

**India Xylene Market, By Additives (Solvents, Monomers, Others), By Type (Ortho-Xylene, Meta-Xylene, Para-Xylene, Mixed Xylene), By Region, Competition, Forecast & Opportunities, 2020-2030F**

Market Report | 2024-12-06 | 80 pages | TechSci Research

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**Report description:**

India Xylene Market was valued at USD 2.85 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.85% through 2030. The Indian xylene market has experienced notable growth, fueled by the expansion of key end-use sectors, increasing demand for petrochemical derivatives, and strong economic momentum. Xylene, a highly flammable, colorless liquid, plays a critical role in the production of polyester fibers, films, and resins, positioning it as an essential input for both the petrochemical and textile industries. This market's growth is further supported by India's accelerating industrialization, urban expansion, and the rising need for packaging materials and plastics.

The xylene market is set to expand further, driven by sustained demand from the polyester and packaging industries, coupled with continued urbanization and industrial growth. Strategic investments in infrastructure and petrochemical facilities, along with government efforts to strengthen domestic manufacturing capabilities, are expected to further stimulate market development. However, market players will need to navigate key challenges, including increased regulatory scrutiny on environmental impacts and fluctuating raw material prices due to volatility in crude oil markets.

While the Indian xylene market offers significant growth potential, companies in this space must remain proactive in addressing environmental regulations and managing input cost fluctuations to sustain profitability and long-term competitiveness.

**Key Market Drivers**

**Rising Demand from the Polyester Industry**

The rising demand from the polyester industry is one of the most significant drivers of growth for the India xylene market, largely due to xylene's integral role in the polyester manufacturing process. Polyester, being a versatile and widely used synthetic fiber, has a broad range of applications in textiles, packaging, and various industrial uses. The rapid expansion of the polyester industry, both in India and globally, has created a strong and sustained demand for xylene, particularly para-xylene (PX), which is a key feedstock for producing polyester intermediates like Purified Terephthalic Acid (PTA) and Dimethyl Terephthalate (DMT).

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Para-xylene is essential for producing PTA, which is used in manufacturing polyester fibers and resins. Nearly 98% of para-xylene produced globally is consumed in the production of PTA, which highlights the close relationship between xylene demand and polyester production. As the polyester industry grows, driven by its increasing application in textiles, packaging, and industrial materials, the demand for xylene has risen in parallel to meet the raw material requirements of polyester production facilities. India is one of the largest producers and exporters of textiles and apparel, and polyester is a key material in this sector. The country's burgeoning middle class, rising disposable incomes, and increased urbanization have led to greater consumer demand for affordable, durable, and versatile fabrics, many of which are made from polyester. Polyester's properties, such as being wrinkle-resistant, lightweight, and durable, make it a popular choice for apparel, home textiles, and industrial fabrics. This surge in demand for polyester has translated directly into increased consumption of xylene, as it is a critical feedstock for producing polyester raw materials. Additionally, the shift in global textile supply chains, with countries like India emerging as major textile and apparel manufacturing hubs, further amplifies the demand for xylene-based products. This is especially relevant as Indian manufacturers ramp up their production capacity to cater to both domestic and international markets. Beyond textiles, polyester is a key component in the packaging industry, especially in the form of Polyethylene Terephthalate (PET). PET is widely used for manufacturing plastic bottles, food containers, and packaging films due to its strong, lightweight, and recyclable nature. With the growth of the packaged food and beverage industry, e-commerce, and the increasing trend toward sustainable packaging, the demand for PET has surged. Since para-xylene is a critical input in producing PET, this rise in demand for PET packaging drives the xylene market's growth in India. India's expanding consumer base, rising retail sector, and increasing consumption of packaged goods all contribute to the rising demand for PET, reinforcing the connection between polyester's growth and the xylene market. Polyester, a synthetic fiber, has steadily gained market share over natural fibers like cotton, primarily due to its cost-effectiveness, durability, and ease of production. As global fashion trends evolve, the use of polyester in fast fashion, athleisure, and home furnishings has risen, supporting the growth of polyester production. This ongoing shift towards synthetic fibers, especially in developing countries like India where polyester is increasingly favored for its affordability and versatility, continues to boost demand for para-xylene. The rapid pace of the fast fashion industry, coupled with rising urbanization and changing consumer preferences for easy-care fabrics, is directly linked to the expansion of the polyester industry, further increasing the demand for xylene. Technological advancements in polyester production have made the manufacturing process more efficient and cost-effective. This has encouraged Indian polyester producers to expand their production capacities to meet both domestic and international demand. Large-scale investments in polyester manufacturing plants, coupled with the growth of downstream industries such as apparel and packaging, have led to increased consumption of PTA and consequently, para-xylene. Major Indian conglomerates, including Reliance Industries, are expanding their para-xylene production capacity to meet the growing demand from the polyester sector. This trend of vertical integration in the polyester supply chain helps ensure a stable supply of xylene and improves cost efficiencies for polyester manufacturers, further bolstering the growth of the xylene market. India is a major exporter of polyester yarn, fabric, and finished products to markets such as the U.S., Europe, and Southeast Asia. With global demand for polyester increasing, Indian manufacturers are expanding their production to cater to export markets, which further stimulates the demand for xylene. Polyester's global popularity, due to its versatility and low production cost, has made India a key player in the global polyester supply chain, directly supporting the xylene market. As global economies recover from disruptions caused by the COVID-19 pandemic, demand for polyester products is expected to rise, further driving the need for xylene in the production of polyester intermediates. Although there are growing concerns over the environmental impact of synthetic fibers, polyester remains a preferred choice due to its recyclability, particularly in the form of Recycled PET (rPET). The push towards more sustainable and circular economies has led to an increase in the use of recycled polyester in textiles and packaging. While this trend may reduce the demand for virgin xylene in the long run, the current scale of polyester production and the gradual pace of change ensure that xylene demand remains robust in the foreseeable future. As consumers and companies alike focus on sustainability, the demand for polyester's recyclable qualities is expected to further support its widespread use, reinforcing the link between polyester demand and xylene consumption.

