

India Ethylene Dichloride Market By Production Process (Direct Chlorination and Oxy Chlorination), By Application (Vinyl Chloride Monomers, Ethylene Amines, Chlorinated Solvents, Degreasers, Paint Remover, Rubber & Plastics and Others) By Region, Competition, Forecast and Opportunities, 2020-2030F

Market Report | 2024-10-04 | 86 pages | TechSci Research

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Report description:

India Ethylene Dichloride Market achieved a total market volume of 364.75 thousand Metric Tonnes in 2024 and is poised for strong growth in the forecast period to reach 451.10 thousand Metric Tonnes, with a projected Compound Annual Growth Rate (CAGR) of 3.64% through 2030.

India's Ethylene Dichloride (EDC) market is experiencing remarkable growth, reflecting the country's increasing prominence in the global chemical industry. EDC, a critical chemical compound with diverse applications, is essential in sectors such as plastics, PVC production, and agrochemicals. This comprehensive research paper provides a detailed market overview of the EDC sector in India, delving into its current status, market dynamics, key players, applications, challenges, and future prospects. The EDC market in India has witnessed significant changes over the years. Historically, it primarily served domestic demand, supporting industries like plastics and chemicals. However, with India's rapid industrialization and globalization, the market's landscape has evolved. Today, India not only consumes EDC but also produces it on a substantial scale, firmly establishing its position in the global chemical industry. The versatility of EDC is a pivotal driver of its demand and serves as a fundamental component in the production of polyvinyl chloride (PVC), a material widely used in construction, automotive, packaging, and healthcare sectors. Additionally, EDC is integral to the agrochemical industry for the production of pesticides and herbicides.

Several factors contribute to the escalating demand for EDC in India. The robust growth in the construction and automotive sectors fuels the need for PVC, a crucial product derived from EDC. The agrochemical industry relies on EDC for the production of pesticides and herbicides, supporting India's agriculture sector. While the EDC market in India displays immense potential, it also faces notable challenges. Price volatility of raw materials, environmental regulations, and the need for sustainability are key challenges. The price fluctuations of raw materials, particularly ethylene, can impact production costs. Compliance with stringent

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environmental regulations and a growing emphasis on eco-friendly practices are pushing the industry to adopt cleaner and more sustainable production methods.

As environmental consciousness grows, regulations concerning emissions, waste disposal, and worker safety have become more stringent. The EDC industry in India is responding by adopting eco-friendly production processes, focusing on reducing emissions, and improving waste management. These measures not only meet regulatory requirements but also align with global sustainability goals. The Indian EDC market is witnessing several notable trends. Manufacturers are exploring innovative technologies to enhance the sustainability of EDC production and to reduce the environmental impact. The industry is focusing on the development of advanced PVC products with improved performance and reduced environmental footprint.

The future outlook for the Ethylene Dichloride market in India is promising. With continued growth in industries that rely on EDC, such as construction, automotive, and agrochemicals, the demand for this chemical is expected to remain robust. The industry's adaptability to changing market dynamics, regulatory requirements, and environmental consciousness will be crucial in shaping its growth trajectory. The Ethylene Dichloride market in India presents a compelling narrative of growth, adaptation, and transformation. Its diverse applications across various sectors make it a crucial chemical in the country's industrial landscape. As the market faces challenges and embraces sustainability, it is poised to meet not only domestic demand but also contribute substantially to the global chemical industry. India's journey in the EDC market is a testament to its resilience, innovation, and commitment to sustainable practices.

Key Market Drivers

Growing Demand from Agrochemical Industry to Produce Pesticides and Herbicides Propels Indian Ethylene Dichloride Market Growth

The Indian Ethylene Dichloride (EDC) market is on the cusp of significant growth, largely propelled by the increasing demand from the agrochemical industry for the production of pesticides and herbicides. Ethylene Dichloride, a versatile chemical compound, plays a pivotal role in the formulation of agrochemicals, serving as a crucial component in various processes and products. The expanding influence of the agrochemical industry on the demand for EDC is expected to drive market growth and contribute to India's economic development.

