

India Acrylonitrile Market By Applications (Styrene (ABS), Acrylic Fibre, Acrylamide, Nitrile Butadiene, Rubber, Others), By End Use (Automotive, Construction, Electrical and Electronics, Textile, Packaging, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

India Acrylonitrile Market is expected to reach at 295.37 thousand Metric tonnes in 2024 and is poised for strong growth in the forecast period to reach 357.95 thousand Metric tonnes , with a projected Compound Annual Growth Rate (CAGR) of 3.29% through 2030.

The Indian Acrylonitrile market is a significant segment of the country's petrochemical industry, playing a pivotal role in the production of a wide range of essential products, including synthetic fibers, resins, and plastics. Acrylonitrile is a key building block chemical that finds applications in various industries. Acrylonitrile is a crucial component in the production of synthetic fibers, including acrylic fibers. The textile and apparel industry relies on these synthetic fibers for manufacturing various clothing and textiles. As India's textile and apparel industry continues to grow, the demand for Acrylonitrile remains robust. Acrylonitrile is used in the production of acrylonitrile-butadiene-styrene (ABS) resins and other plastic materials. These materials are widely employed in manufacturing a diverse range of products, including automotive parts, consumer goods, and packaging materials. The demand for these products contributes significantly to the Acrylonitrile market.

Acrylonitrile is also used in water treatment chemicals and as an intermediate in chemical synthesis. Its role in these applications further adds to the overall demand for Acrylonitrile. The supply of Acrylonitrile in India is met through a combination of domestic production and imports. Leading Indian petrochemical companies, such as Indian Oil Corporation (IOC) and Reliance Industries, operate Acrylonitrile production facilities, ensuring a steady supply to meet domestic requirements. While domestic production caters to a substantial portion of the market, India occasionally imports Acrylonitrile to bridge supply gaps or address specific demand surges. Import sources typically include countries like China, South Korea, and Japan.

The production, distribution, and use of Acrylonitrile in India are subject to regulatory standards set by government agencies such

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as the Bureau of Indian Standards (BIS) and the Ministry of Environment, Forest, and Climate Change. These regulations are in place to ensure safety, quality, and environmental standards are met. Given the potential environmental impact of Acrylonitrile production, adherence to stringent environmental regulations is essential. The competitive landscape of the Indian Acrylonitrile market features a mix of domestic and international players. Indian manufacturers benefit from their deep understanding of local market dynamics, regulatory compliance, and established relationships with domestic clients. These companies are integral to meeting the growing demand for Acrylonitrile in the textile, plastics, and chemical industries.

International companies from countries like China, South Korea, and Japan also play a significant role in the Indian market. They either directly export Acrylonitrile or collaborate with local distributors. This competition fosters innovation, quality enhancement, and competitive pricing, ultimately benefiting end-users. Acrylonitrile production depends on the availability and price of propylene, which is derived from petrochemical feedstocks. Fluctuations in raw material prices can significantly impact production costs and pricing. The Acrylonitrile production process can have implications on air and water quality. Adhering to stringent environmental regulations is critical to mitigate these concerns.

The industry is witnessing a growing emphasis on sustainable production practices. This includes the adoption of greener technologies, recycling of Acrylonitrile-based materials, and reducing the environmental footprint of production processes. Research and development efforts are focused on creating innovative applications for Acrylonitrile and its derivatives, expanding its usage beyond traditional sectors. These advancements drive market growth and diversification.

Therefore, the India Acrylonitrile market serves as a vital component of the nation's petrochemical industry, supporting the production of synthetic fibers, plastics, and various chemical applications. While challenges related to raw material dependency and environmental regulations persist, emerging trends in green chemistry and advanced applications offer opportunities for growth and sustainability. As India's textile and plastics industries continue to evolve and expand, the role of Acrylonitrile remains integral in shaping the nation's industrial landscape.

Key Market Drivers

Rising Demand for ABS Plastics Propels Indian Acrylonitrile Market Growth

The Indian acrylonitrile market is witnessing significant growth, driven by the rising demand for acrylonitrile butadiene styrene (ABS) plastics. ABS is a versatile thermoplastic polymer known for its strength, toughness, and excellent impact resistance, making it a preferred choice for a wide range of applications in industries such as automotive, consumer goods, electronics, and construction. As India's economy continues to grow, and with an increasing focus on consumer and industrial products, the demand for ABS plastics has been on the rise, making acrylonitrile a pivotal component in the production of ABS.

