India Ethylene Market By Feedstock (Naphtha, Ethane, Propane, Butane), By Application (Polyethylene, Ethylene Oxide, Ethyl Benzene, Ethylene Dichloride), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

India Ethylene Market achieved a total market volume of 6127.51 Thousand Metric Tonnes in 2024 and is poised for steady growth to reach 7,206.77 Thousand Metric Tonnes, with a projected Compound Annual Growth Rate (CAGR) of 2.81% through 2030. The Indian Ethylene market is a fundamental component of the country's petrochemical industry, serving as a building block for a wide range of essential products, including plastics, chemicals, and synthetic fibers. Ethylene, a hydrocarbon gas, is a critical raw material with applications spanning multiple industries.

Ethylene is the primary raw material to produce polyethylene, one of the most widely used plastics globally. The plastics industry relies heavily on polyethylene for the manufacturing of various products, including packaging materials, pipes, and consumer goods. As India's plastics industry continues to expand, the demand for Ethylene remains strong. Ethylene serves as a crucial feedstock for the production of various chemicals, including ethylene oxide, ethylene glycol, and a multitude of derivatives. These chemicals find applications in sectors such as textiles, automotive, and construction. The chemical industry's growth significantly contributes to the demand for Ethylene. Ethylene is used in the manufacturing of synthetic fibers, including polyester. The textile industry in India relies on these fibers for producing clothing and textiles. As the textile industry expands, the demand for Ethylene-based products increases.

The supply of Ethylene in India is ensured through domestic production and imports. Leading Indian petrochemical companies, such as Indian Oil Corporation (IOC) and Reliance Industries, operate Ethylene production facilities, ensuring a consistent supply to meet domestic needs. Domestic production caters to a significant portion of the market. However, India sometimes imports Ethylene to meet specific demands or address supply shortages. Import sources primarily include countries like the United States, Saudi Arabia, and other major petrochemical exporters. The production and use of Ethylene in India are subject to regulatory standards set by government agencies, including the Bureau of Indian Standards (BIS) and the Ministry of Environment, Forest, and Climate Change. These regulations aim to ensure safety, quality, and environmental standards are met, particularly given the

potential environmental implications of Ethylene production.
The competitive landscape of the Indian Ethylene market features a mix of domestic and international players. Indian manufacturers have an advantage in understanding local market dynamics, regulatory compliance, and established relationships with domestic clients. They are integral to meeting the growing demand for Ethylene in the plastics, chemicals, and textile industries. International companies from countries like the United States, Saudi Arabia, and other petrochemical-exporting nations also play a significant role in the Indian market. They either export Ethylene directly or collaborate with local distributors. This competition fosters innovation, quality enhancement, and competitive pricing, ultimately benefiting end-users.
Ethylene production is dependent on the availability and price of feedstock, particularly natural gas and naphtha. Fluctuations in the prices of these raw materials can significantly impact production costs and pricing. Ethylene production processes can have implications for air and water quality. Adherence to stringent environmental regulations is crucial to mitigate these concerns.
Key Market Drivers
Growing Demand from Plastics Industry
The Indian ethylene market is witnessing substantial growth, largely fueled by the increasing demand from the plastics industry. Ethylene is a crucial raw material to produce a wide range of plastic products and polymers, and it plays a pivotal role in various applications across the plastics sector. As India's plastics industry continues to expand and diversify, the demand for ethylene is on the rise, providing essential solutions for the production of everyday plastic goods, packaging materials, and more.
As of January 2023, the Indian plastic processing industry comprises around 30,000 units utilizing various techniques such as injection molding, blow molding, extrusion, and calendaring to produce a diverse range of products. The consumption of plastics in India exhibits significant regional variation, with Western India accounting for 47%, Northern India for 23%, and Southern India for 21%. The primary consumers in Northern India include industries such as automotive, packaging (including bulk packaging), plastics applications, and electronic appliances, with major concentrations in Uttar Pradesh and Delhi-NCR. However, other regions, including Rajasthan, Punjab, Haryana, Uttarakhand, Jammu & Kashmir, and Himachal Pradesh, are expected to experience growth in plastic processing, driven by increased feedstock availability and a growing emphasis on the manufacturing sector. Major use of ethylene is in the production of polyethylene (PE), one of the most widely used plastics in the world. PE is known for its versatility, strength, and durability, and it is used in the manufacturing of various plastic products, including packaging films, containers, pipes, and more. In India, the packaging industry relies heavily on polyethylene to create a wide range of products, from plastic bags and bottles to food packaging materials.
The demand for plastic packaging materials has been on the rise in India due to population growth, urbanization, and changing consumer habits. With an expanding middle-class population and a growing e-commerce industry, the need for plastic packaging materials, including polyethylene-based products, has surged. This has driven the demand for ethylene as the primary feedstock to produce polyethylene.
Additionally, ethylene plays a significant role in the production of polyvinyl chloride (PVC), another widely used plastic in India. PVC is known for its versatility and resistance to chemicals, making it suitable for applications in construction, agriculture, automotive, and healthcare. In the construction industry, PVC is used for pipes, fittings, and insulation materials, while in the healthcare sector, it is employed in the production of medical devices and packaging.
As India's construction sector continues to expand, driven by urbanization and infrastructure development, the demand for PVC materials is expected to increase. PVC is favored for its durability and resistance to corrosion, which are critical for applications in construction and infrastructure projects. This growth in construction and healthcare activities leads to a higher demand for ethylene as a fundamental component in PVC production.
The growth in the plastics industry has led to investments in expanding ethylene production capacities and ensuring the quality and consistency of the material. A reliable supply of high-quality ethylene is essential for manufacturers in the plastics industry, as they depend on this key feedstock to produce a wide range of plastic products that meet industry standards and consumer needs.
Moreover, as industries worldwide and in India continue to emphasize environmental sustainability, the plastics sector has been working towards developing recyclable and eco-friendly plastic products. Ethylene, as a key component in the production of plastics, is part of this sustainability drive. Innovative materials and recycling initiatives are helping reduce the environmental impact of plastics, which is in line with the goals of eco-friendliness and resource efficiency.
Rising Demand from Textile Industry for Manufacturing of Synthetic Fibers