The agrochemical industry in India is witnessing remarkable growth, driven by several factors, including increasing population, changing dietary habits, and the need for higher agricultural productivity. Ethylene Dichloride is a vital component in this sector, as it serves as a key raw material in the production of chlorinated pesticides and herbicides. These agrochemicals are essential for safeguarding crops from pests, diseases, and weeds, thereby ensuring higher crop yields and food security. As India's agriculture sector continues to expand and modernize, the demand for agrochemicals containing EDC as a crucial precursor is expected to experience robust growth. EDC plays a significant role in the production of soil fumigants used in agriculture. Soil fumigants are essential for controlling soilborne pathogens, nematodes, and weeds in agricultural fields, providing a disease-free and weed-free environment for plant growth. The growth of horticulture and cash crops in India has increased the need for effective soil fumigants, driving the demand for EDC as a key ingredient in these agricultural products.

Ethylene Dichloride is also employed in the manufacturing of plastic pipes used for irrigation and water supply in agriculture. The durability, corrosion resistance, and low cost of these pipes make them a preferred choice for the transportation of water in agricultural applications. As the need for efficient water management in agriculture grows, the demand for plastic pipes containing EDC in their production is on the rise. EDC serves as a critical ingredient in the production of protective agricultural films, including greenhouse films and mulch films. These films are used for crop protection, pest control, and soil conservation, enhancing the overall agricultural yield. As the adoption of protected agriculture practices continues to increase in India, the demand for these films, and consequently, EDC, is expected to surge.

As the agrochemical industry in India continues to thrive, the Ethylene Dichloride market is poised for substantial growth. Its diverse applications in the production of chlorinated agrochemicals, soil fumigants, plastic pipes, and protective agricultural films underscore its significance and wide-ranging uses in the agricultural sector. The increasing need for higher crop yields, disease and pest management, and efficient water use, coupled with the growth of India's agriculture sector, is expected to drive the demand for Ethylene Dichloride. This growth not only benefits the chemical industry but also plays a crucial role in supporting the broader economy by catering to the needs of an expanding agrochemical sector, pivotal for India's progress, food security, and rural development.

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Rising Construction and Automotive Sectors is Expected to Propel India's Ethylene Dichloride Market Growth

The Indian Ethylene Dichloride (EDC) market is on the brink of significant growth, primarily driven by the simultaneous expansion of the construction and automotive sectors. Ethylene Dichloride, a versatile chemical compound, serves as a fundamental building block in the formulation of various products in these sectors, making it an indispensable component in the rapidly evolving construction and automotive industries. The synergistic relationship between these sectors and the increasing demand for EDC in India is anticipated to propel the market's growth and contribute to the nation's economic development. The construction industry in India is currently experiencing a remarkable upswing, fueled by a combination of factors. Rising urbanization, population growth, and increased government investment in infrastructure projects have created a booming construction sector. Ethylene Dichloride plays a pivotal role in this industry, as it is a key ingredient in the formulation of various plastics and PVC (polyvinyl chloride) materials used for pipes, fittings, and insulation. PVC is highly valued in the construction industry for its durability, low cost, and resistance to corrosion, making it an ideal choice for various applications. As the construction sector continues to thrive, the demand for EDC is expected to surge, driving the growth of the chemical industry in India.

In parallel, the automotive sector in India is experiencing rapid expansion, driven by various factors. Increasing disposable incomes, a burgeoning middle class, and the government's push for electric and sustainable mobility solutions have led to a surge in demand for vehicles. Ethylene Dichloride is a key player in this sector, as it is a fundamental component in the production of PVC materials used in various automotive components, such as cables, gaskets, and interior trim. The inclusion of PVC not only improves the overall performance of these components but also increases their longevity, making them indispensable for the automotive industry. As India's automotive manufacturing sector and electric vehicle market continue to expand, the demand for PVC materials containing EDC is expected to witness robust growth. The Ethylene Dichloride market in India is also benefiting from the surge in real estate and infrastructure development. This is primarily due to the increasing demand for PVC materials, which necessitates a substantial volume of EDC. The construction of modern buildings, transportation networks, and smart cities relies heavily on PVC-based infrastructure. This further underscores the pivotal role of EDC in supporting large-scale construction endeavors. The automotive sector's growing emphasis on sustainability and reducing carbon emissions aligns with the use of PVC materials containing EDC, as they contribute to making vehicles more energy-efficient and environmentally friendly.