One of the primary applications of acrylonitrile is in the production of the butadiene-styrene-acrylonitrile (ABS) copolymer. ABS plastics offer a unique combination of properties, including high strength, impact resistance, and dimensional stability, which makes them suitable for various applications. ABS is widely used in automotive components, consumer goods, electronics, and the construction industry. In the automotive sector, ABS is used for manufacturing components such as bumpers, interior trim, and dashboard components due to its ability to withstand impacts and harsh environmental conditions.

In the consumer goods industry, ABS is employed for producing a wide range of products, including toys, appliances, and luggage. The material's durability and versatility make it suitable for items that require strength and impact resistance, ensuring the longevity and safety of consumer products. Furthermore, ABS plastics find extensive use in the electronics industry for enclosures, housings, and components for various devices and equipment. Its electrical insulating properties, coupled with its strength and ease of processing, make it an ideal choice for ensuring the protection and functionality of electronic devices.

The construction sector also relies on ABS for applications like pipes, fittings, and profiles. ABS's resistance to corrosion, impact, and chemicals, along with its ease of installation, contributes to its suitability for construction-related uses. As India's economy continues to expand, the demand for consumer goods, automotive components, electronics, and construction materials has increased significantly. This growth has led to higher requirements for ABS plastics, and consequently, for acrylonitrile as a crucial raw material for ABS production. The surge in construction activities, increased automotive production, and growing consumer demand for durable and safe products have all contributed to the elevated need for ABS in the country. To meet the rising demand for acrylonitrile used in ABS production, investments are being made in expanding production capacities and ensuring the quality and consistency of the material. A reliable supply of high-quality acrylonitrile is essential for manufacturers in the ABS plastics industry, as they depend on this key component to produce products that meet stringent industry standards and

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consumer expectations. The focus on sustainability and eco-friendliness in the plastics and polymer industry aligns with the use of ABS. Modern production processes in this sector have evolved to become more environmentally responsible, with a focus on reducing waste, energy consumption, and emissions. ABS contributes to these sustainability goals by enabling the production of durable, long-lasting, and recyclable products, aligning with the growing emphasis on environmental responsibility and product lifecycle management. The rising demand for ABS plastics is propelling the growth of the acrylonitrile market in India. ABS's unique combination of properties, including strength, impact resistance, and dimensional stability, makes it a versatile material for numerous applications in industries such as automotive, consumer goods, electronics, and construction. As India's economy expands, the demand for ABS plastics has surged, driving the need for acrylonitrile as a critical component in ABS production. This growth not only advances various industries but also strengthens India's position as a hub to produce durable, versatile, and sustainable polymer-based products that cater to the demands of modern consumers and industry.

Rising Automobile Industry is Expected to Drive India's Acrylonitrile Market Growth

The Indian acrylonitrile market is poised for significant growth, largely driven by the thriving automobile industry in the country. Acrylonitrile, a key chemical compound used in the production of synthetic rubber and resins, plays a pivotal role in the manufacturing of a wide range of automotive components. As India's automobile industry continues to expand and evolve, the demand for acrylonitrile is expected to surge, providing essential solutions for the production of high-performance and durable automotive parts.

One of the primary applications of acrylonitrile in the automotive sector is in the production of acrylonitrile-butadiene-styrene (ABS) and styrene-acrylonitrile (SAN) resins. These resins are widely used for the manufacturing of automotive components such as interior trim, dashboard components, door panels, and exterior body parts. ABS and SAN resins are preferred due to their excellent combination of properties, including high strength, impact resistance, and dimensional stability, which are critical for ensuring the safety, durability, and performance of automobiles.

In the automotive industry, acrylonitrile is crucial for producing components like bumpers, grilles, and interior trim. These parts require materials that can withstand impact, temperature variations, and exposure to environmental factors, and acrylonitrile-based resins meet these requirements, ensuring that vehicles are safe, reliable, and aesthetically appealing. As India's automobile manufacturing sector experiences growth, the demand for high-quality automotive components and materials, such as those made from ABS and SAN resins, is on the rise. The expansion of manufacturing facilities, increased production capacity, and the development of innovative vehicle models have all contributed to the increased demand for acrylonitrile. The shift in consumer preferences and the introduction of stricter safety and environmental regulations have driven the need for innovative and advanced automotive designs. Acrylonitrile-based materials are instrumental in achieving these goals, allowing automakers to produce vehicles that are not only stylish and functional but also safe, fuel-efficient, and environmentally friendly. The growth in India's automobile sector has led to investments in expanding acrylonitrile production capacities and ensuring the quality and consistency of the material. A reliable and consistent supply of high-quality acrylonitrile is essential for manufacturers in the automotive industry, as they depend on this key chemical to create components that meet industry standards and consumer expectations.