The Indian ethylene market is experiencing significant growth, primarily due to the rising demand from the textile industry for the manufacturing of synthetic fibers. Ethylene, a fundamental building block in the production of various synthetic fibers, plays a pivotal role in the textile sector, where it is used to create a wide range of fabrics, clothing, and textiles. As India's textile industry continues to grow and innovate, the demand for ethylene as a crucial raw material is on the rise, providing essential solutions for the production of synthetic fibers used in apparel, home textiles, and industrial applications. In fiscal year 2023, India□s synthetic fiber production reached nearly four million metric tons, reflecting a slight decline from the previous year. The Indian chemical industry is highly diversified, manufacturing more than 80,000 products.

One of the primary applications of ethylene in the textile industry is in the production of polyester, a synthetic fiber widely used in textile and apparel manufacturing. Polyester offers several advantages, including its durability, resistance to wrinkles, and ease of care, making it a preferred choice for fabrics used in clothing, home furnishings, and technical textiles. In India, the demand for polyester-based textiles has grown significantly, driven by changes in consumer preferences and lifestyle trends.

Polyester fibers are used in various textile applications, including clothing, sportswear, activewear, and uniforms. The versatility of polyester makes it suitable for products ranging from lightweight, breathable clothing to heavy-duty industrial textiles. The textile industry in India has adapted to these changing demands, and the production of synthetic fibers like polyester, which depend on ethylene as a key raw material, has seen substantial growth. Ethylene is used in the production of polyethylene terephthalate (PET), which is a key component in the manufacture of synthetic fibers, including those used in the textile industry. PET fibers are known for their strength, resilience, and versatility. They are used in applications such as geotextiles, automotive textiles, and industrial fabrics. As India's construction and automotive industries expand, the demand for PET fibers used in geotextiles and automotive textiles is expected to increase.

The growth of India's textile industry has led to investments in expanding ethylene production capacities and ensuring the quality and consistency of the material. A reliable supply of high-quality ethylene is essential for manufacturers in the textile sector, as they depend on this key raw material to produce synthetic fibers that meet industry standards and consumer expectations. As sustainability and environmental responsibility become essential aspects of textile production, the industry has been focusing on developing eco-friendly and recyclable synthetic fibers. Ethylene's role in the production of these sustainable materials aligns with the global push for reducing the environmental footprint of the textile industry, making it more resource-efficient and eco-conscious.

The rising demand from the textile industry for the manufacturing of synthetic fibers is propelling the growth of the ethylene market in India. As the country's textile sector expands, driven by evolving consumer preferences and sustainability goals, ethylene plays a pivotal role in the production of versatile and durable synthetic fibers. This growth not only advances the textile industry but also strengthens India's position as a hub for the production of high-quality synthetic fibers that cater to the demands of modern consumers, industries, and environmental sustainability efforts.