#### Growing Packaging Industry

The growing packaging industry is a key driver of growth for the India xylene market, owing to the rising demand for plastics, particularly Polyethylene Terephthalate (PET), which is produced using xylene derivatives. The expansion of the packaging sector, driven by consumer preferences, industrial needs, and sustainability trends, has significantly increased the consumption of

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xylene-based products. Polyethylene Terephthalate (PET), a plastic resin derived from para-xylene (PX), is a cornerstone material in the packaging industry. PET is widely used in producing bottles, food containers, and packaging films due to its strength, durability, and recyclability. As the Indian consumer base grows, with increasing urbanization and shifting lifestyle preferences, the demand for packaged goods, particularly in the food and beverage sector, has surged. PET's unique qualities—such as being lightweight, transparent, and chemically resistant—make it the preferred material for packaging beverages, including water, soft drinks, and juices, as well as edible oils and personal care products. This rise in PET-based packaging has led to a direct increase in the demand for para-xylene, the key input in manufacturing Purified Terephthalic Acid (PTA), which is essential for producing PET. The rapid expansion of PET consumption drives the need for xylene, strengthening the overall xylene market.

The rapid expansion of India's e-commerce sector has had a profound impact on the packaging industry. With the increasing popularity of online shopping platforms, there is greater demand for protective and flexible packaging to ensure the safe delivery of goods, particularly in sectors like food, personal care, electronics, and apparel. Flexible packaging, often made using polyester films derived from xylene, provides durability and protection for products during transit. Additionally, the retail sector has seen significant growth, with large supermarket chains and convenience stores proliferating across urban and semi-urban areas. This has amplified the demand for ready-to-consume products and pre-packaged food, further increasing the need for high-quality plastic packaging solutions. As the e-commerce and retail sectors expand, the consumption of PET-based packaging, which requires xylene for its production, continues to rise, fueling the xylene market's growth. Sustainability has become a key focus in the global packaging industry, and PET's recyclable nature aligns with this shift towards eco-friendly materials. The growing consumer and regulatory demand for sustainable packaging solutions has led to an increased reliance on PET, as it is one of the most recycled plastics globally. This shift toward sustainability further drives the demand for PET products, boosting the need for para-xylene as a primary input. While recycled PET (rPET) is becoming more prevalent, the demand for virgin PET continues to grow due to the increasing overall consumption of packaging materials. Even with the rise of recycling initiatives, the expanding use of PET, particularly in emerging markets like India, ensures robust demand for xylene.