As the automotive industry seeks to reduce its carbon footprint and transition toward electric and hybrid vehicles, acrylonitrile's role in lightweighting and improving the fuel efficiency of vehicles becomes even more critical. Lightweight materials based on acrylonitrile, such as ABS and SAN resins, contribute to the reduction of vehicle weight and, consequently, lower fuel consumption and emissions. The rising automobile industry in India is expected to drive the growth of the acrylonitrile market. As the country's automobile manufacturing sector continues to expand and adapt to changing consumer preferences and regulatory requirements, acrylonitrile will play a pivotal role in the production of high-performance, lightweight, and eco-friendly automotive components. This growth not only advances the automotive industry but also strengthens India's position as a hub to produce innovative and sustainable vehicles that meet the demands of modern consumers and environmental standards.

Growing Demand for Water Treatment and Chemical Manufacturing is Propelling the India Acrylonitrile Market Growth

The Indian acrylonitrile market is experiencing significant growth, largely attributed to the growing demand from the water treatment and chemical manufacturing sectors. Acrylonitrile, a crucial chemical compound used in the production of various polymers and specialty chemicals, has found increased utility in applications related to water treatment and chemical manufacturing. As India's industrial and chemical sectors continue to expand, the demand for acrylonitrile is on the rise, providing

essential solutions for the production of materials that contribute to water purification and the synthesis of various chemical compounds.

One of the primary applications of acrylonitrile in the water treatment sector is in the manufacturing of polyacrylonitrile (PAN) membranes. PAN membranes are used in water and wastewater treatment processes, particularly in reverse osmosis and ultrafiltration systems. These membranes are critical for removing impurities, contaminants, and particles from water sources, ensuring the production of clean and safe drinking water and meeting the stringent standards for water quality.

The demand for clean and potable water is growing in India, driven by population expansion, urbanization, and the need to address water pollution issues. Water treatment processes, including those that employ PAN membranes, have become essential for providing access to safe drinking water and treating industrial wastewater, leading to a higher requirement for acrylonitrile in membrane production. Acrylonitrile is used in chemical manufacturing processes to produce a variety of chemicals and intermediates. It serves as a key building block for the synthesis of specialty chemicals like adiponitrile, which is used in the production of nylon-6,6, a critical material for textiles and engineering plastics. Chemical manufacturing industries also utilize acrylonitrile in the production of acrylamide, a chemical compound used in the manufacture of superabsorbent polymers (SAPs) that find application in diapers, hygiene products, and agriculture.

As India's chemical manufacturing sector expands and diversifies, the demand for acrylonitrile as a vital raw material to produce specialty chemicals has increased significantly. The chemical industry plays a pivotal role in the country's economic growth, as chemicals are used in a wide range of applications, including pharmaceuticals, agriculture, textiles, and industrial processes. Acrylonitrile contributes to the development of innovative and sustainable chemicals that can address various environmental and industrial challenges. Its utility in water treatment and chemical manufacturing aligns with the growing emphasis on eco-friendly and responsible production processes, which is becoming increasingly important in India and around the world.

The growth in India's water treatment and chemical manufacturing sectors has led to investments in expanding acrylonitrile production capacities and ensuring the quality and consistency of the material. A reliable and consistent supply of high-quality acrylonitrile is essential for manufacturers in these sectors, as they depend on this key chemical to produce materials and chemicals that meet strict industry standards and environmental regulations. The growing demand from the water treatment and chemical manufacturing sectors is propelling the growth of the acrylonitrile market in India. As the country addresses water treatment challenges, strives for clean and safe drinking water, and expands its chemical manufacturing capabilities, acrylonitrile is playing a pivotal role in membrane production and chemical synthesis. This growth not only advances the water treatment and chemical industries but also strengthens India's position as a hub for the production of materials and chemicals that contribute to environmental sustainability and address the diverse needs of modern industrial processes and water purification.