Growing Demand for Chemical Manufacturing as a Crucial Feedstock

The Indian ethylene market is currently experiencing remarkable growth, primarily propelled by the increasing demand for chemical manufacturing. Ethylene is a crucial feedstock and a fundamental building block for various chemical processes, making it indispensable in the production of a wide range of chemicals and petrochemicals. As India's chemical manufacturing sector continues to expand and diversify, the demand for ethylene has surged, providing essential solutions for the synthesis of chemicals used in diverse industries such as agriculture, healthcare, automotive, and construction.

The primary applications of ethylene in the chemical manufacturing sector is as a raw material for the production of polyethylene, a versatile plastic widely used for various applications. Polyethylene's versatility, strength, and chemical resistance make it suitable for applications in packaging, construction, agriculture, automotive, and healthcare, among others. In the agricultural sector, polyethylene is used in the production of plastic mulch films, greenhouse coverings, and irrigation pipes, contributing to improved crop yields, water conservation, and reduced pesticide usage.

Polyethylene is also widely employed in the packaging industry, where it is used to produce plastic bags, bottles, containers, and packaging films. The growth of e-commerce and the increased demand for packaged goods have led to higher requirements for polyethylene materials in India. This expansion in the packaging sector has driven the demand for ethylene as the primary feedstock for polyethylene production. Ethylene is essential for the production of ethylene oxide, a chemical compound used in the manufacturing of various products, including detergents, surfactants, and pharmaceuticals. The healthcare and cleaning

product industries rely on ethylene oxide for the production of sterilization agents and pharmaceutical ingredients. As India's healthcare sector grows and the demand for pharmaceuticals and medical equipment increases, so does the need for ethylene oxide.

The growth of India's chemical manufacturing sector has prompted investments in expanding ethylene production capacities and ensuring the quality and consistency of the material. A reliable supply of high-quality ethylene is essential for manufacturers in the chemical industry, as they depend on this key feedstock to produce a wide range of chemicals and petrochemicals that meet strict industry standards and regulatory requirements. The emphasis on environmental sustainability and responsible chemical production aligns with the role of ethylene in the creation of eco-friendly and innovative chemical solutions. Ethylene's versatility in chemical manufacturing allows for the development of sustainable chemicals that can address various industrial and environmental challenges. This is in line with the growing emphasis on eco-friendliness, resource efficiency, and reduced environmental impact within the chemical manufacturing industry in India.

The growing demand from chemical manufacturing is propelling the growth of the ethylene market in India. As the country's chemical sector expands and addresses the demands of various industries, ethylene plays a pivotal role in the production of versatile chemicals and petrochemicals. This growth not only advances the chemical manufacturing industry but also strengthens India's position as a hub for the production of high-quality chemicals and innovative solutions that cater to the needs of modern industries, healthcare, and environmental sustainability efforts.

Key Market Challenges

Availability and Price of Feedstock

The availability and price of feedstock are critical factors hindering the growth of the Ethylene market in India. Ethylene, a fundamental petrochemical building block, is primarily produced through the steam cracking of hydrocarbons like ethane and naphtha. The availability and pricing of these feedstocks are subject to various market dynamics, including fluctuations in global oil prices, supply and demand imbalances, and geopolitical factors.

The unpredictability in the availability and cost of feedstock directly impacts the production economics of Ethylene. Fluctuations can lead to uncertainties in production planning and pricing strategies for manufacturers, creating challenges for maintaining competitiveness and profitability in the market.

To mitigate these challenges and promote growth in the India Ethylene market, stakeholders should consider strategies such as diversifying feedstock sourcing, exploring alternative production methods, and investing in technology and infrastructure to reduce feedstock dependence. These measures are essential for achieving a stable and cost-effective feedstock supply, which, in turn, can enhance market competitiveness and stimulate growth in the Ethylene industry.

Environmental Regulations

Environmental regulations are proving to be a significant hindrance to the growth of the Ethylene market in India. Ethylene, a critical building block for various petrochemical products, is produced through energy-intensive processes that can have adverse environmental impacts. To address these concerns, Indian regulatory authorities have implemented stricter environmental standards and emissions controls for the petrochemical industry.

Compliance with these regulations often necessitates substantial investments in emissions control technologies and cleaner production processes, which can increase production costs. This added cost not only affects the competitiveness of Ethylene producers but also poses challenges in terms of maintaining pricing stability and market growth.