India's food and beverage sector is experiencing significant growth, driven by factors such as increasing urbanization, changing dietary habits, and a rising middle class. The demand for packaged food, ready-to-eat meals, and beverages is accelerating, leading to a greater need for food-safe and durable packaging materials. PET is a favored material in this sector because of its properties, such as being lightweight, shatter-resistant, and able to preserve freshness, making it ideal for packaging beverages and food items. As the food and beverage sector continues to expand, so does the demand for PET containers and bottles, which require xylene-based PTA for their production. This growth directly correlates with increased consumption of xylene in the packaging industry. In addition to food and beverages, the pharmaceutical and personal care industries are major consumers of PET packaging. The demand for safe, tamper-resistant, and durable packaging for medicines, healthcare products, and personal care items like shampoos and lotions has been on the rise. PET's ability to provide contamination-free and strong barrier properties makes it a preferred choice for these industries. India's expanding healthcare sector, coupled with growing awareness of hygiene and personal care, is driving the demand for PET packaging. As pharmaceutical companies and personal care brands increasingly rely on PET for packaging solutions, this further strengthens the xylene market.

Although there is a global push toward reducing single-use plastics, the convenience and cost-effectiveness of plastic packaging, particularly PET, still drive significant demand in sectors such as food delivery, beverages, and retail. Single-use PET bottles, containers, and wraps remain popular in India due to their widespread availability, low cost, and ease of use. The increasing consumption of bottled water, soft drinks, and single-serve food products in India has led to greater production of PET packaging, which in turn drives the demand for xylene. While regulatory changes may eventually curb single-use plastic consumption, the current demand for PET packaging is still a substantial growth driver for the xylene market. As the packaging industry grows, there has been a parallel increase in investment in manufacturing infrastructure to support the rising demand for PET and other plastic packaging materials. Leading packaging manufacturers are expanding their production capacities, modernizing plants, and integrating advanced technologies to increase output and improve the efficiency of PET production. This expansion in packaging infrastructure requires a steady supply of para-xylene, further driving the xylene market in India. Indian companies are exploring new packaging technologies that improve material efficiency, extend shelf life, and reduce environmental impact. Innovations such as biodegradable plastics and lightweight PET bottles are gaining traction but still rely on xylene derivatives, maintaining demand for xylene in packaging innovation.

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## Key Market Challenges

### Environmental Sustainability and Regulatory Pressures

One of the most significant challenges for the India xylene market is the growing emphasis on environmental sustainability and the increasing regulatory scrutiny surrounding the use of petrochemical-based products. Xylene is derived from crude oil and natural gas, making its production closely linked to fossil fuel extraction and processing, industries that are often criticized for their environmental impact.

Air and water pollution concerns related to the xylene production process are also driving tighter environmental regulations. Xylene emissions, which can result in air and water contamination, pose health risks to nearby communities and ecosystems. This has led to increased pressure on industry to adopt cleaner technologies, reduce emissions, and improve waste management practices. However, transitioning to more environmentally friendly processes often requires significant capital investment, which can increase operational costs and erode profit margins. Moreover, the push for a circular economy and the global trend toward reducing the consumption of single-use plastics—which are often made from xylene derivatives like PET—could reduce demand for xylene-based products over time. As countries, including India, implement plastic bans and encourage the use of recycled materials, the xylene market may face diminishing demand in certain segments. The pressure to adopt more sustainable practices and comply with stringent environmental regulations poses a challenge to the xylene market's profitability and growth.

### Price Volatility of Crude Oil and Feedstock Availability

The volatility in crude oil prices is a significant factor that affects the xylene market, as xylene is produced through the refining of crude oil. Fluctuating global oil prices—driven by geopolitical tensions, supply-demand imbalances, and OPEC decisions—have a direct impact on the cost of xylene production. When oil prices surge, the cost of xylene increases, making it more expensive for downstream industries to procure the chemical, which can reduce overall demand.

In addition to price fluctuations, feedstock availability is another critical challenge. Xylene is primarily obtained through the refining of naphtha, a byproduct of crude oil refining. Any disruption in the supply of crude oil or refining operations can lead to shortages of feedstock for xylene production. India's reliance on crude oil imports makes the country particularly vulnerable to supply chain disruptions caused by geopolitical conflicts, trade restrictions, or natural disasters in oil-exporting countries. Furthermore, India's heavy dependence on imported crude oil means that the xylene market is exposed to foreign exchange risk. Fluctuations in the Indian rupee against major currencies, especially the U.S. dollar, can increase the cost of imports, further affecting xylene production costs and market stability. The combination of crude oil price volatility and supply chain disruptions poses a considerable challenge to the xylene market, as producers and consumers alike struggle with cost uncertainty and supply inconsistencies.

## Key Market Trends

### Technological Advancements in Xylene Production

Innovation in production technologies is a key trend that is set to drive the future growth of the India xylene market. As the industry faces increasing pressure to enhance efficiency, reduce environmental impact, and improve cost competitiveness, new technologies are being developed to optimize xylene production.

