concerns, particularly in terms of waste management and emissions. Environmental regulations governing the safe disposal of waste materials and the reduction of emissions during hydrogen peroxide production have become increasingly strict. These regulations necessitate substantial investments in cleaner technologies, waste treatment systems, and compliance measures, increasing operational costs for manufacturers and hindering market growth. To overcome this challenge, the India Hydrogen Peroxide market must prioritize the adoption of cleaner and sustainable production practices, invest in advanced environmental control technologies, and work closely with regulatory authorities to ensure compliance. Collaboration with industry stakeholders and government agencies can help promote responsible and sustainable production, ensuring the long-term viability of the market despite stringent environmental regulations.

Lack of Awareness About the Benefits of Hydrogen Peroxide

The lack of awareness about the benefits of hydrogen peroxide is a notable hindrance to the growth of the India Hydrogen Peroxide market. Hydrogen peroxide is a versatile chemical with applications ranging from disinfection and water treatment to textiles and healthcare. However, a significant portion of potential consumers and industrial users remains unaware of its wide array of uses and benefits. Many industries in India are still reliant on traditional chemicals and processes, often unaware that hydrogen peroxide could offer safer, more effective, and environmentally friendly solutions. Educating businesses, manufacturers, and the general public about the advantages of hydrogen peroxide in terms of its disinfectant properties, eco-friendliness, and versatility is essential to expanding its market presence. To address this challenge, the India Hydrogen Peroxide market must invest in awareness campaigns, marketing efforts, and educational initiatives. Collaborations between industry stakeholders, trade associations, and government organizations can help raise awareness about the benefits of hydrogen peroxide, driving its adoption and market growth in India.

Key Market Trends

Development of New Hydrogen Peroxide-Based Products

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The development of new hydrogen peroxide-based products is a key trend propelling the growth of the India Hydrogen Peroxide market. Hydrogen peroxide is a versatile chemical compound widely used as a disinfectant, bleaching agent, and oxidizing agent in various industries, including healthcare, textiles, pulp and paper. The market's expansion is closely linked to continuous research and development efforts focused on harnessing the unique properties of hydrogen peroxide to create innovative and eco-friendly solutions. Researchers and manufacturers are exploring novel applications and formulations of hydrogen peroxide to address a wide array of industry needs. These innovations include advanced cleaning products, eco-friendly disinfectants, and greener bleaching solutions, catering to the increasing demand for sustainable and effective chemicals. This trend aligns with India's commitment to adopting more environmentally friendly and sustainable manufacturing practices. As the nation strives to reduce its environmental footprint and promote eco-conscious products, the development of new hydrogen peroxide-based solutions offers a compelling answer to the evolving needs of diverse industries. The trend of developing new hydrogen peroxide-based products highlights the adaptability and innovation within the India Hydrogen Peroxide market. It supports the nation's goals of sustainability and responsible chemical usage while addressing the diverse demands of multiple industries.

Growing Demand for Green Hydrogen Peroxide

The growing demand for green hydrogen peroxide is a pivotal trend driving the growth of the India Hydrogen Peroxide market. Hydrogen peroxide, a versatile chemical compound used in various industries, is now being sought after for its potential to promote sustainability and environmental responsibility. Green hydrogen peroxide is produced using environmentally friendly methods and is becoming increasingly popular as industries and consumers alike place a premium on eco-conscious products and practices. Green hydrogen peroxide typically involves cleaner manufacturing processes, reduced waste, and minimized environmental impact. These sustainable practices align with India's commitment to responsible manufacturing and reduced ecological footprints. As the nation strives for more eco-friendly and sustainable industrial practices, the demand for green hydrogen peroxide is on the rise. End-users in various sectors, including the healthcare and food industries, are actively seeking green and sustainable products. Green hydrogen peroxide meets these criteria, providing a solution that ensures product safety and environmental responsibility. This trend underscores the pivotal role of green hydrogen peroxide in the India Hydrogen Peroxide market. It not only caters to the shifting preferences of consumers and industries but also reflects the market's commitment to sustainability and eco-conscious manufacturing practices, contributing to the nation's objectives for a cleaner and greener future.