As the construction and automotive sectors continue to flourish in India, the Ethylene Dichloride market is poised for significant growth. The diverse applications of EDC in PVC materials, pipes, fittings, insulation, and automotive components make it a critical component in these industries. The ever-expanding infrastructure projects, real estate developments, and the surging demand for innovative and eco-friendly automotive solutions are set to drive the demand for Ethylene Dichloride in the coming years. This growth not only benefits the chemical industry but also contributes to India's overall economic development and modernization by supporting two pivotal sectors essential for the nation's progress.

Rising population and growing urbanization is Thrusting the India Ethylene Dichloride Market Growth

The Indian Ethylene Dichloride (EDC) market is experiencing substantial growth, primarily propelled by the rising population and growing urbanization across the country. Ethylene Dichloride, a versatile chemical compound, has emerged as a fundamental component in various applications, and its demand is closely linked to the dynamics of urbanization and the expanding population in India. The interplay between these factors and the increasing demand for EDC is expected to drive market growth and contribute to India's economic development. One of the primary drivers of EDC demand is the surge in urbanization. India is witnessing a rapid shift of the population from rural to urban areas, resulting in the construction of new urban infrastructure, residential complexes, and commercial developments. EDC plays a crucial role in the construction industry, as it is a key ingredient in the formulation of various plastics and PVC (polyvinyl chloride) materials used in pipes, fittings, insulation, and more. PVC is highly valued in construction for its durability, cost-effectiveness, and corrosion resistance, making it an ideal choice for various urban infrastructure and building applications. As cities continue to grow and modernize, the construction sector will remain a key driver for the EDC market. The growing population in urban areas leads to increased demand for consumer goods and services. The packaging industry, which provides the necessary containers and materials for a variety of products, relies heavily on PVC materials containing EDC. These materials are used to create items such as bottles, packaging films, and blister packs. The expansion of urban populations and their consumption patterns directly influence the packaging industry's growth, subsequently boosting the demand for EDC.

Another significant factor contributing to the increased demand for EDC is the expansion of the automotive industry. As

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urbanization continues, there is a growing need for efficient transportation systems and vehicles. Ethylene Dichloride is a vital component in the production of PVC materials used in automotive components like cables, gaskets, and interior trim. These PVC materials enhance the performance, safety, and longevity of automotive parts, making them essential in the automotive sector. The surge in the urban population's demand for vehicles, whether traditional or electric, drives the requirement for PVC materials containing EDC. The growing urban population leads to a greater need for modern housing, consumer electronics, and appliances. PVC materials and insulation materials containing EDC are widely used in wiring, cables, and appliances to provide electrical insulation and protection. The increased demand for urban housing and consumer products directly impacts the electrical and electronics sectors, consequently driving the EDC market.

The Ethylene Dichloride market also benefits from its use in various industrial applications, including metal cleaning and degreasing solutions. These solutions are essential for maintaining machinery and equipment in manufacturing, which is closely tied to urbanization and population growth trends. As industrialization and manufacturing activities expand, the demand for cleaning and degreasing products containing EDC increases. As India's population continues to grow and urbanize, the Ethylene Dichloride market is poised for substantial growth. Its diverse applications in construction, packaging, automotive, electronics, and industrial processes make it a critical component in urban development and modernization. The increasing urbanization and population growth trends, along with rising consumer demands, are expected to drive the demand for Ethylene Dichloride in the coming years. This growth not only benefits the chemical industry but also plays a vital role in supporting India's overall economic development and transformation as the country continues to urbanize and modernize.

Key Market Challenges

Stringent Environmental Regulation

Stringent environmental regulations have become a significant impediment to the growth of the Ethylene Dichloride market in India. Ethylene Dichloride, a key chemical compound primarily used in the production of PVC (polyvinyl chloride) resin, faces environmental scrutiny due to potential risks associated with its production, use, and disposal. In response to environmental concerns, Indian authorities have implemented stringent regulations to limit emissions, control waste, and ensure safe handling of this chemical. Compliance with these regulations requires substantial investments in pollution control technology, waste management, and continuous monitoring, thereby increasing operational costs for manufacturers. The administrative burden of regulatory reporting and adherence further adds to the industry's challenges, impacting its competitiveness and growth potential. These stringent regulations not only affect the existing Ethylene Dichloride manufacturers but also act as a deterrent for new entrants, hindering the expansion and innovation within the industry.