One notable advancement is the shift towards more energy-efficient catalytic processes in xylene production. Traditional xylene production involves significant energy consumption and complex processes, often leading to high costs and carbon emissions. However, new catalytic reforming and separation technologies are improving yield efficiency, reducing energy consumption, and minimizing by-product waste. By adopting these advanced technologies, producers can achieve higher productivity at lower operational costs, making the xylene market more competitive. Innovations in bio-based xylene production are gaining attention. While bio-based xylene is still in its early stages, the development of renewable and sustainable feedstocks for producing xylene could open new avenues for growth. Research into using biomass and waste materials as alternative raw materials for xylene production aligns with the global push toward sustainability and reducing reliance on fossil fuels. As this technology matures, it could create a significant shift in how xylene is produced and consumed, enhancing market opportunities in India. The integration of automation and digitalization in the production process is also transforming the industry. By leveraging smart manufacturing technologies like AI, IoT, and data analytics, producers can enhance operational efficiency, monitor production in real-time, and reduce downtime, further driving the market forward.

### Shift Towards Lightweight Materials in the Automotive Industry

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The increasing demand for lightweight materials in India's automotive sector is another significant trend driving the future growth of the xylene market. As automotive manufacturers face stricter fuel efficiency regulations and growing consumer demand for environmentally friendly vehicles, they are shifting towards lightweight plastic materials to reduce vehicle weight and enhance performance.

Xylene derivatives, particularly Polyethylene Terephthalate (PET) and other engineering plastics, are critical materials used in producing various lightweight components in automobiles. These include interior parts, fuel tanks, bumpers, and other components where reducing weight can significantly improve fuel efficiency and lower carbon emissions. As the automotive industry continues to innovate in lightweight material applications, the demand for xylene-based products is expected to increase. The rising popularity of electric vehicles (EVs) in India is accelerating this trend. EVs require lighter materials to offset the weight of batteries, which enhances range and energy efficiency. PET and other xylene-derived materials are playing a critical role in the development of lighter, energy-efficient electric vehicles, further driving demand for xylene products.

As India continues to push for electric mobility and fuel-efficient vehicles, the increased use of lightweight xylene-derived plastics in automotive manufacturing is likely to become a key growth driver for the market. This shift towards lightweight and high-performance materials is not only reducing vehicle weight but also increasing the overall demand for advanced petrochemical products like xylene.

#### Segmental Insights

##### Type Insights

Based on the category of Type, the Mixed-Xylene segment emerged as the dominant in the market for India Xylene Market in 2024. The dominance of the mixed-xylene segment in the India xylene market is closely tied to its pivotal role in the petrochemical value chain. Mixed-xylene is a critical feedstock used in the production of para-xylene (PX), which in turn is a key precursor for the manufacturing of purified terephthalic acid (PTA) and dimethyl terephthalate (DMT) two essential raw materials to produce polyethylene terephthalate (PET). PET is extensively used in the production of fibers, textiles, packaging materials, and plastic bottles, all of which have seen a significant surge in demand in India. As the textile industry in India continues to grow, with the country being one of the largest producers of synthetic fibers globally, the demand for para-xylene (and by extension, mixed-xylene) has increased substantially. The mixed-xylene segment benefits directly from the rising demand for polyester fibers, making it the most sought-after form of xylene in the Indian market. Additionally, India's increasing consumption of PET for packaging applications driven by rising urbanization, growth in the fast-moving consumer goods (FMCG) sector, and the expanding e-commerce industry further boosts the demand for mixed-xylene, as para-xylene is a crucial input in PET production. The availability and large-scale production of mixed-xylene in India contribute to its market dominance. Mixed-xylene is typically derived from crude oil refining through the catalytic reforming process, a process that is widely implemented in India's expanding refining sector. As India ramps up its refining capacity to meet the growing demand for petrochemicals, fuels, and specialty chemicals, the output of mixed-xylene has increased proportionally. India is home to several large refineries and petrochemical complexes, including those operated by major players like Reliance Industries, Indian Oil Corporation, and Bharat Petroleum Corporation Limited. These refineries produce mixed-xylene as a key petrochemical output, ensuring a steady and large-scale supply of the compound to downstream industries. The scale of production gives mixed-xylene a competitive edge over other xylene isomers, allowing it to be more widely distributed and more cost-effective. The strategic location of refineries near industrial hubs ensures that mixed-xylene is readily available for use in both domestic consumption and exports. This large-scale availability enhances the competitiveness of the mixed-xylene segment, solidifying its dominant market position. Mixed-xylene's dominance in the India xylene market is also driven by its cost-effectiveness and the operational flexibility it offers in petrochemical production. Mixed-xylene is typically less expensive to produce and refine compared to pure xylene isomers due to its lower degree of separation and purification requirements. This cost advantage makes it a preferred choice for industries seeking cost-efficient feedstocks to produce solvents, coatings, and petrochemical intermediates. In addition, mixed-xylene can be easily separated into its individual isomers based on market demand. This flexibility allows producers to adjust their production output according to the demand for specific xylene derivatives, such as para-xylene or ortho-xylene, making mixed-xylene an efficient and adaptable feedstock for multiple downstream applications. For instance, during periods of high demand for polyester fibers, which require large amounts of para-xylene, mixed-xylene producers can allocate more of their output to para-xylene production. Conversely, if demand for solvents and paints increases, producers can focus on meta-xylene or ortho-xylene