To overcome these hurdles and encourage growth in the India Ethylene market, stakeholders should prioritize eco-friendly and sustainable production practices, adopt cleaner technologies, and collaborate with regulatory authorities to ensure compliance with evolving environmental standards. By doing so, the industry can address environmental concerns, maintain market stability, and foster sustainable growth in an increasingly eco-conscious business environment.

Key Market Trends

Growing Adoption of Ethylene Carbonate

The India Ethylene market is currently experiencing robust growth, with a significant trend being the growing adoption of Ethylene Carbonate. Ethylene Carbonate is a versatile chemical compound widely used in various industries, including electronics, batteries, and as a solvent in different applications. The surge in demand for Ethylene Carbonate is driven by several critical factors and is playing a pivotal role in the expansion of the Ethylene market.

One of the primary drivers of this trend is the burgeoning lithium-ion battery industry. Ethylene Carbonate is a crucial component in the electrolytes used in these batteries, which power a wide range of applications, from portable electronics to electric vehicles. As the demand for clean energy storage solutions and electric mobility rises, the adoption of lithium-ion batteries containing Ethylene Carbonate is growing significantly, bolstering the Ethylene market. The electronics industry relies heavily on Ethylene Carbonate as a solvent and in the manufacture of capacitors and other electronic components. With the ever-increasing demand for consumer electronics, smartphones, and various electronic devices, the utilization of Ethylene Carbonate has expanded to meet the stringent performance and quality requirements of these products.

Ethylene Carbonate's compatibility with a range of other chemicals and its ability to dissolve various polymers make it valuable in the chemical and industrial sectors. It serves as a critical solvent and component in the production of specialty chemicals and formulations, supporting various industrial applications. The growing adoption of Ethylene Carbonate is a key driver for the growth of the India Ethylene market. As industries such as battery manufacturing, electronics, and specialty chemicals continue to expand and diversify, Ethylene Carbonate plays a pivotal role in addressing their evolving needs. This trend positions India as a dynamic player in the global market, fostering the expansion of the Ethylene market and reinforcing its significance in various industrial applications.

Rising Demand from Real Estate Market

The India Ethylene market is currently experiencing significant growth, with a noteworthy trend being the rising demand from the real estate market. Ethylene, a fundamental chemical compound derived primarily from the petrochemical industry, plays a crucial role in the production of polyethylene, a key material used in construction and infrastructure projects. The surge in demand from the real estate sector is propelled by several important factors and is contributing to the expansion of the Ethylene market.

One of the primary drivers of this trend is the robust growth in the real estate and construction industry in India. The nation is witnessing an increase in infrastructure development, residential housing projects, and commercial real estate ventures, driven by urbanization, population growth, and economic development. Ethylene, through the production of polyethylene, is a key component in construction materials, including pipes, insulation, and various structural elements, which are essential for these projects.

India's affordable housing initiatives and the "Smart Cities" program are further boosting the demand for construction materials produced using Ethylene. Affordable housing projects require cost-effective and durable materials, and polyethylene offers a balance of affordability and performance. Ethylene-derived products are crucial in fulfilling the requirements of such housing and infrastructure developments.

The growing middle-class population and increased urbanization are driving demand for real estate and housing solutions. The real estate market is adapting to these changing demographics by focusing on quality construction and infrastructure, which, in turn, bolsters the requirement for Ethylene-derived materials. Thus, the rising demand from the real estate market is a key driver for the growth of the India Ethylene market. As the construction and real estate sectors continue to expand and evolve, driven by urbanization and economic growth, Ethylene's role in providing essential construction materials positions India as a dynamic player in the global market. This trend significantly contributes to the expansion of the Ethylene market and reinforces its importance in the development of infrastructure and housing solutions.

Segmental Insights

Feedstock Insights

Based on Feedstock, Naphtha have emerged as the dominating segment in the India Ethylene Market during the forecast period. This is due to the abundant supply, cost-effectiveness, and versatility of this feedstock. These factors have allowed India to secure its position as a major player in the global Ethylene production landscape. Naphtha, a hydrocarbon mixture obtained from crude oil distillation, is a preferred source for ethylene production due to its widespread availability and cost-effectiveness. It has gained prominence in India's ethylene production, owing to the country's reliance on crude oil and petrochemical industries. This dominance can be attributed to the versatility and adaptability of naphtha as a feedstock, making it a reliable choice for ethylene manufacturing. As a result, the naphtha segment has played a pivotal role in shaping the Indian Ethylene market's landscape. India possesses abundant reserves of crude oil, ensuring a steady and reliable supply of naphtha. This availability has allowed producers to consistently meet the growing demand for Ethylene in the country. Naphtha offers a cost-effective feedstock option,

making Ethylene production economically viable. Its relatively low cost in comparison to alternative feedstocks, such as natural gas or coal, has made it a preferred choice for petrochemical companies. The adaptability of naphtha cracking facilities to the production of Ethylene has been a pivotal factor. These facilities have been designed to efficiently convert naphtha into Ethylene, enabling the Indian market to scale up its Ethylene production capacity.