To support the growth of the Ethylene Dichloride market in India, there is a need for a collaborative approach involving regulatory bodies, industry players, and the government. This can entail finding a balance between environmental protection and industrial growth by promoting sustainable practices, incentivizing cleaner technologies, and streamlining regulatory processes, all of which can ensure a more favorable environment for the market's development.

Competition From Imports

Competition from imports has posed a significant obstacle to the growth of the Ethylene Dichloride market in India. Ethylene Dichloride is a crucial chemical used primarily in the production of polyvinyl chloride (PVC) resin, which is a versatile material used in various industries. However, the Indian market faces stiff competition from imported Ethylene Dichloride, often sourced from countries with lower production costs and favorable trade agreements. Imported Ethylene Dichloride products are typically priced more competitively, making it challenging for domestic manufacturers to maintain market share and pricing stability. This competition affects the profitability of local producers, hindering their growth prospects and often forcing them to reduce prices, which can further erode their profit margins.

To foster the growth of the Ethylene Dichloride market in India, domestic manufacturers need to focus on enhancing product quality, optimizing production efficiency, and exploring cost-effective manufacturing techniques. Strategic government policies and trade measures can play a pivotal role in ensuring a level playing field and supporting the growth of domestic industries.

Key Market Trends

Growing Demand from Emerging Applications

The India Ethylene Dichloride (EDC) market is experiencing a significant growth trend driven by the growing demand from emerging applications. This shift in market dynamics is shaping the landscape of EDC production and consumption in the country,

presenting exciting opportunities for market expansion and diversification.

One of the noteworthy factors driving this growth is the increasing use of EDC in emerging applications, such as the production of solvents, pharmaceuticals, and agrochemicals. EDC serves as a critical feedstock and intermediate in the manufacture of various chemical products. Its versatility, as both a solvent and a precursor in chemical synthesis, makes it indispensable in a wide range of industries. For instance, it is used in the production of specialty solvents for cleaning and degreasing applications and as a starting material for manufacturing pharmaceuticals and agrochemicals. The demand for EDC has seen an upswing due to its role in the production of PVC (polyvinyl chloride), a widely used plastic material in the construction and automotive industries. As urbanization and infrastructure development continue to thrive in India, PVC consumption has increased, boosting the requirement for EDC as a primary raw material.

The growth in demand from these emerging applications reflects the adaptability and versatility of EDC, positioning it as a fundamental building block in various industries. As India continues to diversify its industrial landscape and invest in these sectors, the EDC market is expected to thrive, demonstrating its crucial role in supporting the nation's economic progress and the development of new technologies and materials. This trend highlights the dynamic nature of the India EDC market and its responsiveness to evolving industrial requirements.

Increasing Investments in the EDC Industry

The India Ethylene Dichloride (EDC) market is currently witnessing significant growth due to a key trend: the increasing investments in the EDC industry. These investments are pivotal in reshaping the landscape of EDC production and consumption in India, offering tremendous opportunities for market expansion and modernization. The surge in investments is primarily aimed at augmenting the production capacity and enhancing the efficiency of EDC manufacturing facilities in the country. This development is driven by the burgeoning demand for EDC, which serves as a crucial feedstock for the production of polyvinyl chloride (PVC), a versatile material extensively used in various sectors, including construction, automotive, and packaging. As urbanization and infrastructure development continue to thrive in India, the demand for PVC remains robust, creating a subsequent need for increased EDC production. Investments in EDC production facilities, both for capacity expansion and process optimization, are critical in addressing this demand. These investments are instrumental in ensuring that the industry adheres to modern environmental and safety standards, contributing to sustainable and responsible chemical manufacturing. Investments in research and development are driving innovation in EDC production processes, with a focus on minimizing environmental impact and increasing energy efficiency. This not only aligns with India's commitment to sustainability but also positions the country as a competitive player in the global EDC market.