Key Market Challenges

Volatility in Raw Material Prices

Volatility in raw material prices is a significant hindrance to the growth of the Acrylonitrile market in India. Acrylonitrile, a vital chemical compound used in the production of synthetic fibers, resins, and plastics, depends on the stable and cost-effective availability of its primary feedstock, propylene. However, the pricing of propylene and other raw materials is subject to fluctuation due to various factors, including global market dynamics, supply disruptions, and geopolitical events. The unpredictable fluctuations in raw material prices not only disrupt production planning but also impact the profit margins of Acrylonitrile manufacturers. This creates challenges in pricing stability, resource allocation, and budgeting for both producers and consumers. To mitigate the impact of raw material price volatility, the India Acrylonitrile market should consider strategies such as diversifying sourcing options, implementing long-term supply agreements, and effective inventory management. These measures are essential for maintaining market competitiveness and fostering sustainable growth, even in the face of raw material price uncertainties.

Competition from Imports

Competition from imports is emerging as a notable hindrance to the growth of the Acrylonitrile market in India. Acrylonitrile, a crucial chemical compound used in the production of synthetic fibers, resins, and plastics, faces intense competition from cheaper imported alternatives. These imported products, often originating from countries with lower production costs and varying regulatory standards, enjoy a cost advantage, making them more attractive to Indian consumers and industries. The influx of imported Acrylonitrile not only impacts the market share of domestic manufacturers but also puts pressure on their pricing and

profitability. This, in turn, creates challenges for the local industry, including difficulties in maintaining market share and competitiveness.

To counter this challenge and stimulate growth in the India Acrylonitrile market, domestic producers must focus on enhancing product quality, cost efficiency, and innovation to remain competitive. Collaborations and partnerships with regulatory authorities to ensure a level playing field can also help address the competition from imports and maintain the market's long-term viability.

Key Market Trends

Growing Demand from Textile and Apparel Industry

The India Acrylonitrile market is currently experiencing robust growth, driven by a pivotal trend—the growing demand from the textile and apparel industry. Acrylonitrile is a key chemical compound used in the production of acrylic fibers, which have a wide range of applications, including textiles and apparel. The surge in demand from this sector is powered by several significant factors and is playing a central role in the expansion of the Acrylonitrile market.

One of the primary drivers of this trend is the evolving consumer preferences in the textile and fashion industry. Consumers are increasingly seeking clothing that offers a balance of comfort, durability, and style. Acrylic fibers, produced from Acrylonitrile, provide these qualities, making them an essential component in various apparel, including sweaters, blankets, and sportswear. Their versatility and adaptability to different types of clothing cater to the changing needs and preferences of consumers. The fashion industry's pursuit of sustainability is contributing to the growing demand for Acrylonitrile. Acrylic fibers are recognized for their excellent durability and resistance to wear and tear, leading to longer-lasting clothing items. This durability aligns with the industry's push for more sustainable practices, promoting longevity and reduced textile waste.

The versatility of acrylic fibers plays a pivotal role in meeting the demands of the textile and apparel industry. These fibers can mimic the look and feel of natural fibers while offering exceptional performance characteristics. As designers and manufacturers seek materials that can meet various fashion requirements, Acrylonitrile has gained prominence for enabling the production of apparel that combines fashion and functionality. The growing demand from the textile and apparel industry is a key driver for the growth of the India Acrylonitrile market. As the textile sector continues to evolve, driven by changing consumer preferences and sustainability concerns, Acrylonitrile's role in providing versatile, durable, and stylish solutions positions India as a dynamic player in the global textile and fashion market, fostering the expansion of the Acrylonitrile market.

Research and Development Efforts are Focused on Creating innovative Application

The India Acrylonitrile market is currently experiencing significant growth, and a prominent trend in this market is the focus on research and development (R&D) efforts directed toward creating innovative applications. Acrylonitrile is a versatile chemical compound known for its use in the production of acrylic fibers and resins, but its potential applications are expanding. The emphasis on R&D to unlock new and innovative uses for Acrylonitrile is driven by several crucial factors and is playing a central role in the growth of the Acrylonitrile market.

One of the primary drivers of this trend is the demand for sustainable and eco-friendly materials across various industries. Researchers are exploring innovative applications for Acrylonitrile that align with sustainability goals, including the development of biodegradable plastics and environmentally responsible coatings. As the world seeks solutions to reduce environmental impact, the development of such innovative applications is becoming increasingly important. The evolution of technology and materials science has opened up new possibilities for Acrylonitrile. Researchers are focusing on creating advanced applications that harness Acrylonitrile's unique properties, such as its excellent chemical resistance and thermal stability. These applications range from high-performance engineering plastics to specialty coatings, with potential uses in the automotive, aerospace, and electronics industries.