Application Insights

Based on Application, Polyethylene have emerged as the fastest growing segment in the India Ethylene Market during the forecast period. This growth is attributed to its diverse range of applications, which cater to the expanding needs of the country across various industries. This dominance is expected to persist as India continues its economic growth and industrial development.

One of the primary reasons for the polyethylene segment's dominance is its wide-ranging applications. Polyethylene is utilized in the manufacturing of numerous products, including packaging materials, pipes, containers, and various consumer goods. Its flexibility, durability, and ease of processing make it an ideal choice for a diverse set of industries, ranging from packaging and construction to agriculture and healthcare.

The Indian market's substantial growth in sectors like retail, e-commerce, and agriculture has further bolstered the demand for polyethylene-based products, leading to increased production of Ethylene. The rise in disposable income, urbanization, and the government's push for infrastructure development have all contributed to the dominance of polyethylene in the market.

Additionally, the sustainability and recyclability of polyethylene have aligned with the global trend towards eco-friendly materials, making it a preferred choice for environmentally conscious consumers and businesses.

Regional Insights

Based on Region, West India have emerged as the dominating region in the India Ethylene Market during the forecast period. This regional dominance can be attributed to a combination of factors, including industrial infrastructure, petrochemical clusters, and proximity to key sources of feedstock. The Western region of India is home to several well-established and significant industrial hubs, particularly in states like Gujarat and Maharashtra. These areas have witnessed substantial investments in the petrochemical and chemical industries, which rely heavily on Ethylene as a crucial building block for various products. Moreover, the West region is strategically located near major ports, which facilitates the import of feedstock and the export of Ethylene-based products. This geographical advantage has made it easier for manufacturers in this region to access raw materials and distribute their products both domestically and internationally.

Gujarat, in particular, houses some of the country's largest and most advanced petrochemical complexes, making it a major Ethylene production center. These facilities benefit from proximity to oil refineries, ensuring a stable supply of feedstock such as naphtha and natural gas. The presence of a skilled workforce, well-developed transportation infrastructure, and a business-friendly environment have further contributed to the West region's dominance in the Indian Ethylene market.

Key Market Players

- Reliance Industries Limited
- Indian Oil Corporation Limited
- GAIL (India) Limited
- ONGC Petro Additions Limited
- Haldia Petrochemicals Limited

Report Scope:

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

- India Ethylene Market, By Feedstock:
  - o Naphtha
  - o Ethane
  - o Propane
  - o Butane
- India Ethylene Market, By Application:
  - o Polyethylene
  - o Ethylene Oxide

o Ethyl Benzene
o Ethylene Dichloride
India Ethylene 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 Market.
Available Customizations:
India Ethylene 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
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 Market
6. India Ethylene Market Outlook
6.1. Market Size & Forecast
6.1.1. By Value & Volume
6.2. Market Share & Forecast
6.2.1. By Feedstock (Naphtha, Ethane, Propane, Butane)
6.2.2. By Application (Polyethylene, Ethylene Oxide, Ethyl Benzene, Ethylene Dichloride)
6.2.3. By Region
6.2.4. By Company (2024)
6.3. Market Map

7. North India Ethylene Market Outlook
7.1. Market Size & Forecast
7.1.1. By Value
7.2. Market Share & Forecast
7.2.1. By Feedstock
7.2.2. By Application
8. South India Ethylene Market Outlook
8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Feedstock
8.2.2. By Application
9. East India Ethylene Market Outlook
9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Feedstock
9.2.2. By Application
10. West India Ethylene Market Outlook
10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Feedstock
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. Reliance Industries Limited
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. Indian Oil Corporation Limited
17.3. GAIL (India) Limited
17.4. ONGC Petro Additions Limited
17.5. Haldia Petrochemicals Limited
18. Strategic Recommendations
19. About us and Disclaimer

India Ethylene Market By Feedstock (Naphtha, Ethane, Propane, Butane), By Application (Polyethylene, Ethylene Oxide, Ethyl Benzene, Ethylene Dichloride), By Region, Competition, Forecast & Opportunities, 2020-2030F

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