Segmental Insights

Application Insights

Based on the application, the vinyl chloride monomers segment is projected to experience rapid growth during the forecast period. This growth is attributed to the crucial role that EDC plays in the production of VCM, which is a primary precursor in the manufacturing of polyvinyl chloride (PVC), a versatile polymer with a wide range of applications. VCM is a key intermediate in the production of PVC, which is used in various industries, including construction, automotive, packaging, and consumer goods. PVC is valued for its durability, versatility, and cost-effectiveness, making it an essential material for manufacturing products like pipes, cables, window frames, flooring, and more.

The Indian market has witnessed significant growth in sectors that rely on PVC, particularly in the construction and infrastructure industries. The increased demand for PVC products has, in turn, driven the need for EDC and VCM, establishing the dominance of the VCM segment in the market. The production of PVC relies on the polymerization of VCM, making it a critical component in the PVC manufacturing process. As a result, the VCM segment plays a pivotal role in ensuring the quality and availability of PVC for various applications. As India's industrial and construction sectors continue to expand, the demand for PVC and VCM is expected to persist, ensuring the continued dominance of the VCM segment in the EDC market.

Regional Insights

Based on the region, the West region has indeed emerged as the dominant region, marking its significance in the production and distribution of this essential chemical compound. This regional prominence can be attributed to several factors, including well-established industrial infrastructure, proximity to key resources, and access to transportation networks.

The West region of India, particularly the states of Gujarat and Maharashtra, hosts a substantial portion of the country's chemical

and petrochemical manufacturing facilities. This region is known for its industrial clusters, chemical parks, and specialized zones dedicated to the chemical and petrochemical industries. These facilities have been instrumental in the production and distribution of EDC, supporting the region's dominance in the market. The West region benefits from its strategic geographical location near major ports and petrochemical complexes along the western coastline. This positioning facilitates efficient access to the import of crucial raw materials, such as ethylene and chlorine gas, which are key feedstocks for EDC production. This logistical advantage ensures a stable supply chain for manufacturers in the region.

The skilled workforce, business-friendly environment, and well-developed transportation infrastructure in the West region have further contributed to its dominance in the EDC market. As India's chemical and petrochemical sectors continue to grow and evolve, the West region's robust capabilities and strategic advantages make it a key contributor to the country's industrial development and the EDC market.

Key Market Players

- Arihant Solvents and Chemical
- Hwatsi Chemical Pvt. Ltd
- Pon Pure Chemicals
- Meru Chem Pvt. Ltd
- Ree Atharva lifescience Pvt. Ltd.

Report Scope:

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

□ India Ethylene Dichloride Market, By Production Process:

- o Direct Chlorination
- o Oxy Chlorination

□ India Ethylene Dichloride Market, By Application:

- o Vinyl Chloride Monomers
- o Ethylene Amines
- o Chlorinated Solvents
- o Degreasers
- o Paint Remover
- o Rubber & Plastics
- o Others

□□ India Ethylene Dichloride Market, By Region:

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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Ethylene Dichloride Market.

Available Customizations:

India Ethylene Dichloride 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).

Table of Contents:

- 1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market

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- 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 Ethylene Dichloride Market
- 6. India Ethylene Dichloride Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value & Volume
 - 6.2. Market Share & Forecast
 - 6.2.1. By Production Process (Direct Chlorination and Oxy Chlorination)
 - 6.2.2. By Application (Vinyl Chloride Monomers, Ethylene Amines, Chlorinated Solvents, Degreasers, Paint Remover, Rubber & Plastics and Others)
 - 6.2.3. By Region (North, South, East, West)
 - 6.2.4. By Company (2024)
 - 6.3. Product Market Map
- 7. North India Ethylene Dichloride Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Production Process
 - 7.2.2. By Application
- 8. South India Ethylene Dichloride Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Production Process
 - 8.2.2. By Application
- 9. East India Ethylene Dichloride Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Production Process
 - 9.2.2. By Application

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10. West India Ethylene Dichloride Market Outlook

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Production Process

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. Arihant Solvents and Chemical

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. Hwatsi Chemical Pvt. Ltd

17.3. Pon Pure Chemicals

17.4. Meru Chem Pvt. Ltd

17.5. Ree Atharva lifescience Pvt. Ltd

18. Strategic Recommendations

19. About us and Disclaimer

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