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extraction. This adaptability ensures that mixed-xylene remains a dominant and versatile segment in the xylene market, catering to diverse industrial needs without incurring significant additional costs. These factors are expected to drive the growth of this segment.

#### Regional Insights

West India emerged as the dominant in the India Xylene Market in 2024, holding the largest market share in terms of value. West India, specifically the states of Gujarat and Maharashtra, is home to some of India's largest and most advanced petrochemical complexes and refining hubs, making the region a powerhouse in xylene production. Major players in the xylene market, such as Reliance Industries, Indian Oil Corporation, and Essar Oil, have established large-scale refining and petrochemical operations in this region. Gujarat's Jamnagar refinery, operated by Reliance Industries, is the world's largest refining complex, with a significant portion of its production dedicated to xylene and other petrochemical derivatives. The proximity of this refinery to key industries that demand xylene-based products gives the region a competitive edge. The large-scale production of xylene in West India ensures a steady supply of the chemical for domestic consumption and exports, reinforcing the region's dominance. In addition, the Hazira and Vadodara industrial complexes in Gujarat also play a pivotal role in the production of xylene and other aromatics. These facilities benefit from state-of-the-art infrastructure and access to vast feedstock resources, making them central to the xylene market. Maharashtra, particularly the Mumbai-Pune industrial belt, further strengthens West India's position with its robust petrochemical and industrial base, contributing to the overall output of xylene in the region.

West India's dominance in the xylene market is also driven by its close proximity to major end-user industries, including textiles, packaging, automotive, and paints and coatings. These industries are heavy consumers of xylene derivatives such as polyethylene terephthalate (PET), para-xylene (PX), and solvents, creating a strong demand for xylene in the region. Textile production is one of the most significant industries in Gujarat and Maharashtra. Gujarat, often referred to as the textile capital of India, is a major hub for polyester and synthetic fiber production, which heavily relies on xylene-derived products like para-xylene. The region's dominance in polyester manufacturing drives a large portion of the demand for xylene, especially given the global shift toward synthetic fibers for clothing, furnishings, and industrial applications. The packaging industry is another key consumer of xylene derivatives, particularly PET, which is used extensively in plastic bottles and packaging materials. West India's industrial base includes some of the largest packaging companies in the country, further fueling the demand for xylene-based inputs. Maharashtra has a strong packaging industry, catering to the FMCG, pharmaceutical, and e-commerce sectors, which are growing rapidly due to urbanization and increased consumerism. The automotive sector in West India, with significant manufacturing plants in cities like Pune and Aurangabad, also drives the consumption of xylene derivatives. Xylene-based solvents are used in paints, coatings, and adhesives for automotive production, supporting the region's demand for the chemical. As vehicle production and demand for lightweight materials increase, the consumption of xylene-based products is expected to rise further in this region.

#### Key Market Players

- Exxon Mobil Corporation
- Reliance Industries Limited
- INEOS AG
- Chevron Phillips Chemical Company LLC
- Eastman Chemical India Private Limited
- Honeywell International Inc
- Shell
- Aramco Asia India Pvt. Ltd.

#### Report Scope:

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

- India Xylene Market, By Additives:
  - o Solvents
  - o Monomers
  - o Others

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□□ India Xylene Market, By Type:

- o Ortho-Xylene
- o Meta-Xylene
- o Para-Xylene
- o Mixed Xylene

□□ India Xylene Market, By Region:

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

Competitive Landscape

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

Available Customizations:

India Xylene 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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