The competitive nature of the global chemical industry drives the pursuit of innovation. Indian manufacturers and researchers are keen to create unique and proprietary applications for Acrylonitrile to gain a competitive edge in the market. By diversifying the utility of Acrylonitrile, India positions itself as a forward-thinking player in the global chemical industry, fostering the expansion of the Acrylonitrile market. The focus on R&D efforts directed at creating innovative applications for Acrylonitrile is a key driver for the growth of the India Acrylonitrile market. As the chemical industry continues to evolve, driven by sustainability concerns and technological advancements, India's commitment to innovation supports its position as a dynamic player in the global chemical sector, contributing to the expansion of the Acrylonitrile market.

Segmental Insights

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Application Insights

Based on the Application, the automotive segment emerged as the dominant player in the Indian market for Acrylonitrile in 2024. Acrylonitrile is a crucial component in the production of acrylonitrile-butadiene-styrene (ABS) resins, which are widely used in the automotive industry. ABS resins are known for their high impact resistance, strength, and durability, making them a preferred material for various automotive components, including interior and exterior parts, dashboards, trim, and other components. The growth of the automotive sector in India and the demand for durable, lightweight, and aesthetically pleasing automotive parts have driven the prominence of the automotive segment in the Acrylonitrile market.

The automotive industry in India has been witnessing substantial growth, driven by factors such as rising consumer demand, increased disposable incomes, and urbanization. As the automotive sector expands, the need for high-quality materials like ABS resins also increases. Acrylonitrile is a key ingredient in ABS resins, making it an integral part of the automotive manufacturing supply chain. The Indian automotive industry caters to both domestic and international markets, necessitating the use of high-quality materials to meet international standards. Acrylonitrile's role in the production of ABS resins aligns with the automotive industry's requirements for reliable and durable components.

ABS resins offer advantages such as design flexibility, ease of processing, and resistance to environmental factors, all of which are important in the automotive sector. These properties contribute to the prominence of the automotive segment in the Acrylonitrile .

Regional Insights

Based on the region, the West India region's domination in the Indian Acrylonitrile market can be attributed to its strategic location, robust infrastructure, the presence of key industry players, a skilled workforce, investment-friendly policies, and the strong demand from various industrial sectors. These factors collectively contribute to its leading position in the Acrylonitrile market in India. West India, comprising states like Gujarat and Maharashtra, has emerged as a significant industrial hub with a thriving chemical and petrochemical sector. Several key elements contribute to the region's domination in this market.

West India is strategically located near major petrochemical hubs and ports, facilitating the efficient transportation of raw materials and finished products. The accessibility to ports like Kandla and Mumbai ensures seamless import and export of Acrylonitrile, making it a favorable location for manufacturers and distributors.

The region boasts well-developed infrastructure, including industrial parks, chemical clusters, and a robust transportation network. This infrastructure supports the manufacturing and distribution of Acrylonitrile, reducing logistical challenges and costs. Many leading chemical and petrochemical companies have established their operations in West India. This concentration of industry leaders has created a conducive ecosystem for the production and trade of Acrylonitrile.

West India benefits from a skilled labor force with expertise in chemical manufacturing and related processes. This skilled workforce is essential for ensuring the consistent quality and production of Acrylonitrile.

The West Indian states have attracted substantial investments in the chemical and petrochemical sectors. This has resulted in technological advancements, research and development activities, and a competitive edge that strengthens the region's position in the Acrylonitrile market. The governments of Gujarat and Maharashtra have implemented policies and initiatives to encourage industrial growth, including the chemical sector. This includes ease of doing business, tax incentives, and other measures that make it attractive for companies to set up operations in the region.

Key Market Players

□□National Analytical Corporation - Chemical Division

□□Otto Chemie Pvt. Ltd

□□Neeta Chemical (India) Pvt. Ltd.

□□Indian Petrochemicals Corporation Limited (IPCL)

□□Reliance Industries Limited

Report Scope:

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

□□India Acrylonitrile Market, By End Use:

- o Automotive
- o Construction

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- o Electrical and Electronics
- o Textile
- o Packaging
- o Others

□□India Acrylonitrile Market, By Application:

- o Styrene (ABS)
- o Acrylic Fibre
- o Acrylamide
- o Nitrile Butadiene
- o Rubber
- o Others

□□India Acrylonitrile 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 Acrylonitrile Market.

Available Customizations:

India Acrylonitrile 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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