Segmental Insights

Type Insights

Based on the Type, the disinfectant segment emerged as the dominant segment in the Indian market for Hydrogen Peroxide in 2024. The dominance of the disinfectant segment can be attributed to the versatile and critical uses of Hydrogen Peroxide as a disinfectant and antiseptic. Hydrogen Peroxide is widely used for disinfecting surfaces, wound care, and as an antiseptic for various medical and healthcare applications. Its reliability, consistency, and effectiveness in killing harmful microorganisms make it an indispensable component in these applications. India's growing healthcare and pharmaceutical industries, as well as the increasing focus on hygiene and sanitation in various settings, have significantly driven the demand for disinfectants containing Hydrogen Peroxide, reinforcing the prominence of the disinfectant segment. The segment's dominance is also underscored by the increasing importance of infection control and prevention, especially in healthcare facilities and various public spaces, where the use of Hydrogen Peroxide-based disinfectants is integral to ensuring safety and hygiene.

Application Insights

Based on application, the water purification segment is projected as the dominant segment. It is a result of its critical role in ensuring access to clean and safe water, its alignment with the nation's growing focus on water quality and environmental standards, and its contribution to public health and environmental sustainability. This dominance is expected to persist as the need for clean water and water treatment continues to grow. The dominance of the water purification segment can be attributed to the versatile and critical uses of Hydrogen Peroxide in water treatment processes. Hydrogen Peroxide is a key component in water purification and treatment systems, where it is used to disinfect and remove impurities from drinking water, wastewater, and industrial process water. Its reliability, consistency, and effectiveness in eliminating contaminants make it an essential ingredient in these applications. As access to clean and safe drinking water becomes an increasing concern in India, the demand for water purification solutions has grown substantially. The water purification segment aligns with the nation's focus on improving

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water quality and ensuring access to safe drinking water for its population, reinforcing its dominance. Hydrogen Peroxide's role in water treatment and purification supports the environmental and health standards required for compliance with regulations, making it a pivotal component in meeting water quality guidelines.

Regional Insights

Based on region in the Indian market for hydrogen peroxide, the dominance of the Western region in the Indian Hydrogen Peroxide 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 manufacturing sectors and as the demand for high-quality chemicals remains on the rise, particularly in applications like textiles, pharmaceuticals, and chemicals. The primary reasons for the Western region's dominance is its industrial strength and the presence of significant manufacturing sectors, including chemicals, textiles, and pharmaceuticals. States like Gujarat and Maharashtra are home to a substantial number of manufacturing facilities that rely on Hydrogen Peroxide for various applications, such as textile bleaching, chemical synthesis, and pharmaceutical production. The region's well-established industrial infrastructure, research and development facilities, and a conducive environment for manufacturing have played a pivotal role in its prominence.

The Western region's proactive approach to environmental regulations and its commitment to sustainability have also driven the demand for Hydrogen Peroxide, especially in industries that prioritize eco-friendly and high-quality production processes. The Western region's strategic location and access to major ports make it a hub for the import and distribution of chemicals like Hydrogen Peroxide, serving industries not only within the region but also across the country.

Key Market Players

- National Peroxide Limited
- Indian Peroxide Ltd
- Nilkanth Organics Pvt. Ltd.
- Bhagwati Chemicals Co.
- Gujarat Alkalies and Chemicals Ltd (GACL)

Report Scope:

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

□ India Hydrogen Peroxide Market, By Grade:

- o <35%
- o >35%

□ India Hydrogen Peroxide Market, By Type:

- o Disinfectant
- o Bleaching Agent
- o Others

□ India Hydrogen Peroxide Market, By Application:

- o Pulp & Paper
- o Chemical Synthesis
- o Textile
- o Bleaching
- o Water Purification
- o Home & Personal Care
- o Specialty Chemicals
- o Others

□ India Hydrogen Peroxide Market, By Region:

- o West India
- o North India
- o South India
- o East India

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Competitive Landscape

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

Available Customizations:

India Hydrogen Peroxide 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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